

EVALUATION REPORT

Midterm Evaluation of Linking Ukrainian SMEs in the Fruit and Vegetables Sectors to Global and Domestic Markets and Value Chains Phase II

Independent Evaluation Unit

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This evaluation report makes reference to the following SDGs:



MIDTERM EVALUATION OF LINKING UKRAINIAN SMES IN THE FRUIT AND VEGETABLES SECTORS TO GLOBAL AND DOMESTIC MARKETS AND VALUE CHAINS PHASE II PROJECT

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The ITC Independent Evaluation Unit has carried out this evaluation under its 2023-2024 Work Programme and is responsible for this publication. The evaluation was carried out by an external evaluation consultant (Lilit V. Melikyan) and was managed by the ITC Associate Monitoring and Evaluation Officer (Marianne Schmitt). The Head of the ITC Independent Evaluation Unit (Miguel Jiménez Pont) provided oversight and quality assurance.

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ACRONYMS

AA	Association Agreement
AGRO	Agriculture Growing Rural Opportunities (USAID)
B2B	Business -to-Business matchmaking
BMO	business membership organization
BSO	business support organizations
CEP	Competitive Economy Program (USAID)
CSR	Corporate Social Responsibility
DAC	Development Assistance Committee
DCFTA	Deep and Comprehensive Free Trade Agreement
EBRD	European Bank for Reconstruction and Development
EEPO	Enterprise and Export Promotion Office of Ukraine
ERA	Economic Resilience Activity (USAID)
ESG	environmental and social governance (ESG)
EU	European Union
F&V	Fruits and vegetables
FAO	Food and Agriculture Organization
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit
GLOBALG.A.P	Global Agricultural Practices
HACCP	Hazard Analysis and Critical Control Points
HQ	headquarters
IC	International Consultant
IDP	Internally Displaced Persons
IEU	Independent Evaluation Unit
IFC	International Finance Corporation
IPD	Import Promotion Desk (Germany)
ITC	International Trade Center
KII	Key Informant interview
LNOB	Leave Noone behind
M&E	Monitoring and Evaluation
MAPFUU	Ministry of Agrarian Policy and Food
MEDTU	Ministry of Economic Development and Trade of Ukraine
MoU	Memorandum of Understanding
MSME	Micro, small and medium sized enterprises
MTE	Midterm Evaluation
MTR	Midterm review
NAAAS	National Association of Agricultural Advisory Service
NPM	National Project Manager
OECD	Organization for Economic Cooperation and Development
OEECA	Office for Eastern Europe and Central Asia
OIV	International Organisation of Vine and Wine
ProDoc	Project Document
PSC	Project Steering Committee
QI	Quality Infrastructure
RBM	Results-Based Management
RCO	Resident Coordinator office (UN)
SDG	Sustainable Development Goals
SECO	State Secretariat for Economic Affairs of Switzerland
SEK	Swedish Kronor
Sida	Swedish International Development Agency
SMART	Specific, Measurable, Achievable, Relevant, Time-bound
SME	Small and Medium Sized Enterprises
STDR	Strategic Trade Development Road Map
ToC	Theory of Change
TOR	Terms of Reference
ToT	Training of Trainers

UAEA	Ukrainian Agriculture Export Association
UHBDP	Ukraine Horticulture Business Development Project
UkrSadProm	Association of Gardeners of Ukraine
UkrSadVinProm	Association of Gardeners, Grape Growers and Winemakers of Ukraine
UkrVinProm	Association of Grape growers and Winemakers of Ukraine
UN	United Nations
UNA	Ukrainian Nuts Association
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development organization
UNSDCF	<i>United Nations Sustainable Development Cooperation Framework</i>
USAID	United States Agency for International Development
WFP	World Food Program
WTO	World Trade Organization

Midterm Evaluation of the Linking Ukrainian SMEs in the Fruit and Vegetables Sectors to Global Domestic Markets and Value Chains Phase II Project SYSMT Project at a Glance

The purpose of the midterm evaluation was to assess the project's progress against planned activities and objectives, ensuring accountability; identify lessons learned and recommend adjustments to optimize outcomes in the context of Russia's ongoing war on Ukraine since February 2022. Evaluation insights aim to guide future joint project activities aligned with Sweden's Reform Cooperation Strategy for Eastern Europe 2021-2027.

Key conclusions found the project:

- Relevant at its design and gained more relevance since the war with Russia, aligns with Sweden's Market Systems Development (MSD) Approach and Government Strategies. It contributes to improvements in the regulatory environment and trains more companies than planned. If further funding is available, it would be justified to include more policy advice measures and training of expert-professionals in export promotion sectors.
- Coherent when designed, complementing existing similar development initiatives. The latter became more in number after the war started, but the project is unique in its systemic/sectoral approach.
- Not likely to reach some of its targets, mainly due to the war. However, it trained more companies and people than planned, helped them improve their capacities, and supported more participation in trade fairs than planned. Many companies are likely to report higher employment at the project close. It helped to enhance the capacities of the BSOs, but the progress was slow, due to the war, among other reasons. Some businesses expressed a desire for the project to resume B2B support and support trade missions.
- Efficient, cost effective and the management displayed strong adaptive qualities in the face of adversities, that included the war and the COVID. It could do better in its awareness raising/communication activities, and pursuing synergies.
- Made progress towards the sustainability of its results, but more concerted effort and time is needed.
- Supported women's empowerment, but could do more, including with better monitoring of results. It has undertaken certain measures towards supporting improved ESG and CSR, but there is a need for much more and the need is growing given the EU candidate country status.
- Ensures the application of the "equity" principle in selecting the companies it supports in line with the LNOB principle of the UN.

Recommendations in brief

For the remaining period of the project:

1. Improve the website, especially with success stories; and
2. Establish contacts with the agricultural extension service, and higher educational institutions to raise awareness about the recordings of webinars.

In the case of a potential third phase:

3. Continue Current Strategies for the Nuts, Wine, and F&V sectors, to foster their competitiveness, resilience, development and sustainability.
4. Potential new components, including policy dialogue; training of new local consultants; assistance with the costs of certification; sector-specific trade facilitation interventions to address unique needs and challenges and Trade Missions (e.g. to Sweden and Italy) targeting key markets; development of e-learning tools; and assessments to identify post-war rehabilitation needs
5. For the Wine sector, support wine tourism; assist the Ministry of Agriculture and Food in implementing wine register; support development of marketing and information strategy to brand Wines of Ukraine; support development of Vision and Action plan for wine associations; and training on other value-added products
6. For the Nuts sector, together with the UNA, work with the government to improve the regulatory field related to the nuts sector
7. For the F&V sector, focus on the relocated and new vegetable farmers; deepen BSO support to address sector-specific challenges and facilitate market linkages; implement targeted trade facilitation interventions tailored to the unique needs of the F&V sector; and support training on Deeper processing of F&V and product diversification.
8. Ensure enhanced coordination and outreach, including: closer coordination with partners (other projects) for trade fair participation and market access initiatives; and a more transparent, score-based system for the selection of companies supported financially for trade fair participation; and improved outreach and awareness raising.

EXECUTIVE SUMMARY

[1] Phase II of the Project "*Linking Ukrainian Small and Medium Sized Enterprises (SMEs) in the Fruit and Vegetables (F&V) sectors to the global and Domestic Markets and Value Chains*" was launched on 1 May 2021 for three years until 30 April 2024 (extended until the end of 2024) to maximize impacts achieved in the previous Phase (2016-2020) The project is implemented by the International Trade Center (ITC) and funded by the Swedish International Development Agency (Sida). The budget (Phase II) is SEK 20,003,805, i.e., US\$ 2,348,140.

[2]. During Phase I of the project, it expanded by covering the nuts sector and three (3) additional regions (Dnipropetrovsk, Zaporizhzhya, and Vinnitsa, with the original regions being Kherson, Mykolaiv and Odessa). Phase II of the project included also vine and wine sector, with the caveat that it concentrates on quality and sector development, rather than export promotion (there was a lack of clarity whether Sida could support trade fair participation for this sector when the Project document was being formulated and this was to be clarified by Sida later on, but was not at the time of writing this report). After the start of the war in February 2022, in July 2022, it was decided to open up the project to the whole country.

[3]. The Overall Objective of the Phase II (the project-hereafter) was to continue contributing to enhanced competitiveness and sustained export growth of Ukrainian SMEs in the F&V, nuts and vine and wine sectors. The project has 4 components (Outputs): (1): Roadmap updated and/or developed for selected value chains; (2) Capacities of SMEs strengthened to improve their international competitiveness; (3) Capacities of BSOs strengthened to provide SMEs with relevant business support services; (4) Business linkages created for SMEs to expand sales in both domestic and international markets, in particular in EU

[4]. As initially indicated in Phase II Sida Project Plan (ProDoc- hereafter) and confirmed in the Bilateral Agreement of 1 April 2021 between Sweden, represented by the Swedish Embassy to Ukraine, and ITC, an independent Midterm Evaluation (MTE) was to be conducted after one and a half years of Phase II initiation. The Objectives of the present MTE were the following: (a) to assess the progress achieved by the project against planned activities and towards the objectives that were set at its design stage (accountability perspective); (b) to gauge the learning elements obtained through the project's experience (learning perspective); (c) to recommend making relevant adjustments if necessary and appropriate; and (d) to inform future/new joint project activities in their alignment with the Strategy for Sweden's Reform Cooperation with Eastern Europe for 2021-2027. The MTE followed a mixed method approach, based on triangulation and contribution analysis (62 interviews and an online survey). The main limitation was that the MTE was able to capture only those micro, small and medium -sized enterprises (MSMEs) [NB: since including the vine and wine sector, the project documents refer to MSMEs, rather than SMEs, since many of the companies in this sector are under "micro" category] and BSOs that were accessible, i.e. continued their operations since the war started in 2022. This was almost half of the initial number (some were left in the now occupied territories some seized the operations)

FINDINGS

[5]. *Relevance*. The project was relevant at the time of its design and became even more relevant since the war with Russia started, supporting the MSMEs, exporting F&V and nuts to continue operations and enter new markets. The design of the project was relevant, focusing on the southern Ukraine only at the start given its not large budget. The decision to expand the coverage to the whole of Ukraine was a correct one given that the project “lost” almost half of the companies due to war, as many got destroyed, stopped operations and/or remained in the occupied territories, however, for a project covering four sectors, it would have needed more financing if it got very active in attracting new partner companies; at the moment while every year new companies partner with the project, the project is not reaching the full potential of covering the relevant companies. While the project does not support explicitly exports in the vine and wine sector, there are other development initiatives that cover that gap, utilizing the results of the efforts by the Project in sector development and training of the companies. In terms of the relevance, what is perhaps somewhat less relevant is the approach and resource allocation for the capacity building of the BSOs, as this requires more sustained efforts, more consistent, with clear milestones, plans and monitoring.

[6] The project did not have an explicit component on policy advice, but through the sectoral Roadmaps it affected the improvements in the regulatory environment, especially in the vine and wine sector. This way it is in line with the Sweden’s Market Systems Development Approach, in that it affects more companies than the direct beneficiaries. If the project gets another phase funding this could be made a more explicit part of the project.

[7]. *Coherence*. The project was coherent at the time of its design, complementing the existing, not many, similar development initiatives. The latter became more in number after the war started, but still, the project has its unique features, including systemic/sectoral approach, that includes development of roadmaps strengthening of the BSOs and capacity building of the SMMEs with training and study tours, preparing them for the trade fairs and supporting participation in those.

[8]. *Effectiveness*. It has become evident already in 2022 that not all targets can be met due to the onset of the war and the subsequent occupation and attacks on the focus regions of the project. Despite these challenges, there was a unanimous decision by the Project Steering Committee (PSC) in 2022, with the donor in attendance, to continue the efforts to bolster the morale of businesses, maintain operations, and preserve contacts. This decision was made with the understanding that ceasing operations could result in significant costs and have a devastating negative impact. While the project is not likely to reach some of its targets, the reasons are mainly external, with the war being the key one. The project has however trained many more companies and people than planned, has helped them improve their capacities and supported more than planned with the participation in the trade fairs. While figures on the impact on the volumes of export will be available at the end of the project only, the interviews and survey conducted for this MTE indicate that most of the partner companies were successful in that. The project has helped to enhance the capacities of the BSOs too (e.g. with ITC tools), but here the progress was slow and slower than expected by design, again affected by the war, among other reasons. The Ukrainian Nuts Association (UNA) is the case

of successful capacity building as it is working towards professionalization, having its mission, vision and Action Plan developed with the support from the project. The other two key partner BSOs (UkrSadVinProm and the Ukrainian Agricultural Export Association) while have improved, still have a way to go towards becoming the truly legacy institutions for the project. UkrSadVinProm, together with smaller associations in the wine and vine sector (the Association of Craft Winemakers of Ukraine and the Association of Craft Winemakers of the Black Sea Region) together with the All- Ukrainian Chamber of Commerce and Industry (CCI), using the Roadmap, were successful in achieving changes in the regulatory environment that helped with the increased export to the EU countries due to improvement in quality and skills.

[9]. None of the partner sectoral associations covers vegetables sector, and most of the companies specializing in this were left in the occupied territories. If the project gets further support, this should be one of the areas to focus on

[10]. The project has put a lot of emphasis (and larger share of financial resources than planned) on supporting participation of the companies in trade fairs: this is what was appreciated most by the companies and was, overall, justified. But the project could try and design a system of varied contribution by the companies towards the costs: currently all of them get full support with the cost of the booths/pavilion, even the very experienced ones that have 6-7 years of cooperation history with the project and large clients (importers) list. There are technical difficulties in doing this, but potentially solvable.

[11]. The project arranged for Business-to -Business (B2B) support during the trade fairs in the beginning of Phase II, but then stopped due to the high associated costs. But this, as well as trade missions have been mentioned as needed in the interviews for the report, and if the project receives further funding, is something to engage in.

[12]. *Efficiency*. The project has been efficient, cost effective and the management displayed strong adaptive qualities in the face of adversities, that included the war and the COVID. There was also restructuring in the government with the Ministry of Agrarian Policy and Food of Ukraine (MAPFU) being part of the Ministry of Economic Development and Trade of Ukraine (MEDTU) at the start of the Phase II and then separating just before the start of Phase II. The project could do better in its awareness raising/communication activities. While the project has synergies with a few other development initiatives, there are others that could be explored. The project could have done much better in terms of capturing and sharing success stories.

[13]. *Potential for sustainability*. The project has made progress towards the sustainability of its results. Trained businesses and BSOs are the important building blocks in that. There are national initiatives that take companies to trade fairs (by All-Ukrainian CCI, Entrepreneurship and Export Promotion Office (EEPO) and private initiatives, and some of the companies that partner with the project had also been using those opportunities, although it should be noted that those operate on full cost-recovery basis, especially those organized by the All-Ukrainian CCI and so this is not affordable for the SMEs at the start of their exporting journey. The main concerns about sustainability lie with the BSOs, especially sectoral associations, as very few of them that provide valuable services for their members, especially on a financially sustainable basis, and changing this situation requires more time and effort and even then, there would

be risks to sustainability. What the project could have done, is to find a better use for the recordings of the webinars ensuring their wider distribution and having several "homes". What the project could do, if there is further funding available, is have some activities (internship and study abroad courses) to help fill the gap with local experts, that is there currently

[14]. *Emergent Impact*. The interviews indicated that the project is having an impact not only in terms of experts' growth but also growth in employment. In fact, in the current circumstances even maintaining the workforce is an achievement. Data would be available only towards the end of the project however.

[15]. *Cross-Cutting*. The project has undertaken certain measures towards supporting improved environmental and social governance (ESG) and Corporate Social Responsibility (CSR), but there is a need for much more and the need is growing given the EU candidate country status. While the project had several training courses on waste' recycling and more ecologically friendly methods of production, as well as supporting companies getting Global G.A.P (Good Agricultural Practices) and HACCP (Hazard Analysis & Critical Control Point) certifications with training, if there is more funding available, it could expand this with topics on circularity, nature- based solutions (NBS), green operations, CSR, etc.

[16]. The project had measures to support women's empowerment, but could do more with better monitoring of results (e.g. in terms of impact on career progression). 9 out of 46 SMEs reporting improved international competitiveness were women-owned; and 2 out of 12 SMEs that have transacted international business were women- owned. The project involved 36 percent of women in training. It has organized one training event on e-commerce with the Rural Business Women Union There could be more efforts in this direction with other such unions and other related topics. While the project trained young people engaged in three of the partner companies, there was no overall approach developed. As for the human rights, no specific contribution could be mentioned, except that, the online modules covered such issues as workers' comfort and safety

[17]. With its approach, the project ensures that there is a balance between continued support of the companies which have been with the project for several years and are getting stronger year on year, and the companies that are export ready but only on the beginning of the exporting, and are relatively smaller. This way the project ensures the application of the principle of "equity", in line with the Leave no one Behind (LNOB) principle of the United Nations (UN). The project, indirectly, contributes also to the improvements in the livelihoods of the poor and marginalized: with the support to IDPs (as many companies employ them) and disabled (becoming stronger the companies have to, by law, ensure having disabled on the staff).

CONCLUSIONS

- The project *was relevant* at the time of its design and became even more relevant since the war with Russia started, but then the budget was small for the enlarged scope. Through the contribution to the improvements in the regulatory environment, as well as due to training of many more companies than planned, it is in line with the Sweden's Market Systems Development Approach. The project is also in line with the

Government Strategies. The project design was relevant; if there is further funding it would be justified to include more measures related to policy advice, and training of expert-professionals in the sectors of engagement with practical knowledge of export promotion.

- The project *was coherent* at the time of its design, complementing the existing, not many, similar development initiatives. The latter became more in number after the war started, but still, the project is unique in its systemic/sectoral approach.
- While *the project is not likely to reach some of its targets, the reasons are mainly external*, with the war being the key one. The project has however trained many more companies and people, than planned, has helped them improve their capacities and supported more than was planned with the participation in the trade fairs. Many companies are likely to report also higher employment at the project close. The project has helped to enhance the capacities of the BSOs too, but here the progress was slow, again affected by the war, among other reasons. There was a desire by the interviewed businesses to for the project to resume B2B support and for it to support trade missions.
- The project has been *efficient, cost effective and the management displayed strong adaptive qualities* in the face of adversities, that included, *inter alia*, the war and the COVID. The project could do better in its awareness raising/communication activities (including capturing and sharing success stories) and pursuing synergies.
- The project has made *progress towards the sustainability of its results, but more concerted effort (and time) is needed*.
- The project has undertaken certain *measures towards supporting improved ESG and CSR, but there is a need for much more and the need is growing given the EU candidate country status*. The project had *supported women's empowerment*, but could do more, including with better monitoring of results.
- The project ensures the *application of the "equity" principle in selecting the companies it supports* in line with the LNOB principle of the UN.

LESSONS LEARNED

- flexible design of the project has proved to be very important in the face of the war that erupted and COVID;
- Roadmaps, study tours, training on the topics with wide coverage, individual advisory support to companies, support with trade fair participation, including preparation- all of these together for a logical systemic sectoral approach has proved to be effective and valued by the businesses. But the elements on policy dialogue, which are currently tackled through the roadmaps could be added in the future if there is further funding.
- Companies in the east, in the close proximity to the front line, need other type of assistance too, e.g. cofinancing for equipment, affordable loans, cost covering for certification, etc.
- The project approach to involve the representatives of state bodies in study tours proved effective in tackling regulatory challenges.
- Market linkage events are seen by businesses as the most fruitful activity organized by the project, hence the need to continue and further intensify presence at trade fairs and

organize continuous buyer-seller B2B meetings. There are companies with varying degrees of need for the coverage of their share of the costs with the booths, and some of them are not SMEs.

- Association building requires time, specialized knowledge and carefully designed approach.
- active involvement of local BSOs and national consultants in the implementation of the project activities contributes to enhancing local capacities, ensuring local ownership and sustainability of project results;
- Companies achieve better results when they are strongly committed and ready to invest time and money in long-term ties with foreign markets

RECOMMENDATIONS

(A) In the remaining period:

1. Improve the website, especially with success stories; and
2. Establish contacts with the agricultural extension service, higher educational institutions and alike, to raise awareness about the recordings of webinars.

(B) Potential 3rd phase:

1. **Continuity of Current Strategies** for the Nuts, Wine, and F&V sectors, would be important to foster their competitiveness, resilience, development and sustainability. It is recommended that the proposed 3rd phase includes, *inter alia*, the same components as in Phase 2, namely
 - i. development and update Roadmaps for all subsectors;
 - ii. training, study tours and direct advisory support, ensuring the coverage of aspects on environmental sustainability, circularity, and CSR;
 - iii. deepening support to BSOs to enhance their capacity in providing relevant services to stakeholders; and
 - iv. strengthening market linkages with new markets (in addition to the EU and Middle East), involving more SMEs and including digital presence enhancement and continued support for trade fair participation (with, potentially, a variable approach to experienced companies with longer than 4/5 years of export history with the project), investigating the option of trade fair participation for the wineries too.
2. **Potential new components**, including:
 - i. policy dialogue, especially related to trade simplification for targeted products to targeted markets;
 - ii. support to training of new cadre of local consultants – with an internship program and study abroad courses,
 - iii. assistance with the costs of certification for the companies in the east (near the frontline);
 - iv. sector-specific trade facilitation interventions to address the unique needs and challenges of the Nuts, Wine, and F&V sectors and Trade Missions (e.g.

- to Sweden and Italy) targeting key markets and facilitating interactions with buyers and industry stakeholders and study tours;
- v. development of e-learning tools; and
- vi. assessments to identify post-war rehabilitation needs

3. In the potential 3rd phase, Sector-Specific Recommendations include:

a. **Wine sector**, *inter alia*

- i. support wine tourism as a part of development of rural areas;
- ii. assist the Ministry of Agriculture and Food in implementing wine register as a part of EU integration;
- iii. support the development of marketing and information strategy for the brand Wines of Ukraine;
- iv. support the Laboratory with training;
- v. support the development of Vision and Action plan for wine associations as well as service portfolio; and
- vi. training on other value-added products from the grapes and diversification

b. **Nuts sector**, *inter alia*, together with the UNA, work with the government to improve the regulatory field related to the nuts sector

c. **F&V sector**, *inter alia*,

- i. focus on the relocated and new vegetable sector farmers
- ii. deepen BSO support to address sector-specific challenges and facilitate market linkages;
- iii. implement targeted trade facilitation interventions tailored to the unique needs of the F&V sector; and
- iv. support training on Deeper processing of F&V and product diversification

4. In the potential 3rd phase the project should ensure enhanced coordination and outreach, including:

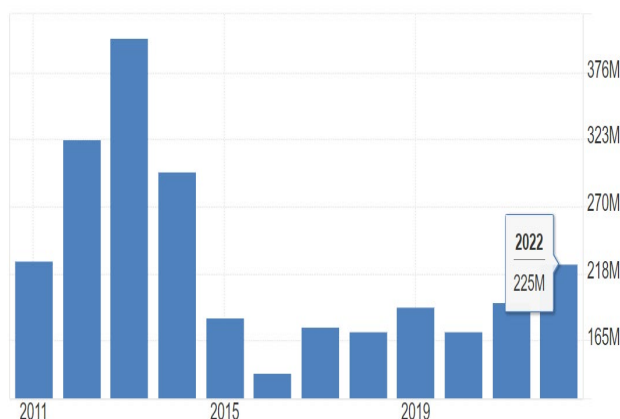
- a. closer coordination with partners (other projects) for trade fair participation and market access initiatives;
- b. a more transparent, score-based system for the selection of companies supported financially for trade fair participation; and
- c. improved outreach and awareness raising, using other associations as vehicles for that, LinkedIn and Instagram and an improved website (with success stories and analytical materials).

1. INTRODUCTION

1.1. BACKGROUND AND CONTEXT

1. Agricultural products are Ukraine's most important exports. In 2021 they totaled US\$27.8 billion, accounting for 41 percent of the country's US\$68 billion exports. Ukraine is normally the world's top producer of sunflower meal, oil, and seed and the world's top exporter of sunflower meal and oil. But there is also significant potential for fruits and vegetables (F&V) and nuts: for these exports reached US\$225.17 Million during 2022, according to the United Nations (UN) COMTRADE database on international trade,¹ after a boost in 2020 following a decline that followed the Russian ban in 2016 (see Figure 1).

Figure 2: Value of Ukraine Exports of vegetable, fruit, nut food preparations 2022



<https://tradingeconomics.com/ukraine/exports/vegetable-fruit-nut-food-preparations>

2. Over the recent past, Ukraine has been struggling under the weight of a protracted conflict with Russia, that began in February 2014 with the covert invasion of the Ukrainian Autonomous Republic of Crimea by disguised Russian troops. The conflict expanded in April 2014 when Russian and local proxy forces seized territory in Ukraine's Donbass region; over the next seven years, more than 14,000 people would be killed in fighting in eastern Ukraine. In February 2022 Russia invaded Ukraine: at the time of writing this report, parts of Ukraine were occupied by Russia, including parts of Donetsk, Kherson, Luhansk, Mykolayiv, and Zaporizhzhya Oblasts (see Figure 2). This has caused geographic fragmentation, emigration and internal

Figure 1: Russian controlled territories in Ukraine, 10/2023



Source: The Economist

¹ <https://tradingeconomics.com/ukraine/exports/vegetable-fruit-nut-food-preparations>

displacement. Under these circumstances, the economic crisis that has gripped the country since at least 2012 has deteriorated.

3. In response to requests for assistance from central and regional Ukrainian authorities as well as from business partners, the International Trade Center (ITC) undertook a series of needs assessment visits, and comprehensive consultations with, private and public sector stakeholders in Ukraine in 2013, 2014 and 2015². As a result, it assessed trade constraints faced by businesses, in particular Small and Medium Size Enterprises (SMEs)³, and identified the scope and focus of the Phase I of the project, namely on the F&V sectors in the three southern regions of Ukraine: Kherson, Mykolaiv and Odessa. These regions were selected for the following reasons: (a) their strong potential for agribusiness product exports, in particular F&Vs (fresh and processed); (b) the commitment demonstrated by local stakeholders and their strong local ownership; (c) proximity to seaports; and (d) likelihood of significant social impact. Therefore, the project has been designed to help Ukrainian SMEs in the F&V sectors to integrate into domestic and global value chains and to access new markets by assisting SMEs to produce goods following market requirements, improving the capacities of business support organizations (BSOs) to provide quality business support services to SMEs, and linking SMEs to target markets, with a focus on the EU. The target sub-sectors/product groups within the F&V sectors for each region were selected based on the comprehensive stakeholder consultations during the project's Inception Phase. Specific technical assistance solutions for each selected sub-sector/product group were designed based on the needs of each region as well as the requirements of the target markets, which were determined during a value-chain analysis of each target sub-sector/product group. Phase I was organized around the following four outputs: (1) Roadmaps developed for selected value chains in the F&V sector; (2) capacities of SMEs strengthened to improve international competitiveness, including building up their competencies in sourcing, production, packaging, logistics, trade information, market analysis, quality management, certification procedures, and sector-specific marketing and sales; (3) capacities of BSOs strengthened in different sector-specific business areas (including trade information services, market development, quality management, certification procedures, supply chain management, and buyer and investor communication, to provide SMEs with relevant business support services and by supporting their integration into international networks to facilitate knowledge transfer; and (4) business linkages created for SMEs to expand sales in both domestic and international markets, in particular the European Union (EU). Funded by the Swedish Government, via the Swedish Embassy to Ukraine, and the ITC, the project's Phase I was implemented from 1 January 2016 to 30 April 2021.

4. During Phase I, in 2018, project, the project expanded to 3 more regions (Dnipro⁴, Vinnitsa and Zaporizhzhya). In 2019, nuts sector was added to the project. Both were prompted by the requests from the BSOs and continuing assessment of the needs and both decisions were taken by the Project Steering Committee (PSC). The overall budget was Swedish Kronor (SEK) 22,715,000, including the ITC contribution of US\$120,000, i.e., US\$ 2,576,427.76, for Phase I.

² From October 2013 to June 2015, the ITC conducted several needs assessment visits, i.e., October 2013: Kyiv and Kherson; October 2014: Kyiv and Lviv; April 2015: Kyiv; May-June 2015: Kyiv, Odessa, Kherson and Mykolaiv.

³ The project uses the EU definition. It uses the same classification as the EU: not more than 50 million in turnover per year and not more than 200 permanent staff employees

⁴ The former name was Dnepropetrovsk

5. In 2018 the project conducted an internal midterm review (MTR). It concluded that: the Project was relevant for the southern regions of Ukraine, with a relevant design and logframe, in line with the Strategic Trade Development Road Map (STDR) 2017 – 2021 of the Government of Ukraine, connected with other international initiatives and well managed. It also concluded that the pilot SMEs (19 at the time from Kherson, Odessa and Mykolaiv regions) were likely to achieve the targets on enhanced competitiveness and internationalization in the F&V sector, but that the identified BSOs were weak (as was indicated in the project developed Roadmap as well) and not yet equipped to develop themselves into export related service organizations during the remaining time of the project, posing a risk to sustainability and that further capacity building for the latter was needed to be focused on improved service portfolio and organizational capacities to be able to facilitate SMEs in export development and promotion, coupled with better dissemination and sustainable accessibility of the training material and best practices, as well as connecting to national organizations from this perspective. And finally, it highlighted that the results framework lacked impact level targets. These points were acted upon.

6. Phase II was launched on 1 May 2021 for three years until 30 April 2024 (now extended until the end of 2024) to maximize impacts achieved in the previous Phase (2016-2020), including vine and wine sector, with a budget of SEK 20,003,805, i.e., US\$ 2,348,140. After the start of the war in February 2022, in July 2022, it was decided to open up the project to the whole country, since the project "lost" more than half of the companies it was working with: they either stopped operating, stayed in the occupied territory or relocated. There was no terminal evaluation of the Phase I. The present Midterm Evaluation (MTE) focuses exclusively on Phase II. For a summary description of Phase II, see Sections 2.1

1.2. PURPOSE, OBJECTIVES AND THE SCOPE OF THE MIDTERM EVALUATION

7. As indicated in Phase II Project Plan (referred to a Project Document (ProDoc) hereafter) and confirmed in the Bilateral Agreement of 1 April 2021 between Sweden, represented by the Swedish Embassy to Ukraine, and ITC, an independent MTE was to be conducted after one and a half years of Phase II initiation.

8. The Objectives of the present MTE are:
- To assess the progress achieved by the project against planned activities and towards the objectives that were set at its design stage (accountability perspective);
 - To gauge the learning obtained through the project's;
 - To recommend making relevant adjustments if necessary and appropriate to the project's activities during the remaining time of its life cycle to maximize its chances of fulfilling its objectives in the new context resulting from Russia's war on Ukraine ongoing since 24 February 2022; and
 - To inform future/new joint project activities in their alignment with the Strategy for Sweden's Reform Cooperation with Eastern Europe for 2021-2027

9. To achieve these objectives, the MTE was to ensure the following:

- To follow a forward-looking approach, including the potential next phase of the project (Phase III) to maximize the scale and the sustainability of results within the current conflict context and to enhance ITC’s ability to better support pro-poor market systems developments in Ukraine’s agricultural sectors by supporting these in pivoting/reconnecting to international value chains (see [Annex 2: TOR](#)), including a possible enlargement of the portfolio, to overcome the multiple and new external challenges faced by the beneficiary agricultural sectors;
- To pay particular attention to the soundness of indicators and targets, the relevance of baselines established at the inception of the project to assess beneficiaries’ conditions, and the means of verification used to gather and validate results;
- To examine the due implementation of results-based management (RBM) methods throughout the project and, in alignment with those good practices and disciplines, the ability of the Project Team for real-time management and sound decision-making (including at the local level);⁵ and
- To examine Phase II responsiveness to incorporating the lessons learned (identifying what worked and what did not in terms of activities, outputs, and outcomes).

10. The main intended user of this MTE is the funder, namely the Swedish government, via its Embassy to Ukraine and Swedish International Development Agency (Sida). The list of other intended users of this MTE include: Project management teams at ITC Headquarter (HQ) and in Ukraine; the PSC; ITC management and staff; and the wider community of ITC stakeholders interested in learning more about ITC interventions or the project under evaluation scrutiny.

11. The *thematic scope* of the present MTE covers all Phase II activities, results achieved, and lessons learned from the project at midterm. The evaluation *time scope covers* Phase II entire implementation period from 1 April 2021⁶ up to, and including 31 December 2023, [initially it was 31 March 2023, but due to certain implementation challenges of the MTE⁷, the timeframe for the MTE was extended]. The *geographic scope* of the MTE covers the whole territory of Ukraine at the time of writing this report, but focusing on 6 regions until July 2022 (Kherson, Mykolaiv, Odesa, Dnipro, Zaporizhzhia, and Vinnytsia).

⁵ Sida has mainstreamed an “Inclusive Market Systems Development approach” across its portfolio, encouraging all contributions to consider these aspects of sustainability. It emphasizes that as a tool for accountability, RBM should be used to inform ongoing learning and adaptation, e.g., by applying the Donor Committee for Enterprise Development (DCED) Standard for Results Measurement. The DCED Standard is a framework that helps projects formulate hypotheses and set indicators that are monitored regularly to demonstrate whether events occur according to plan

⁶ Phase II’s field implementation activities started in May 2021.

⁷ The consultant who was hired initially for the MTE, discontinued his work after the Inception stage, and a new consultant was hired.

1.3. METHODOLOGY

12. The MTE follows ITC Evaluation Guidance (2018), the Evaluation Handbook: guidelines and Criteria for Conducting Evaluations at Sida (2020), and the Organization of Economic Cooperation and Development (OECD) Development Assistance Committee (DAC) Revised Evaluation Criteria (2019).

13. Close consultations with the ITC project management team as the implementing partner was maintained. Several consultations took place regularly throughout the evaluation process to ensure the robustness of the data collected and to steer the analysis as necessary, through the provision of informative insights.

14. The key evaluation questions, modified in the Inception phase, are presented in [Table 1](#).

Table 1: Evaluation criteria and Questions

No	Evaluation Criteria and questions
Relevance	
1	Did the project respond to the correctly identified business environment constraints in line with its ability? Have the analyses and ongoing monitoring influenced decision-making and shaped activities?
2	What is the relevance of the project’s approach risk management plan within the current context?
3	To what extent did the midterm evaluation of Phase I, including its lessons learned and recommendations, inform the design of the Phase II project?
4	What are the strengths and weaknesses related to project design, in particular the project’s Logical Framework, Theory of Change (ToC) and the further development of it into operational results chains for the achievement of inclusive and sustainable trade? What can be learned to better align the project objectives and ToC to the Strategy for Sweden’s reform cooperation with Eastern Europe for 2021-2027, in particular elements related to inclusive economic development?
5	How is the project thinking about, and supporting, resilience (including the ability of newly exporting MSMEs to maintain/grow their exports)?
6	Are the inputs adequate for achieving the planned results and intended outcome?
7	How have in-country stakeholders, including the private sector been involved in project design, inception and implementation?
Coherence	
8	Regarding internal coherence, what is the level of compliance of the project with the strategic objectives of ITC ((ITC core services and impact areas as set out in ITC’s Strategic Plan 2022-2025) and the Swedish Embassy in Ukraine? What is the ability of project’s management to establish synergies and interlinkages with relevant interventions of ITC and the Swedish Embassy in Ukraine?
Effectiveness	
9	How well has the project taken advantage of the lessons learned and recommendations of the midterm evaluation of Phase I to optimize its effectiveness?
10	To what extent has the project achieved, or is expected to achieve, its objectives, and its attributable results along the causal pathway, including any differential results across sectors and regions in the country? Can the results be distributed across different groups? What are the implications for continuation?
11	How performant is the project’s monitoring system?

No	Evaluation Criteria and questions
12	What is the effectiveness and efficiency of project management and partners in implementing and adapting the project to evolving challenges? Under the current circumstances of the war in Ukraine, what is its impact on the project towards reaching its outcomes? What possible adaptations and risk mitigations can be proposed, based on different evaluable scenarios?
13	To what extent has the project contributed to improved competitiveness and internationalization of MSMEs and the performance of BSOs' to provide relevant services to enterprises? (Particular attention to be devoted to the project's potential to promote stronger competitive ties with the EU.)
14	How is the project analyzing and addressing, where needed, access to finance bottlenecks for partner MSMEs (to build or sustain exports)? Similarly, regarding partnerships or workstreams that have been closed earlier than expected, what can be learned from these experiences for the future?
Efficiency	
15	Are the project implementation mechanisms appropriate to achieve planned outputs and contribute to project outcomes? Are the project approach and indicators still valid, or are improvements necessary?
16	Do feasible alternatives exist that can deliver similar results with the same resource? (Note that before cost-effectiveness comparisons can be made, alternatives must be identified that are genuinely feasible and comparable in terms of quality and results.)
17	In comparison to other work in similar sectors, how does the project's impact achieved so far compare for the amount of money spent?
18	How does the cost for key inputs, including the use of consultants, relate to appropriate comparators? Is the number, expertise, and structure of staffing and the relationship to ITC and the national and HQ levels adequate?
19	Is the spending in line with the project budget?
20	Has the project encountered any delays and was the planning revised accordingly?
21	Does the project have adequate communication plan and products? How visible is the project?
22	In terms of resource mobilization and use, is there evidence of partnerships with entities with complementary strengths to coordinate resources for joint objectives?
23	What other synergies or possible overlaps have been observed, or forward-looking synergies could be developed in the future, with other related – most notably UN managed – programmes and capacities? What are the strengths of partnerships within the UN family (engagement with UN Resident Coordinator offices [RCO]; participation in the UNSDCF and CCA, in joint programming and M&E) as well as potentially with WTO and other partners?
Potential impact	
24	Is the project likely to achieve its planned objectives upon completion, in particular in terms of expected benefits for ultimate beneficiaries (impact-level)? What is the likelihood that the project will contribute to the broader and longer-term national development impact?
25	What is the likelihood that the project will contribute towards international commitments set out in the Sustainable Development Goals (SDG) 2030 Agenda, particularly SDG 5 "gender equality", SDG 8 "promoting sustained, inclusive and sustainable economic growth, full and productive employment", SDG 9 "industry, innovation and infrastructure", and SDG 12 "responsible consumption and production"?
26	At midterm, can any unintended positive or negative effects already be observed as a consequence of the project's interventions?
27	What is the most and least valuable type of support offered by the project? Why?
Sustainability	
28	How effective has the project been in establishing national ownership?
29	Are the project results likely to be durable and anchored in national institutions? Are government and related national institutions likely to maintain the project financially once external funding ends? Will access to the benefits generated by the intervention be affordable for the beneficiaries over the long term? Are national partners able, willing, and committed to continue building on the systems enhanced by the project?
30	Has the project prepared for an exit plan to ensure a proper hand-over to the national government and institutions after the project ends? Under the current circumstances of the war in Ukraine, what possible exit strategies can be proposed, based on different evaluable scenarios?
31	Does the project increase resilience to shocks (by addressing specific dimensions of fragility and their root causes)?

No	Evaluation Criteria and questions
32	How does the project measure progress towards sustainability and scale, achievements and lessons learned to date?
33	What options exist for possible support to MSMEs to facilitate access to finance (investor engagement, accessing working capital, etc.)?
34	How will the impacts and the mechanisms to achieve these impacts continue after funding for the project has ended so that more and more people will continue to benefit from the intervention?
Cross cutting	
35	To what extent does the project contribute towards cross-cutting issues including human rights and gender equality (human rights, democracy, the rule of law and gender equality); inclusion of youth (peaceful and inclusive societies); green growth (environmentally and climate-resilient sustainable development and sustainable use of natural resources); and social responsibility (inclusive and economic development)?

15. The methodology was based on triangulation of evidence collected through various sources and contribution analysis. It was designed as a mixed methods evaluation, using both quantitative and qualitative analysis. The sources of information included:

- **Desk review.** The MTE drew on a significant amount of primary and secondary documentation, which was categorized and systematically analysed using standard qualitative quoting techniques. The list of documents included: Sida policy, normative and programming documents, e.g., Agreements and their Addenda; economic reform papers and strategies for Ukraine; the previous MTR for Phase I; and annual and final implementation reports for Phase II; PSC reports; trade fair participation reports; feasibility studies; needs assessments; impact assessments; gap analyses; training validation reports; etc. This also included analysis of data extracted from the ITC Project Team’s database;
- **Online survey.** ITC survey tool was used to gather the key information in line with the evaluation questions and focus on beneficiaries. All *accessible* BSOs (Chambers of Commerce and Industry (CCI) and Sectoral Associations) received it. The term “accessible” here is used to describe those that continued their operations after the war. Thus 35 in total, including 28 SMEs and 7 BSOs. The response rate was low- 16 only (the e-Survey questionnaire is presented in [Annex 9: Online Survey Questionnaire](#)). The majority of those receiving the online survey tool were also interviewed in person or remotely;
- **Key Informant Interviews (KIIs):** Overall, 62 persons were interviewed (see [Table 2](#) and [Annex 8: List of Persons Interviewed](#)). The 23 micro, small and medium sized enterprises (MSMEs⁸) that were interviewed were mostly those that had received a *comprehensive package of assistance*⁹ going beyond their participation in webinars, but there were exceptions from this to ensure coverage of all the subsectors. Out of 28

⁸ Phase II covered also micro enterprises (vine and wine sector)

⁹ a single company received support in several key areas vital for enhancing their market presence. These areas encompass: (1) Market research techniques; (2) Trade fair preparation strategies; (3) Development of marketing materials (including logos, catalogues, brochures, etc.); (4) Creation of an individualized export action plan; (5) Assistance with the implementation of international food safety standards (such as GlobalG.A.P. and HACCP); (6) Enhancement of production techniques.; (7) Addressing post-harvest and other production-related issues; (8) Assistance in organizing B2B meetings; and (9) Participation in trade fairs.

accessible MSMEs, 11 represented the vine and wine; 5- nuts sector, and the remaining 12 -F&V sector. Out of 28 accessible MSMEs 20 had received comprehensive assistance. The 23 interviewed MSMEs represented similar distribution (5 vine and wine (but 8 in fact, since 3 more were counted under BSOs); 5 nuts sectors, and 13- F&V. The slight skewing was necessary to ensure that there is also good coverage of both the companies that were with the project since Phase I and the newer ones. Questionnaires used as a semi-structured interview guides were formulated separately for each of the respondent categories. These guides were used flexibly, making sure that opportunities for further probing were seized and that the key informants were not constrained by a rigid structure.

- ✓ **In person interviews** (9): The Evaluator attended Gulfood 2024 from 19 to 23 February 2024., for an opportunity to collect data, to triangulate the information collected and to follow up on the information already collected. Also, the Project Coordinator and the National Project Manager (NPM) were interviewed in person;
 - ✓ **Remote interviews** (53), with the representatives of the state institutions, project staff, other ITC staff and projects, almost all national and international consultants, representatives of MSMEs and BSOs and other development initiatives active in Ukraine, etc.
- **Case studies:** several case studies from which to derive lessons learned and good practices. The criteria included: diversity of financial support; thematic diversity; complementarity; the potential to highlight successes and/or challenges and other cases with a high potential for learning.

16. The logical framework matrix (in [Annex 2: TOR](#)) with Project Indicators was reviewed comparing the targets with the self-reported results, verified further through interviews and document review. It was also analyzed to determine the extent to which the indicators are Specific, Measurable, Achievable, Relevant, Time-bound (SMART).

17. Sex- and age-disaggregated data were reviewed via existing Logframe and other project documentation and field interviews.

18. Qualitative information was transcribed and coded manually following the interviews. No advanced statistical modelling was foreseen for this assignment. Some quantitative data analysis was needed to assess some of the indicators/answer evaluation questions. The process information arising from these was utilized to compare and contrast findings and check for (in)consistencies.

19. [Table 2](#) presents the sample for interviews and the online survey.

Table 2: Sample frame and size

Category	Overall Number	Accessible	in-depth assistance	Online survey - Responses received	Interviewees
SMEs	74	28	20	11	23 (including 7 face-to-face during Gulfood 2024 in Dubai)
BSOs	15	7	8	5	10
CCIs		5	2	4	2
Associations		10	5	5	3
State institutions	3	1			4 remote
Project staff/ITC					5 (3 remote)
Local experts	7				4 remote
International experts	9				4 remote
Sida					2 remote
Development partners					7 remote
Other					3 (1 in person)
		35		16 (out of 34 recipients)	62 (including 11 in-person)

20. The main limitations include:

- The war in Ukraine meant that many of the stakeholders were not accessible. Hence the sample for interviews was drawn from those that were accessible, limiting the size. From the overall number of (a) 74 SMEs, only 28 (slightly more than a third) were accessible (i.e. continued their operation after the eruption of the war); and (b) from the overall number of 15 BSOs, only 7 were accessible. Having said that all efforts were put in place to ensure that the sample of the SMEs from which feedback was sought covered variety of locations and sectors;
- The war in Ukraine meant also that the evaluator could not visit Ukraine and meet some of the company representatives and BSO leads at their premises. In person meetings and interviews happened only at the Trade Fair in Dubai in February 2024;
- The response rate for the online survey was low, and so the charts that are based on it, need to be treated with caution; and
- Assessment of cost effectiveness and cost efficiency was done in a light touch manner: doing this rigorously requires significant amount of resources and time and would amount to an entire research exercise.

2. DESCRIPTION OF THE PROJECT

2.1. PROJECT DESIGN

21. The Overall Objective of the Phase II project on “*Linking Ukrainian SMEs in the F&V sectors to global and domestic markets and value chains*” (2021-2024) (the project or Phase II project – hereafter), was to continue contributing to enhanced competitiveness and sustained export growth of Ukrainian MSMEs in the F&V, nuts and vine and wine sectors. The Specific Objectives of Phase II were to maximize the impact of the results achieved in Phase I by including the vine and wine sector in the project scope, but with a caveat, that it would not support export promotion related activities. In the 1st phase when the work on the Concept note was carried out there was a clarification from Sida that such activities cannot be supported (e.g. wine trade fairs). In achieving its long-term objective, Phase II foresaw the following:

- To assist MSMEs from the F&V sectors, including nuts, in producing goods according to market requirements by linking pilot MSMEs to target markets, particularly in the EU;
- To provide support to Ukraine’s vine and wine sector by focusing on quality and production, helping sectoral representatives to adopt a strategic sectoral development approach; and
- To improve BSO capacities in providing quality services to MSMEs.

22. At the end of Phase I, the project was operating with 15 BSOs, including regional CCIs and business associations. At the Government level, the project has helped local authorities (e.g., regional administrations) and the Enterprise and Export Promotion Office of Ukraine (EEPO) to improve dialogue with the private sector and better understand their needs, as well as to improve awareness of global trends in the F&V sector. During Phase II, to further advance export potential to developed markets, the project aimed to continue generating a high level of commitment and willingness to collaborate at the three intervention levels: MSMEs, BSOs and the Government, to ensure the establishment of a long-term conducive business environment.

23. Phase I of the “*Linking Ukrainian SMEs in the F&V sectors to global and domestic markets and value chains*” project (2016-2021) proved to be successful, accumulated valuable experience and lessons learned and led to several tangible results at each of the three targeted levels: SMEs, BSOs and Government, based on the self report (the Phase I Project Completion Report) and the Report on Study of Produce Growing and processing Companies (ITC, 2020). In particular, the latter found that:

- There has been an almost 25 percent increase in the number of surveyed producers and a fourfold increase in the number of processors, compared to 2016;
- There was a growth in the number of female personnel and middle managers in the surveyed companies is worth mentioning;

- More than 50 percent of respondents started exporting as a result of cooperation with the project. Since the beginning of the project, export has refocused from the CIS market to the EU and other foreign markets without sales loss;
- There was an increased number of companies with a strategic development plan for the next 3- 5 years. The number of respondents curious about the EU markets and their requirements decreased from 60 to 23 percent, potentially indicating increased awareness of international market requirements as a result of trainings, business missions, B2B (business-to business) meetings and participation in international events;
- In 2016, only 15 percent of companies had experience of cooperation with international BSOs, whereas the number of such companies doubled in 2020;
- Project's experts and consultants helped the companies prepare to GLOBALG.A.P.¹⁰ and Hazard Analysis and Critical Control Points (HACCP) certification; developed individual export strategies and assisted in implementing thereof; organized individual consultations and supported pilot companies during the trade fairs and business missions abroad. The pilot companies had higher performance indicators in key areas compared to other companies interviewed, e.g.:
 - a) 43 percent of the surveyed companies participated in trade fairs, compared to 89 percent for pilot companies;
 - b) the average number of independent exporters, dealing without intermediaries, was 43 percent, compared to 62 percent for pilot companies, which might have been because the latter participated in trade fairs, where they had an opportunity to make contacts with foreign partners;
 - c) while outburst of sales for pilot companies was registered in 2017-2019 similar to most surveyed enterprises, more than 50 percent of the surveyed companies started exporting during that period;
 - d) 89 percent of pilot companies were well aware of requirements of foreign buyers, while an average figure for other companies was only 46 percent, most likely due to direct communication with importers and better awareness of the requirements among pilot enterprises, since their representatives regularly participated in trainings and workshops;
 - e) the percentage of women among managerial employees (middle managers) in pilot companies amounted to 78 percent, which exceeded the average figure of 47 percent;
 - f) export sales have shown an upward trend, but these were pilot enterprises that noted an overall sales growth of 35 percent (kg), including export growth of 55 percent (kg) and increase of export to the EU countries of 73 percent (an average growth for all companies is about 20 percent); and
 - g) 42 percent of pilot companies and only 17 percent of other companies indicated availability of certificates, and the higher rate for the pilot companies was likely due to the support and constant interaction with the project.

¹⁰ Globa; Agricultural Practices, <https://www.globalgap.org/>

24. However, only 40 percent of employees improved their sales skills which might have been due to the lack of understanding, of how important a quality marketing department is.

25. Phase II, which was designed as a continuation of Phase I funded by the Swedish Embassy to Ukraine and implemented by the ITC followed essentially the same approach. The project’s direct beneficiaries included MSMEs from the selected value chains, local and sector BSOs, and related government institutions and bodies. The Ukrainian population as a whole, was seen as the final beneficiaries, benefitting from employment and income generation derived from increased MSME competitiveness and business transactions.

26. The project was to collaborate closely with all strategic national and international partners active in the agribusiness sector, including other development agencies and donor organizations, to ensure that synergies were realized, duplications were avoided, and impact was maximized.

- At the national level the project stakeholders were to include:
 - ✓ Ministry of Economic Development, Trade and Agriculture of Ukraine (the Ministry of Agrarian Policy and Food (MAPFU) separated out of it 2020)¹¹;
 - ✓ Ukrainian CCI;
 - ✓ EEPO of Ukraine, a state institution (under the Cabinet of Ministers at the time of writing this report); and
 - ✓ State Service of Ukraine on Food Safety and Consumer Protection (Derzhprodspozhivsluzhba)
- At the regional level the intended key stakeholders initially were:
 - ✓ Local administrations (Dnipropetrovsk, Kherson, Mykolayiv, Odessa, Vinnitsa and Zaporizhzhya), in particular, their agriculture departments;
 - ✓ Kherson: Association “Cluster of Kherson Region Eastern Food Technologies Plus”;
 - ✓ Regional CCIs; and
 - ✓ Sectoral associations: UkrSadProm (Association of Gardeners of Ukraine) UkrSadVinProm (Association of Gardeners, Grape Growers and Winemakers of Ukraine), UkrVinProm (Association of Grape growers and Winemakers of Ukraine), Ukrainian Nuts Association (UNA), Ukrainian Agriculture Export Association (UAEA), etc.

27. The list of the BSOs (mentioned earlier) got both narrowed down as a result of the war and the occupation of parts of Ukraine and expanded, involving more sectoral associations (in vine and wine in particular). In addition to the main partners presented above, the project was to also collaborate closely with other stakeholders, including standards bodies, relevant ministries and district administrations, BSOs, producer cooperatives and clusters (see the discussion under Section 3.3.1 Output 3 and Section 3.4 on Efficiency), signing Memorandums of Understanding (MoUs)/partnership agreements with each partner (see the discussion under Section 3.3.1 Output 3)

¹¹ The Ministry of Agrarian Policy and Food (Міністерство аграрної політики та продовольства: *Ministerstvo ahrarnoyi polityky ta prodovol'stva*) is the central executive authority of Ukraine in charge of country's agro-development. It is one of the oldest government agencies of Ukraine. On 29 August 2019 the ministry's function were taken over by the Ministry of Economic Development, Trade and Agriculture. On 17 December 2020 the ministry was resurrected.

28. At the *enterprise level*, the project was to continue to work with the existing beneficiary MSMEs, which demonstrated positive dynamics, to ensure that they reach the level of confidence necessary to ensure the sustainability of their exports to target markets and generate sufficient income to (re-)invest in production and pay for the services provided by BSOs. The project was to scale up the number of MSME beneficiaries. Newly joined SME beneficiaries were to undergo a complete cycle of development in alignment with Phase I's capacity-building structure. At the *BSO level*, the strategic approach was to continue to be based on consistent capacity building to improve and sustain their operational and managerial capabilities to offer relevant and quality services to MSMEs. Therefore, the capacity-building activities intended for the BSOs, and MSMEs were to be synchronized so that BSOs were well-positioned to meet the demand from MSMEs at the various stages of their internationalization and growth. At the *government level*, the project was to ensure the participation of government representatives in different project activities and knowledge-sharing platforms to foster the private-public sector dialogue, by, *inter alia*, involving them in developing strategies/roadmaps to build their capacities in formulating strategies derived from market perspectives. The project was to also continue to build trust and foster cooperation between different actors in the target sectors.

29. An inclusive approach was to address

- a) *gender issues*, as strengthening export performance in the target sectors was expected to provide benefits for female workers and the project was to build skills among women to enable them to take over more sophisticated functions in enterprises, encouraging them, among others, to fulfil managerial duties;
- b) *pro-poor benefits*, by ensuring that benefits accrue to companies of various sizes, including small ones and do not favor larger and stronger ones only and by social inclusion of marginalized people, as well as increasing their share in the total value of production. It was assessed that as labor-intensive value chains, the selected sectors/product groups provide significant potential for this, serving as drivers of employment, entrepreneurial activity, and income generation, including women and youth who traditionally have relatively fewer earning opportunities.
- c) *Environmental benefits*. The project was to ensure the dissemination of environmentally friendly production methods amongst both enterprises and BSOs, promoting environmental sustainability: given (a) that long-term survival of the target sectors will require environmentally friendly and marketable production; and (b) the growing demand of consumers, particularly in the EU, for products of higher quality and sustainability. It was expected that the project will include awareness-raising workshops dedicated to environmental issues and organic agriculture and that producers would be linked to relevant projects/expertise assisting them in meeting environmental standards.

30. Phase II was designed with 4 Outputs, see [Table 3 3](#) for the expectations for each output and the planned Activities. In terms of the impact sought, Phase II was to contribute not only to growth of export and sustainable economic growth in the country, but also to job creation, economic empowerment of women; and minimization of the environmental footprint by introducing principles of sustainable production practices and standards.

Table 3: Planned Outputs and Activities and expectations

Outputs	Expectations for the Outputs	Activities
Output 1: Roadmap updated and/or developed for selected value chains.	<ul style="list-style-type: none"> It was planned to update roadmaps for fruits and vegetables. The roadmap for nuts was being developed by the project at the end of Phase 1. The roadmap for the wine sector was to be designed using the value chain approach and priorities set in cooperation with relevant stakeholders and producers. It will allow to identify trade-related constraints faced by SMEs, gaps in BSO services, and to develop measures to boost the competitiveness of the sector. It was planned that the project will closely engage the stakeholders and local authorities in the strategy formulation process to develop local capacities to formulate sound strategies and policies derived from market perspectives. The close interaction with the private sector representatives and relevant expertise was expected to contribute to a better understanding of the private sector's needs and create an environment that allows challenges to be discussed openly and priorities set in a consultative manner. The expected results of Output 1: the number roadmaps/strategies developed/updated and endorsed by stakeholders, as well as the increased capacity of relevant stakeholders and local authorities to understand and set strategic priorities for the development of the sectors concerned. 	
Output 2: Capacities of SMEs strengthened to improve their international competitiveness	<ul style="list-style-type: none"> The project was to assist selected MSMEs from the selected sectors to reinforce and enlarge their presence in the market and increase exports. For all product groups, including wine, the focus was to be on improving the capacity of MSMEs to meet EU market requirements (mandatory and voluntary) including food safety, environmental management, and sustainability standards; The project was to enhance SME capacities through awareness building, training, advisory services, and study tours. The scope was to include building competencies in growing, harvesting, post-harvesting, packaging, logistics, marketing and sales, branding, Corporate Social Responsibility (CSR), as well as in business planning and management. It was expected that as a result of the assistance delivered through training and advisory services beneficiary enterprises/producers will get a better understanding of the market requirements, implement changes to improve their international competitiveness, introduce quality standards as well as adjust products to the needs of the target markets. 	<p>Activity 2.1: Conduct training and awareness building workshops for SMEs in selected areas based on the roadmap</p> <p>Activity 2.2: Provide direct assistance to pilot SMEs and producers through advisory services in selected areas based on the roadmap</p>
Output 3: Capacities of BSOs strengthened to provide SMEs with relevant business support services	<ul style="list-style-type: none"> The project planned to continue to enhance BSOs capacities, enlarge their service offerings to MSMEs and develop operational and managerial performance. The scope of BSOs capacity building was to cover supply chain management, quality assurance and certification, trade intelligence, market analysis, and research, sales, export strategy. To ensure sustainability, the project was to anchor knowledge sharing platforms within partner BSOs, help them to integrate into international networks, and establish mechanisms for cooperation. BSOs were to be assisted in collecting and using the knowledge gained from project seminars and trainings in order to anchor this knowledge at the national level and ensure general dissemination within the country. BSOs were to be entrusted with leadership of event organisation such as trade fair participation and matchmaking events. After successful joint organisation of first events, the projects will take a step back and will act in the background supporting the BSOs in case assistance is required. Thus, BSOs will learn by doing while receiving full visibility of the action. BSOs were to be also backstopped in their fund-raising efforts throughout the project's lifecycle, in particular by training and helping them to develop fund-raising strategies. It is expected that at the end of the project at least six partner BSOs will improve/develop new service portfolio and develop operational capacities; sectoral SMEs will appreciate and value the services and will be willing to pay for them; knowledge-sharing platforms will be established and better coordination among BSOs will be ensured. 	<p>Activity 3.1: Conduct trainings including on-the-job trainings for selected BSOs on key areas for improvement</p> <p>Activity 3.2: Create mechanisms for cooperation and information-sharing between Ukrainian BSOs and their foreign counterparts</p> <p>Activity 3.3: Help selected national BSOs to become resource centres to collect, archive and share knowledge from seminars and trainings conducted under the project</p>
Output 4: Business linkages created for SMEs to expand sales in both domestic and international markets, in particular in EU	<ul style="list-style-type: none"> The major focus of the project was to be placed on assisting companies to establish market linkages leading to tangible results. Beneficiary SMEs from the F&V sector were to be continued to be connected to target export markets and linked with buyers, thus ensuring their solid presence in the foreign markets, internationalization, and sustainable business generation. For the new product group- nuts the project was to initially focus on identifying target markets and preparing beneficiary SMEs for the interaction with buyers and for participation in matching activities, i.e., trade fairs, meetings with buyers, etc. As a result, it was expected that SMEs will be ready for matching events and for successful participation in trade fairs; and will establish new contacts with potential for business transactions. 	<p>Activity 4.1: Identify potential markets and new buyers for the target product groups Identify potential markets and new buyers for the for nuts sector</p> <p>Activity 4.2: Assist pilot SMEs in preparation for trade fairs, buyer/seller events and study tours, including developing practical guides on export procedures and requirements for selected priority markets</p> <p>Activity 4.3: Organize participation of pilot SMEs in trade fairs, buyer/seller events, and study tours</p>

31. Particular attention was to be paid to the achievement of sustainable results through the following (exit strategy) so that both enterprises and institutions were enabled to continue progress once ITC assistance is withdrawn:

- *Successive phasing of local partners:* direct interaction between the project and enterprises was to be gradually reduced and substituted by local service providers, coached by the ITC. The responsibility for organising capacity building events, study tours, trade fair participation and other activities for businesses was to be increasingly shifted to the local service providers and industry groups;
- *Two-track capacity building for the service providers:* a combination of academic training with on-the-job training, to multiply the delivery of quality service relevant to enterprises in the sector on an increasingly commercial basis;
- *Participating enterprises with better understanding of their needs for advisory services and appreciating their importance and advantage, and therefore beginning buying services from local service providers.* The responsibility of local enterprises was expected to gradually increase for selecting and paying service providers for advice and training, market analyses and participation in trade fairs and missions.
- *Collective approach and showcases enhanced through systematic dissemination of best practices, enterprises and service providers* – to serve as showcases for others, based on an assumption that (a) innovative business practices are copied by competitors, including the use of consulting services; and (b) these multiplier and replication effects lower intervention costs, compared with individual assistance to enterprises, and enhance the exchange of information and experiences, ultimately becoming self-replicating processes; and
- *local service providers/ national consultants used to perform the majority of training and advisory services to enterprises,* to independently deliver high quality assistance in the selected areas at the project’s close. This localized knowledge and practical experience were expected to be used in providing continuous backstopping and coaching to MSMEs.

2.2. MAJOR CHANGES IN DESIGN

32. Overall, Phase II implementation activities have been negatively affected by two main external factors:

- a. COVID-19 pandemic, which negatively affected trade, growth, global value chains and employment led to a shift to online format of training;
- b. Russia’s war on Ukraine and its occupation that have caused the most severe impact and created further risks and challenges for Phase II (see the [Section 3.1 on Relevance](#)) promoted the opening up the project’s geography for the whole country; and

- c. The ProDoc mentions market linkages created for SMEs from F&V and nuts sectors to expand their sales domestically and internationally in particular, with a focus on the EU market. Thus, it does not phrase as exclusively the EU market. The project targeted also Gulf countries, by participating in Gulfood (and thus reaching out also to North Africa and Asia market representatives). This was based on the report “International Market Opportunity Study for Ukrainian Fresh and Processed Fruits & Vegetables” (2016)¹².

2.3. THEORY OF CHANGE

33. The ProDoc contained a descriptive Results Chain, but not formulated as a Theory of Change (ToC). Box 1 and Figure 3, reconstruct those.

Box 1: Reconstructed TOC

Project Rationale and Objective: contribute to enhanced competitiveness and sustained export growth of Ukrainian SMEs in the fruits, vegetables, nuts and wine sectors

The project's **Inputs** were: Assistance to the MSMEs in fruits, vegetables, nuts and wine sectors and strengthening the capacities of the business support organizations as suppliers for such assistance

Outputs: (a) Roadmap updated and/or developed for selected value chains.; (b) capacities of MSMEs strengthened to improve international competitiveness through (i) assisting MSMEs from the F&V sector (including nuts) to produce goods as per market requirements, linking pilot MSMEs to target markets, particularly within the EU, improve business operations leading to their increased international competitiveness; and (ii) support to the vine and wine sector with a main focus on quality and production, helping sector representative to take a strategic approach toward sector's development; and (c) The capacities of BSOs to provide quality services to MSMEs with relevant business support services are enhanced; they are better integrated in knowledge-sharing platforms and better coordinate their activities.

Leading to Outcomes as (a) Improvement of MSME international competitiveness, Improved market access, Increased sales and sustained export growth; (b) wider adoption of environmental principles in production leading to better value chains; (c) women's empowerment; (d) pro-poor impact; (e) BSOs strengthened to gradually take over providing similar services as the project to the enterprises: training, analytical services, support in organizing study tours and participation in trade fairs

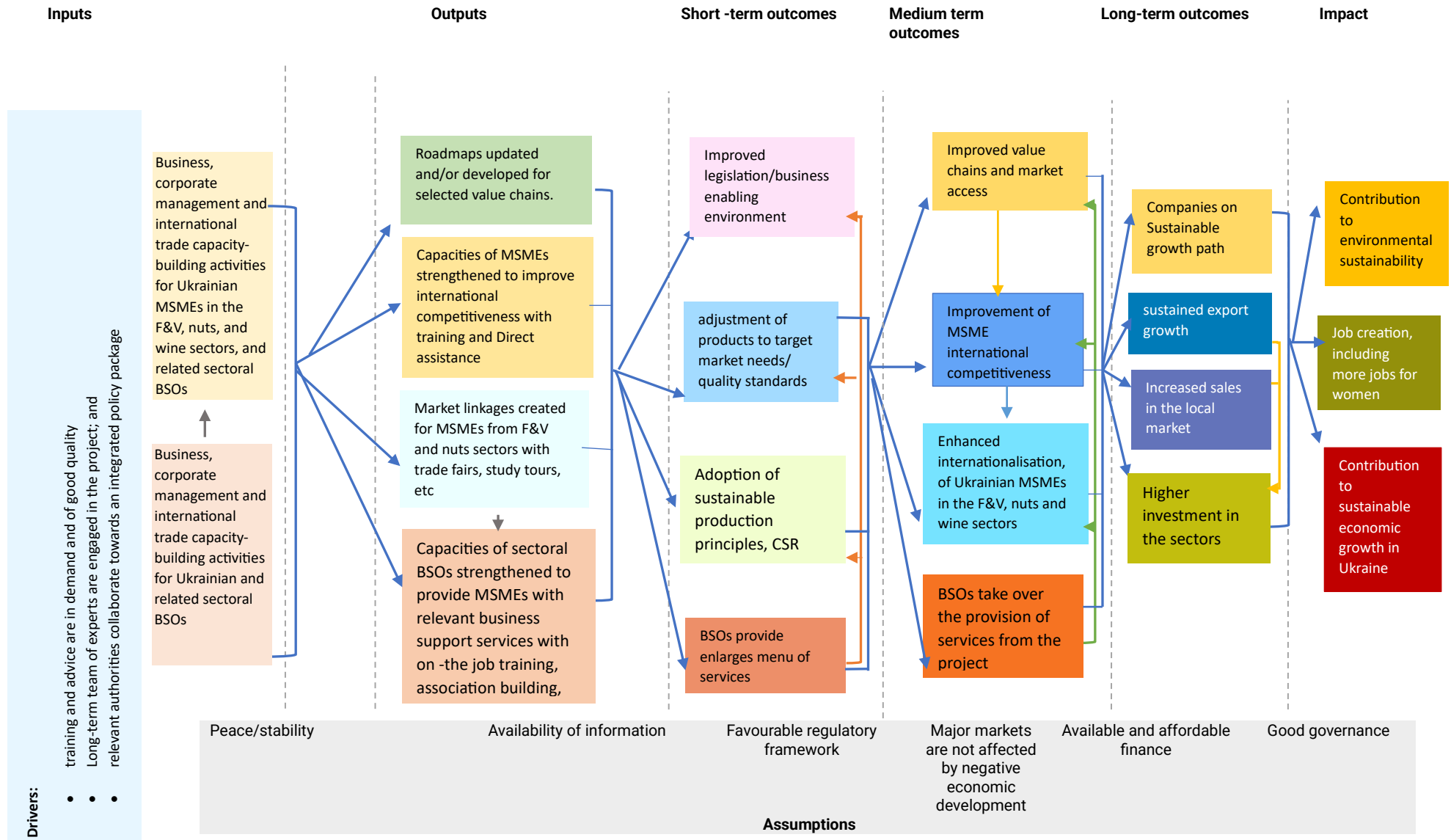
Leading to impact as growth of export and sustainable economic growth in the country, but also to job creation,

These pathways would work provided that the following **Assumptions** hold: (a) stability (possibility to operate in the environment of ongoing war); (b) information is available regarding the potential partners/part of the value chains/buyers; (c) regulatory framework is favorable for the businesses enabling them to take action to grow and engage with new partners; (d) major markets are not affected by negative economic; (e) finance is available and affordable; and (f) there is a climate of good governance, not marred with high levels of corruption

The following factors considered to be within the influence of the project, were to enable/support the implementation (Drivers): (a) tools and methodologies are considered useful and applicable by authorities; (b) Long-term team of experts are engaged in the project; and (c) relevant authorities collaborate towards an integrated policy package

¹² [Documents | International Trade Centre \(tradeproject.com.ua\)](https://www.tradeproject.com.ua)

Figure 3 Reconstructed results chain



2.4. MANAGEMENT ARRANGEMENTS

34. The project is being implemented by ITC in close cooperation with the government and regional BSOs, such as chambers of commerce and industry (CCI), business clusters, and sector associations. As a result of the project activities, it was expected that new regional BSOs will be strengthened and enabled to become project partners.

35. At the country level:

- The country-level management of the project was entrusted to a NPM responsible for administering the project activities in the field, and, under ITC's supervision, for the recruitment and monitoring of national consultants and local service providers, for the provision of substantial inputs to different project components, liaison with the public and private sector BSOs and business community, and cooperation locally with other donor projects; and
- The project partner institutions were to- to the extent possible (subject to their limited resources) - provide in-kind contributions, such as staff time, office facilities, and dissemination of reports to concerned entities.

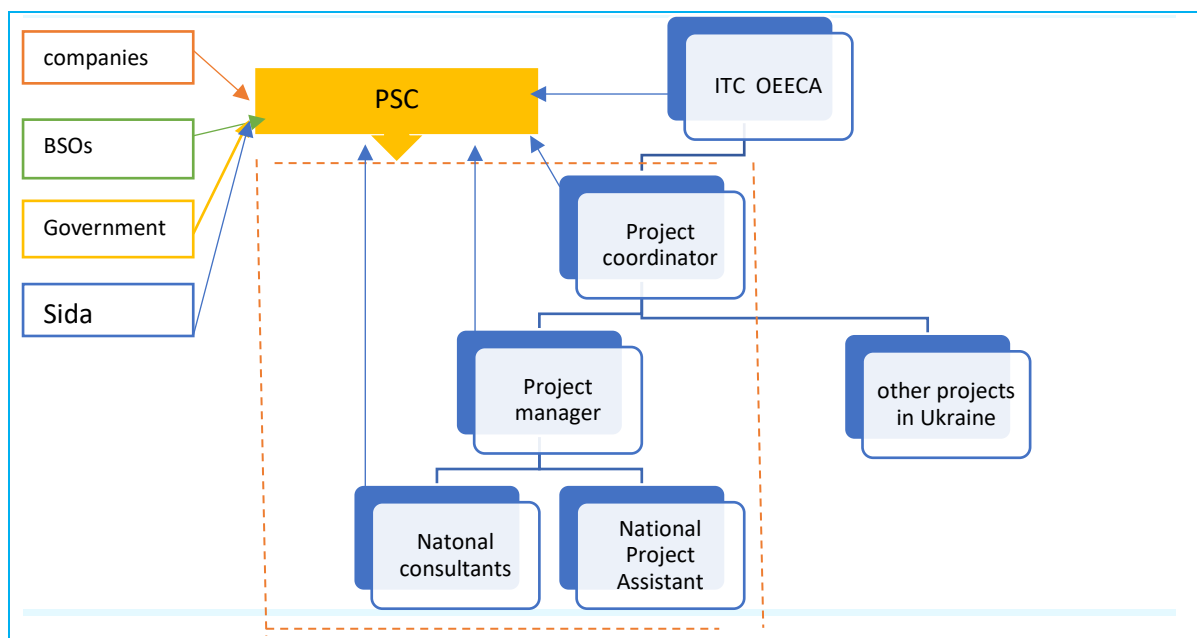
36. At ITC HQ:

- the project HQ-based Project Manager managed the project on a part-time basis, responsible for the overall management, monitoring and implementation of project activities at the field level, and supervision of the project office in Ukraine, working under the direct supervision of ITC's responsible Country Officer and the leadership of the Chief, Office for Eastern Europe and Central Asia (OEECA).
- Overall, the HQ team was responsible for financial monitoring and regular budget revisions, as well as ensuring effective project reporting to the donor. All studies, roadmaps, direct assistance, on-the-job-training, and participation in market linkage events were to be implemented by ITC technical advisors and/or ITC international consultants supervised by ITC experts.
- Furthermore, the HQ team was to provide advice and support to all national stakeholders on various issues related to the project and ensure that the changing needs of beneficiaries are addressed.

37. A PSC was to be established, comprised of the donor representative, ITC, and representatives from the responsible ministry, CCIs, and other key partners and stakeholders. Representatives from other line ministries and partner organizations were to be invited to participate in the meetings when appropriate. The PSC was to serve as a board for the resolution of strategic questions and ensure transparency in the planning and implementation of project activities, and also facilitate contacts with governmental bodies and donor organizations and ensure that the project's outputs respond to the country's priorities throughout the entire project lifetime. The NPM was to prepare and submit to the PSC review

meetings “Project Progress Reports” that include project monitoring information. The PSC was to meet at least once a year.

Figure 4: Project Organigram



2.5. M&E SYSTEMS

38. The indicators and targets, means of verification are presented in the Logical Framework (see [Annex 2: TOR](#)).

39. Baseline data for impact assessment was collected during Q1-2021, as planned (on the number of people employed and salaries) to compare with the endline assessment at the project close (which is planned to be conducted). As for the exports – these are captured as part of the baseline assessment, and - at the end of project- only the information from the State Statistics Service of Ukraine was to be used.

40. Project monitoring was carried out by means of supervision from ITC (HQ and project office) and through the PSC as well as yearly progress reports, which were to cover the status and accomplishments of the project activities and outputs.

41. ITC was to undertake monitoring and supervision missions to Ukraine at least once a year, with subject specialists, but this was not possible after the eruption of the war.

3. ANALYSIS AND FINDINGS

3.1. RELEVANCE

42. *At the start of the Phase II, as in Phase I, the project responded to the correctly identified business environment constraints, in line with its ability, being informed by the analyses and ongoing monitoring.* The implementation of the bilateral EU-Ukraine Association Agreement (AA), including the Deep and Comprehensive Free Trade Agreement (DCFTA), which was signed in 2014 and came into force in 2017, offered Ukraine an opportunity to modernize its economy by stimulating improvements in the business environment, by facilitating improved access to the European market, and by providing additional motivation for investment in the sector. The studies and experience pointed to significant potential for offering several competitive and unique products, such as local specialties, vegetables of a specific taste, etc., as well as for added value, at least for primary processing.

43. *The new market opportunities offered by the DCFTA have incentivized the sector to improve the quality and competitiveness of its products, but as it stood then, many of the agricultural sector's MSMEs lacked the appropriate skills and capacities needed to export to the EU.* They needed, in particular, knowledge and more effort towards meeting new and more demanding market requirements, quality standards, obtaining necessary certifications and investing in technology and production facilities. In addition to the mentioned challenges, participation in trade-fairs was difficult on their own for the companies due to lack of experience, and lack of financial capacities. Plus, trade financing as a financial instrument was not well developed in the country, and the local consulting markets as well as the services by the BSOs were limited.

44. *Phase II was relevant also due to the need to deepen the efforts at building sustainability potential of the results achieved under Phase I.* There were still issues with mistrust between public and private players and the sectors suffered from the institutional underdevelopment. The April 2018 Mid-Term Self-Evaluation Report (MTR hereafter), assessed Phase I as relevant and aligned with country priorities, but highlighted that "the underdeveloped institutional framework, seasonality of the fruit and vegetables business, overall absorption capacity and overall mistrust among stakeholders, requires more time and efforts to gain the scale and intensity initially envisaged" (p. 5).

45. *Phase II design took into account lessons learned from a similar earlier project focusing on berries and textile sectors.* The project "Eastern Partnership: Ready to Trade - an EU4Business initiative 2017-2021" aimed to help SMEs from Eastern Partnership (EaP) countries integrate into global value chains and access new markets with a focus on the EU. The intervention assisted SMEs in producing value-added goods in accordance with international and EU market requirements, while linking them with buyers from global value chains and markets, in particular within the EU. As part of this process, the assistance improved sector specific services to SMEs by strengthening the capacity of local BSOs in agro-processing

(berries), and textile and clothing. This project had a very similar design. There were joint activities with the Phase I and the beginning of Phase II of the project under the evaluation.

46. *The programming of the new Phase II was carried out, taking into consideration the experience gained from Phase I overall and more specifically given the recommendations of Phase I's MTR conducted in March-April 2018.* This is described in **Table 4**.

Table 4: Actions taken in the design of Phase II in the light of the Recommendations from the MTR of Phase I

Recommendations from the MTR of Phase I	Actions taken in the design of Phase II
Revision of the BSO intervention approach of the project to develop a higher value business enabling environment within the regions or on national level. Longer-term and consistent actions are required to strengthen BSOs, increase their role and ensure appreciation of their services by SMEs.	This was planned, but was affected by war (see Section 3.3.1 Output 3)
Involving an ITC business enabling environment expert to leverage international (ITC) expertise on BSO development within the project	This was acted upon (an international consultant was engaged after the MTR Phase I) but was affected by war (see Section 3.3.1 Output 3)
Aiming at attracting more SMEs to be connected and actively participating in the project	The project management puts efforts to engage new companies
Improving communication on best practices to mobilize other SMEs in the three regions	The project created "success stories" page on their website (but see Section 3.4 on Efficiency)
Enhancing SME coaching further towards specific SME needs	There are direct assistance/coaching measures provided bases on company requests.
Continuing and further intensifying the presence during trade fairs and organizing continuous buyer-seller meeting.	This received continued focus, especially in relation to participation in trade -fairs.
Better structured communication with participating and interested SMEs, both in terms of longer-term overview of events as well as short term notifications	The project opened the FB and telegram pages (the latter was discontinued by the time of writing this report) (but see discussion in Section 3.4 on Efficiency)
Intensified connections with national institutions and government	Representatives from the Government participated in project supported study tours
Special emphasis on women as the share of women-owned and women-controlled companies and of those having a majority of female employees remains limited in the target sectors; and	There was a training with Rural Business Women Network

47. *The project followed a demand-driven approach.* Phase II design was based on a survey which assessed the results of Phase 1 and the needs for Phase II in 2020¹³. In particular, this study of produce-growing and -processing companies in Ukraine in December 2020 was designed to (a) collect information on the F&V sectors in the project's target regions; (b) to assess the state of Ukrainian enterprises and the progress against the project action plan aimed at increasing SME competitiveness by integrating them into domestic and global value chains and linking them to new markets, (c) to update the Project Team's knowledge about produce-growing and -processing companies, their capacity, and challenges; and (d) identify further

¹³ Report on Study of Produce Growing and processing Companies, ITC, 2020. In early 2016 when the project started, a similar survey was conducted to assess the F&V sectors in Ukraine's southern regions and to identify areas where project beneficiaries needed support.

areas, where SMEs needed support. The results of the study were used for preparing Phase II activities.¹⁴ The survey's results, *inter alia*, indicated the need in the continuation of the project in the F&V sector (see **Box 2**).

Box 2: Summary of baseline of Phase II

The *Study of Produce Growing and processing Companies (ITC, 2020)* conducted on the territory of Kherson, Mykolayiv, Odesa, Dnipropetrovsk, Vinnitsa and Zaporizhzhya surveyed 176 F&V producers and 47 processors of these products.

According to the study,

- the average age of business owners was 47-49 years. Almost 98% of owners of both production and processing companies were male.
- Chief executives noted employee turnover making it necessary to constantly train personnel. 90% respondents among processors and 77 percent – among producers focused on production training. Chief executives prioritized technical experts and lacked understanding, of how important a quality marketing department was. Only 11 percent of employees underwent management training, possibly due to a low number of middle managers.
- 74 percent of enterprises were focused on the domestic market - many of them concentrated on sporadic sales 'from the field'. They did not need qualified personnel with sales and long-term relationship building skills. Since producers were not export- oriented, a number of companies with international standard compliance certificates was rather small. At the same time, 62 percent of surveyed processors were export-oriented, and 90 percent of them already had certificates or were undergoing certification (possibly due to the passage of the Law of Ukraine 'On the Food Safety and Quality Basic Principles and Requirements').
- Processors did not use 100 percent of their facility capacity. One of the problems was the poor level of cooperation with commodity producers and suppliers. Contract farming was not developed well enough.

The EU countries (Germany, Poland) had become main export destinations over the previous years, but at the same time only 43 percent of respondents were aware of export-related requirements of the EU market. Most fixated on the domestic market, but considered dissatisfying due to low prices.

Producers and processors pointed to the following challenges: failure to meet contract requirements, low commodity quality, unpredictable commodity prices. Processors were interested in developing a network of F&V suppliers, which would guarantee quality and stable supplies. Access to funds, expensive loans and inability to upgrade equipment had a direct impact on the sector. Lack of working capital (buyers predominately ask for deferred payments), shortage of means for proper pesticide treatment of crops and lack of sufficient storage facilities (controlled atmosphere storage rooms) also affected export. Crop yields were hard to predict due to climate changes. The lack of working capital and long-term investments restrained export and international trade development.

The survey identified the following respondents' needs:

- (a) trainings in cultivation practices;
- (b) introduction of new technologies and equipment in order to intensify and mechanize production and reduce production costs;
- (c) Participation in international trade fairs and business missions abroad;
- (d) Attraction of new clients; and
- (e) Research of markets and optimization of business processes in order to reduce costs.

The summary of producers' TOP-5 requests showed that they were mostly interested in: international cooperation issues, new customers, market research and organization of events to meet potential clients, partners or investors. Due to the state not having any such plan to support agricultural producers, international projects and consultants with experience in successful cooperation with producers that could offer high level expertise in the sector, were perceived as playing key role in responding to the above-mentioned needs. Processing companies sought support mainly to sell their products and to get access to international markets. While the companies' readiness to this step, availability of product and production certification and other important aspects of preparing to international trade was understood to be important, a large share of companies (85 percent) was ready to work and cooperate in this area: many of them wanted to learn about ITC market analysis tools (66 percent) and to prepare offers to international partners.

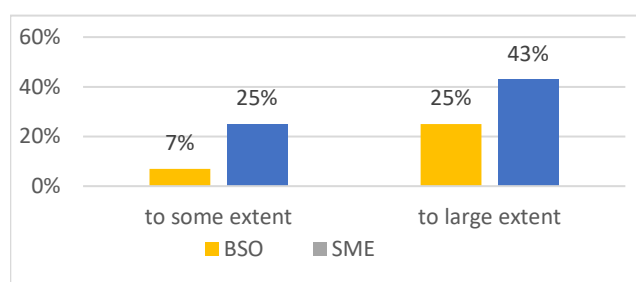
Source: Report on Study of Produce Growing and processing Companies, ITC, 2020

48. The companies and institutions surveyed for this MTE in their vast majority stated that the project responded to their needs (see **Figure 5**)

¹⁴ As agreed with the donor, as a result of the COVID-19 pandemic, no final assessment of Phase I (2016-2021) was carried out

49. *Phase II was developed as a result of a direct request from beneficiaries as well as local stakeholders including regional governments and relevant sector associations.* All proposed interventions were discussed and agreed upon with the SMEs, BSOs, and public sector stakeholders and adjusted to their evolving needs.

Figure 5 Extent of alignment of ITC support with the needs



Source: Online survey

50. *While in the nuts sector, the work started from 2019, with the Roadmap and initial steps, the intensive engagement followed in Phase II: the timing was highly relevant as the industry transformed from household orchards to commercial orchards.* Therefore, it was considered essential to support commercial producers with establishing market linkages.

51. *Inclusion of the vine and wine sector was timely.* Reforms in the vine and wine sector started when in March 2018, the Parliament (Verhovna Rada) passed a bill aimed to simplify the procedure for registering a small or medium-sized wineries (this happened in the face of the decline of the sector after the boom in 2010s, due to, *inter alia*, trade restrictions imposed by Russia). Bureaucracy in licensing was eased, with lesser number of documents required (reduced from 150 to 2). So, towards the end of Phase I the vine and wine sector development in Ukraine was gaining momentum and needed a structural approach to sectoral development to contribute to the benefit of its players, in particular growers, as well as to address quality aspects respecting fair trade principles.

52. *The project benefitted from an earlier ITC project on National Export Strategy 2018-2019* Through the development of 5 sector strategies and 4 cross-sector strategies to complement the STDR, this initiative sought brought about a concerted national vision on how to enhance Ukraine's trade competitiveness, particularly for SMEs and a coherent strategic framework for trade.

53. *The project is in line with the Government's strategies.* The key documents that determine the programme principles of agricultural policy in Ukraine, and with which the project is in line with, include:

- a) the "National Economic Strategy until 2030";
- b) the "Concept of the State Target Programme for the Development of the Agricultural Sector for the Period until 2022";
- c) the Ordinance of the Cabinet of Ministers of Ukraine No. 688-p of 14 August 2019 "On approval of the Irrigation and Drainage Strategy in Ukraine until 2030";
- d) the Ordinance of the Cabinet of Ministers of Ukraine No. 995-p of 23 September 2015 "On approval of the Concept of Rural Development";
- e) the Ordinance of the Cabinet of Ministers of Ukraine No. 489-p of 19 July 2017 "On approval of the Action Plan for the Implementation of the Concept of Rural Development";
- f) the legislation on land reform and on cooperatives;

- g) the (draft) Recovery plan of the National Council for the Recovery of Ukraine from the Consequences of the War on "New agrarian policy" working group stated that it was necessary to provide raw materials for the processing sector; restore/ set out new berry fields on the area of 49.8 thousand hectares, new orchards on the area of 230.7 thousand hectares and nuts on the area of 8.4 thousand hectares; etc.; and
- h) the AA with the EU as the central driving forces in a broader reform agenda.

54. *The project is aligned well with the Strategy for Sweden's reform cooperation with Eastern Europe for 2021-2027, in particular with its elements related to inclusive economic development.* Sweden's lasting support to the region and long-term perspective based on a seven-year strategy is based on the goal to provide clear added value. Activities in the area of inclusive economic development include:

- To contribute to the implementation of the AA and to developing opportunities for productive employment with decent working conditions and improved livelihood opportunities, with the priority given to marginalized groups;
- To promote better conditions for free, fair, sustainable and inclusive trade and for integrating the partner countries' economies in regional and international value chains and markets, including the EU's; and
- To harness the potential in increased intra-regional economic cooperation¹⁵.

55. *The more competitive enterprises in these sectors contribute to achieving targets linked to the 2030 UN Agenda for Sustainable Development*, more particularly Sustainable Development Goal (SDG) 8 "Promoting sustained, inclusive and sustainable economic growth, full and productive employment"; SDG 12 "Responsible consumption and production"; SDG 9 "Industry, innovation and infrastructure", and SDG 5 "Gender equality".

56. *The project remained relevant in the face of the war; it could be claimed that its relevance became even more pronounced (see Quote 1).* Many of Ukraine's value chains¹⁶ have been disrupted, its business environment has declined, and economic actors have lost access to their traditional trading partners throughout the Commonwealth of Independent States (CIS), more particularly the Russian Federation. FAO (2023)¹⁷ study showed that the majority (87 percent) of the enterprises that ceased production were in the front-line oblasts and they did so due to farms being

Photo 1: Wineries under shelling



Heorhiy Molchanov stands by part of a bomb that juts from the earth at his Slivino Village winery near Mykolayiv, Ukraine.

<https://www.rferl.org/a/ukraine-war-wine-industry-struggles-successes/32725692.html>

¹⁵ Strategy for Sweden's reform cooperation with Eastern Europe for 2021–2027

<https://www.kmu.gov.ua/storage/app/sites/1/recoveryrada/eng/new-agrarian-policy-eng.pdf>

¹⁶ "Value Chain" must be construed as the description of the full range of activities that are required to bring a product or service from conception through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers, and final disposal after use.

¹⁷ FAO (2023): UKRAINE -Impact of the war on agricultural enterprises Findings of a nationwide survey of agricultural enterprises with land up to 250 hectares, January–February 2023

temporarily closed, losing control of the farmland as a result of the war, engagement of the owners in the war, death of the owners as a result of the war, and the sale of the land after the start of the war. Changes in the cropping patterns were also evident along with the overall decrease in the number of producers (almost 6 percent decrease between 2021 and 2022). [The increase

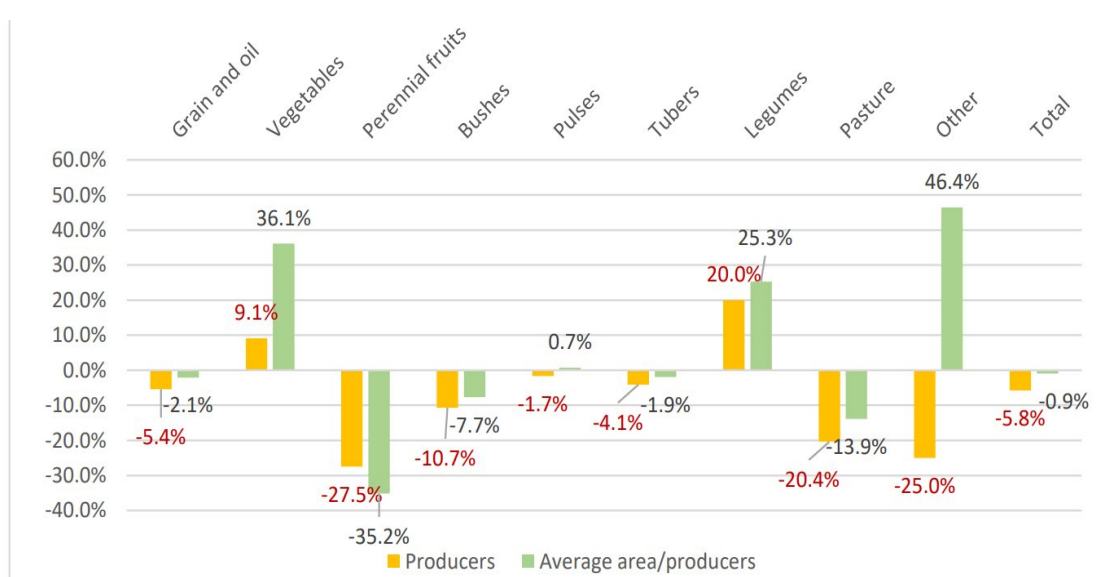
Quote 1: Relevance

"In the context of the war, the project is very important for the export-oriented SMEs..." ...
An SME,

Source: KII

in the number of enterprises planting vegetables and legumes can be understood as an effort to diversify production, a coping mechanism due to export and income limitations]. The changes in the production of perennial crops were due to the significant shortages in labour availability and consequent abandonment of production. (see **Figure 6**).

Figure 6: Change in average area and entities per crop (%) after the start of the war



Source: UKRAINE -Impact of the war on agricultural enterprises Findings of a nationwide survey of agricultural enterprises with land up to 250 hectares, January–February 2023, FAO 2023

57. The agricultural lands of Ukraine were severely damaged as a result of the explosion of the Kakhovka HPP. Based on high-definition remote sensing images, NASA Harvest¹⁸ estimated that, as of 7 June 2023, the total flooded area was around 410–420 square kilometers (41 000–42 000 hectares), including about 3.5–5 km² (or 350–500 hectares) of croplands. The damage to the irrigation system made vegetable cultivation in Southern Ukraine almost impossible. Restoring irrigation would require significant investments and a lengthy period. Floods, in addition to washing away fertile upper soils, moved sediments from the reservoir and other water bodies, altering soil composition, and increased the risk of contamination¹⁹

¹⁸ NASA HARVEST. 2023. Navigating The Kakhovka Dam Collapse: NASA Harvest Consortium Assesses Agriculture Impacts with Satellite Imagery. Mary Mitkish, Inbal Becker-Reshef. NASA Harvest, coordinated by the University of Maryland Center for Global Agricultural Monitoring Research. 12 June 2023. <https://reliefweb.int/report/sudan/sudan-2023-humanitarian-response-plan-december-2023-enar>.

¹⁹ <https://www.fao.org/3/cc7109en/cc7109en.pdf>

58. As a result of the war, Ukrainian farmers also lost the cheapest way to export their products to the foreign market - by sea. Land and river transport became an alternative, but such transport is more expensive. Low prices for agricultural products and the increase in the cost of transportation services led to the fact that farmers lost most of the profit from the sale of products. As a result, many farmers refused to harvest.²⁰

59. According to the State Statistics Service the collection of vegetables fell by 25 percent in 2022 and fruits by 10 percent. The occupation of the region affected the volume of tomato production (it was halved). 25 percent of berry fields and 20 percent of orchards were lost due to the war. Apples were the most affected, their harvest fell by 12 percent. In 2022, 13 percent less of strawberries was harvested.²¹

60. *It is crucial for Ukraine to bring its economy back on track, and the sectors and the farming community showed incredible resilience.* The farmers of Odesa Oblast were able to compensate for the loss of Kherson Oblast (by 15% more), because Odesa Oblast has irrigation systems and Cherkasy Oblast (+5%) - the region has access to the Dnieper. There was no significant shortage of vegetables in Ukraine, because many farmers reoriented part of their agricultural land to vegetable growing. Many enterprises also relocated from the affected regions. Fruit growing also migrated from traditional Ukrainian regions. In 2022, more fruits began to be grown in Cherkasy region (+30%), Kirovohrad region (+26%) and Lviv region (+9%). The Mykolaiv region harvested twice as many grapes as 2021, the Cherkasy region entered the top 10 regions for cherry cultivation²². Supporting these resilient companies was even more relevant in the war context. However, it would take several years to fully compensate for the loss of volumes, because in addition to growing vegetables, it is necessary to build infrastructure for storage and sorting.

61. *Export sales is foreseen to be the only driver of internal production.* That is why a growing number of growers and producers sought to export and to find new international markets²³. The results of the European Bank for Reconstruction and Development (EBRD) survey revealed a high demand among SMEs for assistance in export activities and market expansion. Most of the needs identified aligned with ITC project's objectives and activities.²⁴ The role of exports was prominent also because of additional factors. For example, while Ukraine's craft winemakers were hit hard by the war (see **Photo 1**), the growing international interest in Ukrainian wine, was partly prompted by the Russian invasion, and laid fertile ground for the domestic wine industry to start expanding -- and Ukrainian politicians starting to take note of the window of opportunity.²⁵

62. *Meanwhile the war brought additional barriers for the exporters,* including: restrictions related to foreign exchange transactions, restriction to the movement for men; high risks associated with lending/borrowing; brain-drain and the associated even further lack of local experts, etc. Some potential markets with high level of import of fruits and other products like

²⁰ <https://visitukraine.today/blog/2169/the-impact-of-the-war-on-the-agricultural-sector-of-ukraine-analysis-of-the-latest-data-from-the-state-statistics-service>

²¹ ibid

²² ibid

²³ ibid

²⁴ [Challenges-and-Needs-of-SMEs-in-War-Time-en.pdf \(merezha.ua\)](#)

²⁵ <https://www.rferl.org/a/ukraine-war-wine-industry-struggles-successes/32725692.html>

Egypt, India, Indonesia have import restrictions and trade barriers; Ukraine cannot sell most of F&V products to these markets. The services by the CCIs and sectoral associations got hampered by the ongoing crisis, weakening them even further, for example due to declined ability by the companies to pay membership fees. There is a lack of jobs in rural areas, leading to migration.

63. *The decision to continue the project and expand the geographical coverage, despite the war was taken in a consultative manner and was demand driven, due to the reasons described above.* The PSC of 5 July 2022 agreed that project activities would be extended to all regions of Ukraine (as most of target regions were either occupied or in direct conflict area (Kherson, Zaporizhzhya, Mykolaiv, Dnipro, more or less far Odessa and Vinnitsa). During the same PSC meeting a significant number of beneficiaries expressed their commitment to ongoing project activities²⁶.

64. In May 2022 the project conducted a small internal survey of 26 companies (see **Figure 7** and **Figure 8**). Only 38 percent of the companies that took part in the survey had maintained their pre-war activity. Over 40 percent were forced to close, reduce or completely stop their activities. About 20 percent of the respondents were trying to adapt to new conditions and keep their businesses afloat. Over 58 percent of the MSMEs were affected, but were ready to restore their full performance. 54 percent of companies were ready to continue exporting, subject to the resumption of the logistics infrastructure. Their partners in the Western countries were ready to purchase their products. A few companies (4 percent) were even receiving positive signals for an increase in export volumes. One third of the respondents were still ready to take part in trade fairs as exhibitors either in-person or online. Simultaneously, the share of managers who could not make forecasts was significant (35 percent). Access to affordable finance and tax holidays were identified as the most urgent needs, followed by the need in promotional support and help with retaining the staff.

Figure 7: Status of the SMEs (at the start of the war)

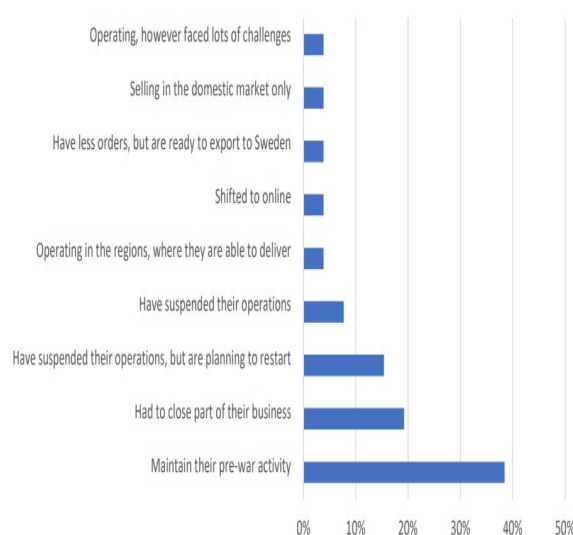
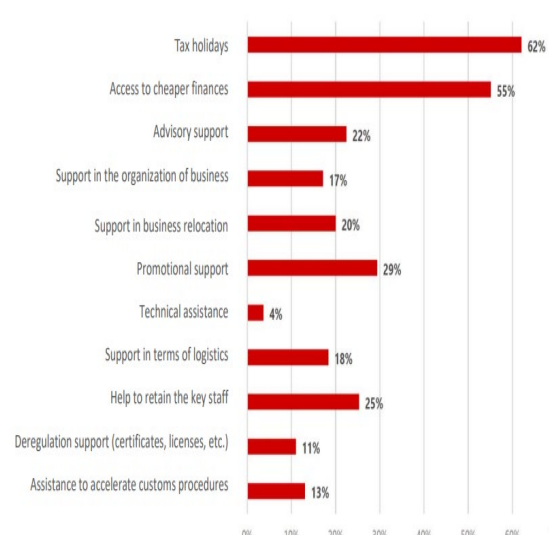


Figure 8 Needs of SMEs (at the start of the war)



Source: ITC (2022): Analytical Report on Survey to Assess the current Situation of Ukrainian SMEs in the Fruits, Vegetables, and edible nuts and Wine Sectors Operating under the war conditions

²⁶ Minutes of PSC 2022 _meeting-05.07.2022

65. *The project continued to support the berry companies in market linkages through trade fair participation after the ITC project funded by EU that supported exports in berries sector in 2017-2021, closed soon after Phase II started, and this was very relevant after the war*²⁷.

66. *The strengths of the project design, include flexibility, sectoral approach. aiming at trust-building, supporting sustainable resilience building with consistent support, and having an exit strategy:*

- Flexibility (same as in Phase I) was crucial to be able to adjust to the changing environment and address the emerging needs of the target sectors, thus maintaining its relevance and ensuring its efficiency;
- The sectoral approach has proven to be an effective way of removing trade obstacles that affect a whole group of beneficiary enterprises and related institutions to achieve timely and targeted results with the given resources;
- Aiming at building trust with the private sector as well as maintaining contact and fostering dialogue with the business community ensured a more demand-driven approach to project implementation design with sustainability in mind;
- Supporting, resilience (including the ability of newly exporting SMEs to maintain/grow their exports) with a particular attention to the achievement of sustainable results that would be beneficial to a significant number of enterprises and service providers beyond the duration of the project; has proved to be very important and
- having exit strategy, presented earlier (para 31, Section 2.1).

67. *When the project was designed, there was no specific requirement to align with the Market Systems Development Approach.*²⁸ *However, the full range of activities undertaken by ITC, including value chain development, market linkages, and BSO development, aligns with this approach.* For example, improvements in the regulatory field prompted by the Roadmap on Vine and Wine sectors helped to revive the sector and led to significant growth of MSMEs engaged in it. Also, the sectoral associations shared the knowledge gained through the project with the member companies that were not direct beneficiaries, Webinars were joined by many more companies than the direct beneficiaries.

68. *While the Project could do more in terms of continued attraction of new export -ready companies; its approach striking a balance between these and the existing pilot companies was sound.* Criteria for the MSMEs interested in cooperating with the project included a primary emphasis on companies that have established long-term cooperation with the project and

²⁷ The project supported berries sector since the beginning of the project in 2016 in three target regions (Kherson, Odessa; Mykolaiv). In 2017 ITC started an EU funded project focusing on berries sector in Ukraine (Ready2 Trade for Eastern partnership countries). To avoid overlapping the Ready 2 Trade project took over of trade fair participation for berries companies and after its closure in 2021, Phase II project supports the sector with the trade fair participation by the request of Berries Association.

²⁸ according to a [2018 evaluation of Sida's market systems development approach](#), Sida has mainstreamed an Inclusive Market Systems Development approach across its portfolio, encouraging all contributions to consider these aspects of sustainability. It emphasizes that as well as being a tool for accountability, RBM should be used to inform ongoing learning and adaptation (e.g. by applying the [DCED Standard for Results Measurement](#)). The DCED (Donor Committee for Enterprise Development) Standard is a framework that aids projects to clearly state the hypothesis and set indicators that are monitored regularly to demonstrate whether events are going according to plan

demonstrated a strong commitment to transformation, but also encouraging the new companies to join undergoing a complete cycle of development in alignment with the capacity building (see **Box 3**).

69. *The Project's approach to risk management plan was sound.*

The strong aspects of the risk management strategy included: (a) anchoring much responsibility with the private sector and BSOs to minimize the risks associated with potential shocks to the Ukrainian Government's budget and financial solvency; (b) Readiness- In the light of the COVID-19 pandemic - to change the implementation mode for some of the activities, in particular, shifting in-person trainings and advisory services to an online format to the extent possible (or postponed if not possible (e.g. in the case of trade fairs, that were cancelled in 2021)) while also

Box 3 Criteria for all SMEs, interested to cooperate with the project

- small and medium enterprise according to EU definition
- working in the following sectors fresh or processed fruit, vegetable, nut, berries
- legal entity (no private households)
- not less than 75% of Ukrainian ownership
- willing to export, invest resources in the export development (except wine companies)

providing (alternative) activities based on companies' priority needs; and (c) implementing activities regionally and in a modular fashion, so that the disruptions in one region would not affect the ability of project activities to continue in other areas of the country; and devising ways in which enterprises in such zones could continue to participate, with eLearning and facilitating their participation in the activities held in adjacent regions.

70. *The local project presence was essential for effective project implementation,* contributing to trust-building between the project and beneficiary companies, and to developing in-country capacities to manage projects of a similar nature. Having said that, after the opening of the geographical scope for the whole of the Ukraine, the fact that the project does not have a presence in Kiev may have played a somewhat limiting role in that it limits the ability of the interact in person with other donors and the Government in in-person settings.

71. *There are weaknesses in the project design too.* These include, in particular, not envisioning clear processes towards BSO capacity building. Secondly, the criteria for partner MSMEs should have been specified in the ProDoc, especially with regards to the level of financial support they receive in terms of trade fair participation depending on their size and trade volume.²⁹ And thirdly, there are weaknesses in the results framework (RF) including the absence of midterm targets; lack of clarity in terms of counting the number of people and MSMEs trained³⁰; several indicators not being SMART (e.g. Number of new markets accessed by SMEs), and not having impact indicators initially on employment and remuneration (added later)

²⁹ ProDoc p.12 only states that "On the enterprise level, the project will continue to work with the existing beneficiary SMEs, which demonstrate positive dynamics, to ensure that they reach the level of confidence necessary to ensure sustainability of their exports in target markets and generate sufficient income to invest into production and pay for services from BSOs. The project will scale up the number of SME beneficiaries by expanding geography and product coverage. Newly joined SME beneficiaries will undergo structure of Phase I."

³⁰ The project counts the overall number of participants in the training course (and this is how the indicator reads) and not the unique participants trained (who may have participated in several training courses)

72. *The inputs were overall adequate for achieving the planned results and intended outcomes, but in relation to its original design of covering 6 regions:* they were limited however in the light of the all- Ukraine coverage and 4 sectors.

73. *In the online survey conducted for this MTE, the respondents wished that the project included additional elements (see Quotes 2).* The following were mentioned: access to finance (A2F), more systematic structured advice on follow-up issues likely to arise after project events, like trade fairs; an online platform for information- and experience-sharing in specific sectors; opportunities for policy dialogue with Ukraine 's relevant national and regional authorities, and wider coverage of the project results

Quotes 2. Desires of the Project beneficiary SMEs and BSOs regarding the elements missing from the project design

.... assistance with access to finance for example business planning, due diligence procedures, credit application forms...

.... more systematic structured advice on follow-up issues likely arise after project events, like trade fairs...

...an online platform for information- and experience-sharing in the four target sectors (F&V, nuts and wine)

....

...opportunities for policy dialogue with Ukraine 's relevant national and regional authorities...

...wider coverage of the project results (in relation to SMEs/Business Associations/Chambers of Commerce)

Source: Online survey

3.2. COHERENCE

74. *Phase II was coherent with other ongoing -at the time of project design - ITC activities in Ukraine,* in particular- the "Eastern Partnership: Ready to Trade - an EU4Business initiative", which in Ukraine focused on berries and textile sectors³¹

75. *The project was coherent with other related development initiatives, active in Ukraine at time of project design* According to the ProDoc, at the start of the project Phase II there were a few donor assistance projects in the southern region of Ukraine, even less were active in the nuts and wine sectors. The ProDoc mentions, *inter alia*, the following:

- *Ukraine Horticulture Business Development Project (UHBDP), [2014 – 2022]³², with which the project closely collaborated in Phase I (and it continued in 2021, see Section 3.4 on Efficiency, under "Synergies").* UHBDP, funded by the Global Affairs Canada and implemented by the MEDA (Mennonite Economic Development Associates) with the total budget of CAD³³ \$16.5 million, operated in the field of improving production techniques assisted farmers in the Southern Ukraine (including with grants for the purchase of equipment);

³¹ The global project, which covered other countries too, aimed to help SMEs from Eastern Partnership (EaP) countries integrate into global value chains and access new markets with a focus on the EU. The intervention aimed to assist SMEs in producing value-added goods in accordance with international and EU market requirements; while linking them with buyers from global value chains and markets, in particular within the EU. As part of this process, the assistance was to improve sector specific services to SMEs along the selected value chains by strengthening the capacity of local BSOs. The two main project focus sectors were agro-processing, and textile and clothing.

³² <https://www.meda.org/projects/uhbdp/>

³³ Canadian Dollars

- [United States Agency for International Development \(USAID\) Competitive Economy Program \(CEP\)](#). Among other activities USAID CEP supports SMEs' participation in trade fairs, including in wine sector. There are no joint activities with the ITC Phase II, but one of the ITC project partners BSOs- the Association of Craft Winemakers of Ukraine, has participated in ProVine with the help of USAID CEP (see Section 3.4 on Efficiency, under "Synergies");
- [USAID Credit for Agricultural Producers, 2016 –2023](#)³⁴ that supported broad-based, resilient economic growth by strengthening the capacity of Ukrainian credit unions to expand agricultural lending to increase employment and income opportunities in rural Ukraine;
- [USAID Economic Resilience Activity \(ERA](#)³⁵) [2018 – 2023](#), supporting SMEs to mitigate the impacts of the conflict and reduce the reliance on oligarch-backed big businesses and trade with Russia., ERA, *inter alia*, supported selected value chains and innovative businesses to help them expand and find new markets (see Section 3.4 on Efficiency, under "Synergies");
- [USAID Agriculture Growing Rural Opportunities \(AGRO\)](#), 2019 – 2024³⁶, aimed at helping to accelerate the economic development of rural Ukrainian communities with the greatest need, through a better governed agricultural sector, which encourages more productive, modern, and profitable micro, small and medium sized agricultural enterprises that are successfully integrated into competitive markets both in Ukraine and internationally;
- [UNDP Strengthening SME business membership organizations \(BMO\) project](#), 2020 – 2023 (Phase II) aiming to accelerate the development of the SME sector in Ukraine by strengthening the capacities of the BMOs, thus enabling more effective operation and the sustainability of these organizations in the medium to long term, better services to their members (SMEs) and reinforcement of public-private dialogue; and

Quotes 3: Perceptions on the uniqueness of ITC project (survey)

....it delivers concrete results that make a difference in terms of strategic changes in the companies (preparation and implementation of activities) facilitates access to international and national expertise; enables networking with other SMEs and BSOs both in Ukraine and abroad; offers an opportunity to improve staff skills in trade-related issues; it helps access EU and global markets and establish long-term business linkages, and to enhance the image of your company; it provides adequate guidance in defining and prioritizing possible solutions for improving the economic conditions of your company ...

An SME

...it Contributes to Ukraine's business internationalization; visibility and credibility in trade relations; and to the development of Ukraine's domestic consultancy market; provides adequate skills in trade-related issues and helps in establishing partnership/dialogue with the business sector in the EU

A BSO

Source: The online survey

76. *There were other relevant development initiatives in Ukraine at the point when ITC project Phase II was being designed: the project document does not reflect on those, but there was coordination and information -sharing established e.g.*

³⁴ <https://www.facebook.com/USAID.WOCCU.CAP/>

³⁵ <https://www.facebook.com/ERAUkraine>

³⁶ <https://www.facebook.com/usaid.agro/>

- [Food and Agriculture Organization \(FAO\), the European Bank for Reconstruction and Development \(EBRD\) and the EU under its EU4Business initiative](#), have been helping Ukrainian producers tap into new international markets. Their support has covered everything from comprehensive market data and price analyses to training on market access requirements, logistics and business negotiations. It covers berries and fruits sectors³⁷. (see Section 3.4 on Efficiency, under "Synergies"); and
- [Import Promotion Desk of Germany \(IPD\) Special Programme for Ukraine](#)³⁸ active in Ukraine since 2018, in the product groups including Fresh Produce and Natural Ingredients, supporting producers in their entry into the European market. (with the "Ukraine Special Programme" established after the eruption of the war). There were no intentional/explicit synergies with ITC Phase II project but two companies that benefit from ITC support had benefitted with IPD support as well. (see Section 3.4 on Efficiency, under "Synergies")

77. *While some of the initiatives mentioned above also provide training and/or support for participation in trade fairs and Business -to -Business (B2B) matchmaking, the uniqueness of the ITC project was evident for the interviewees, namely its systemic approach.* The uniqueness of the ITC Phase II project was seen in its comprehensive approach in the sector development context that starts from the development of the Roadmaps (see [Quotes 3](#) and [Quotes 4](#)).

78. *During Phase II, the project was to continue to investigate opportunities for possible collaboration to build on each other's work and avoid duplication, ensure financial efficiency, and harness synergies. This, as well as synergies achieved with the development initiatives mentioned is discussed in the Section 3.4 on Efficiency*

Quotes 4 Uniqueness of ITC project as seen by the project partners (KII)

...There are other initiatives that support export of businesses in F&V and nuts sectors, but with ITC project we learned the things we didn't know, how to find partners, how to analyse the markets, how to prepare for the trade fairs, how to communicate with the potential clients, etc.

An SME

ITC project is unique in that it provides a complete cycle of services, starting from Roadmaps, training, plus study visits and preparation for and support with actual the participation in trade fairs

A development partner

Source: KIIs

3.3. EFFECTIVENESS

3.3.1. ACHIEVEMENT OF OUTPUT TARGETS

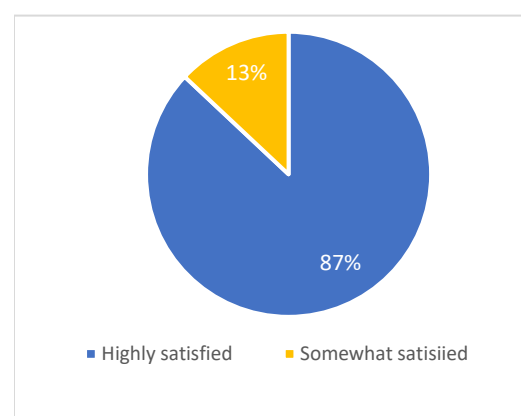
79. *The project achieved, or is expected to achieve most of its output targets for three out of four Outputs.*

³⁷ <https://www.fao.org/support-to-investment/news/detail/en/c/1187330/>

³⁸ <https://archive.newsletter2go.com/?n2g=pim0qb13-dtduz7s3-pky>

80. *The project was strongly affected negatively by adverse external factors, COVID and the war. As mentioned earlier, 62 percent of the MSMEs and half of the BSOs that the project supported before the war were not accessible after the war started. Many MSMEs have relocated, having lost part or all of their production facilities and staff. The state institutions were preoccupied with the war. The BSOs have waived or reduced their membership fees. Access to finance was prohibitively difficult. The international consultants that the project had engaged could not visit the country. And finally, there was a restructuring in the government: the Ministry of Agrarian Policy and Food was part of the Ministry of Economic Development and Trade of Ukraine (MEDTU) until 2020., and only for 1 year*

Figure 9 Degree of satisfaction with ITC support



Source: Online survey

81. *There were also certain subjective (internal) factors that impacted the project results. In particular, the project could have had a more effective communications strategy and a more structured way of BSO support.*

OUTPUT 1. ROADMAPS UPDATED AND/OR DEVELOPED FOR SELECTED VALUE CHAINS

82. *Two roadmaps were developed/updated as planned: for the Nuts sector and for the wine and vine sector. It was planned to update roadmaps for F&V; however, this was postponed due to disruption of the trade logistics prompted by the war.* The Roadmap for the F&V sector was developed in early 2016 and focused solely on southern regions. Therefore, it was concluded by the project team that its update would require significant efforts and data collection as the structure of internal production had changed significantly due to occupation and the destruction of numerous vegetable storehouses in the south, as well as the undermining of the Kakhovka Dam by Russian forces, resulting in the loss of irrigation in several regions. Because of all these challenges, it was considered that it might not be possible to work on updating this plan until the end of Phase II. The current MTE concurs with this conclusion.

Update of the Strategic Roadmap for the Nuts Sector (Walnuts and Hazelnuts)

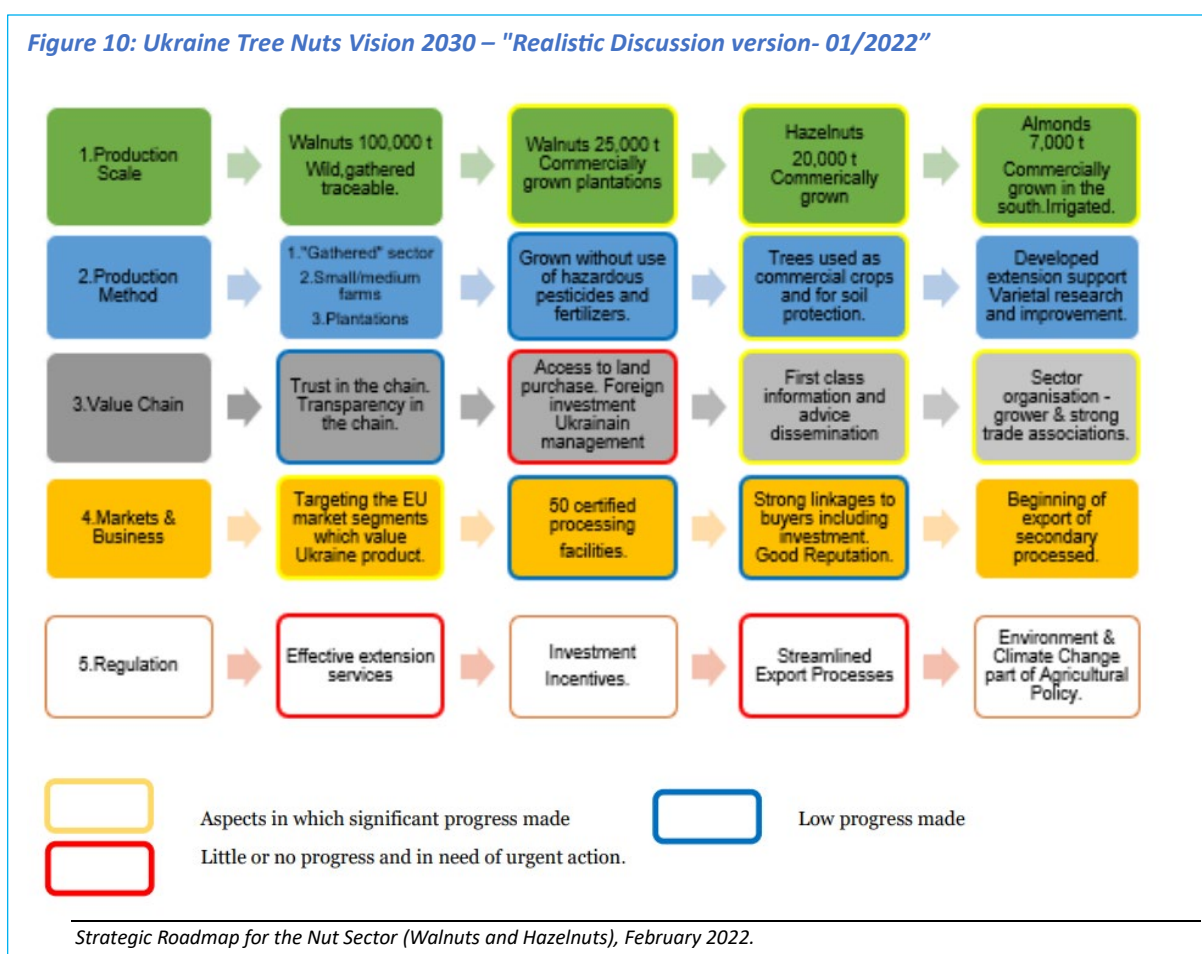
83. *The update of the Strategic Roadmap for the Nuts Sector (Walnuts and Hazelnuts) was finalized in February 2022, serving well the goal of the development of the sector.* The update of the Strategic Roadmap for the Nut Sector (Walnuts and Hazelnuts) was finalized based on the results of consultations with sector representatives and sectoral associations held at the end of 2021. The Ukraine Nuts Association (UNA)- the beneficiary of the project³⁹-is the home for the Roadmap and using it in its activities.

84. *UNA is working towards tackling the challenges of the sector in line with the Roadmap.* As could be seen from **Figure 10**, the areas with little progress made include lack of trust and

³⁹ <https://www.ukr-nuts.com.ua/en>

transparency in the Sector. The areas with slow/no progress include: lack of extension services; lack of streamlined export processes; lack of streamlined process for land purchase; Use of hazardous pesticides and fertilizers. The sector suffers from: lack of the sector strategy; inadequate quality control and certification system; complex legislative and regulatory environment; lack of qualified human capital with sector specific knowledge and skills; constrained access to finance., challenges in international positioning, changing the buyers' perception and increased margins for sellers in the context of the needed support with repositioning of walnuts produced at commercial orchards; challenges in re-focusing to direct selling (bypassing re-selling countries), etc. These are only some of the areas that the UNA aims to improve.

Figure 10: Ukraine Tree Nuts Vision 2030 – "Realistic Discussion version- 01/2022"



85. *By increasing the production area, Ukraine expects to reduce imports and provide the domestic market with its own nuts.* The Association plans to create the brands "Walnuts of Ukraine" and "Almonds of Ukraine", create registers of orchards, and certify them⁴⁰.

86. *Since 2020, UNA has a Program "SAD - PROCESSOR - EXPORT" that aims to bring together industrial nut orchards to produce high-quality export lots with identifiable varietal integrity and traceability.* The tasks (as they appear on the UNA website), include:

- Creation of a single Register of gardens and their certification;

⁴⁰ <https://east-fruit.com/en/news/20-of-nut-orchards-in-ukraine-will-be-organic-by-2030-forecast/>

- Cooperation of orchards for the creation of varietal uniform batches of high-quality nuts from industrial orchards;
- Association of industrial gardens, where nuts, hazelnuts, almonds are grown according to the "organic" system, in the ORGANIC NUT POOL (The UNA also plans to increase the share of organic nuts to 20 percent by 2030);
- Processing of nuts into nut products: butter, flour, pastes, sweets and confectionery, food ingredients;
- Quality control due to an increase in the share of sales of shelled nuts;
- Creation of regional enterprises for the primary processing of hazelnuts and almonds: cleaning, drying, calibration, splitting of nuts, blanching, etc.; and
- Organization of processing cooperatives, alliances, clusters in the main regions of Ukraine. Organization of high-quality storage and system supply for the country's trade networks or for export

87. *The cooperation of orchards is seen as necessary to create high-quality batches of hazelnuts and almonds and organize the processing of nuts – cleaning, drying, and sizing.* The development strategy for the hazelnut and almond sector also includes the launch of five hazelnut processing plants in the main regions of Ukraine (three enterprises are operating in Odessa, in the Khmelnytsky region, and in one of the central regions)

88. *UNA lobbies the Agrarian Committee of the Verhovna Rada to introduce legislative changes to stop grey/black exports⁴¹ (with improved regulations for the purchases from household growers⁴²). Beneficiaries started moving away from the former informal or "grey" trade.* At least one is now working on the development of the supply chain based on micro producers with an inbuilt traceability and organic certification, inspired by the ITC Nut Sector Development Roadmap. It may be the approach that sustains the sector and the small producers at a time when European markets are demanding greater transparency in accordance with the German Supply Chain Act which is predicted to be EU wide by 2025. Other successful changes include the development of new products, secondary high level value addition, improved orchard yields and food safety certification⁴³. Already there is a growing number of exporters in the nuts sector that work within the framework of the law: most are the beneficiaries of the project. Their stories could serve as examples for the others, but for that this needs to be captured and publicized. [NB: the need for this is highlighted also in the Roadmap for the Nuts sector, see Section 3.4 on Efficiency]

89. *UNA also lobbies the Government for certain support programs to be effectuated (i.e. they exist on the paper only after the war).* This is related to the compensation for a certain

⁴¹ Lack of walnuts traceability incentivizes falsified certificates of origin, "grey" exports with proceeds to offshore accounts, which presumably results in significant share of taxes and customs fees not received by the state. The pricing for these walnuts would be lower compared to fair market levels, as the price does not incorporate taxes and other obligatory payments

⁴² In Phase I the project assisted this process by engaging an expert to draft the proposed changes

⁴³ Note of the IC, James Fitzpatrick to the NPM

percent of equipment costs; before the war there was a program of receiving back, among others 80 percent of the costs of the seedlings, 30 percent of equipment, etc.⁴⁴.

90. *While most of the initiatives that UNA tackled had started before the ITC project supported/updated sector Roadmap, the latter greatly contributed to the conceptualization of the ideas.* The Roadmap itself benefitted from the training and Study tours (see later in this Section). The efforts are already producing concrete results (see Section 3.3.2 on the Achievement of Outcomes).

Roadmap for the Wine and Vine Sector was developed in 2022

91. *The Roadmap for the Vine and Wine Sector was developed in 2022, focusing on policy, sector development and capacity building recommendations, and proved to be transformative for the development of the sector* (see **Quote 5**) The roadmap for the Vine and Wine sector was developed using the value chain approach and priorities set in cooperation with relevant stakeholders and producers. It allowed to identify trade-related constraints faced by MSMEs, gaps in BSO services, and to develop measures to boost the competitiveness of the sector. The development of the Roadmap for the Vine and Wine Sector benefitted from the participation of the sector representatives in the study tours to Moldova, Georgia, Armenia, France and Italy (see later in this Section on Study Tours).

Quote 5: The role of the support to wine and vine sector

...Support of the project to the wine sector- with training, direct assistance to companies, study tours and the Roadmap, was catalytic. There was a strong growth of small winemakers in the country

A BSO

Source: KII

92. *In December 2021, two (2) MoUs were signed: (a) between the All-Ukrainian CCI and several wine associations (including the Association of Black Sea Wine Crafts Producers; the Association of Craft Winemakers of Ukraine)⁴⁵; and (2) between (UKRSADVINPROM) with the Ministry of Agrarian Policy and Food⁴⁶. The latter defined eight points to move forward on following the recommendations from the Roadmap* (for the latter see **Box 4**), namely:

- a. creation and promotion of the national brand "Ukrainian wine", which is the prerogative of the state and is regulated by the relevant order;
- b. production of Ukrainian wine exclusively from grapes grown and processed in Ukraine;
- c. introduction of the State Register of vineyards and wine-making products, which provides for mandatory entry of information about grape plantations from 0.15 ha;

⁴⁴ There is a State program of support of planting new orchards. According to the program the farmers can apply for the compensation of seedlings, building of cool storages and processing equipment [Уряд оновив механізм державної підтримки розвитку садівництва, виноградарства та хмелярства | Міністерство економіки України \(me.gov.ua\)](https://me.gov.ua)

The program is financed from the state budget. The budget is identified each year, but the sum is always different. Additionally, there is the resolution of the Cabinet of Ministers, [Деякі питання надання грантів дл... | від 24.06.2022 № 739 \(rada.gov.ua\)](https://rada.gov.ua), according to which, processing equipment for initial treatment (washing, drying, cracking etc) is not included. UNA and other associations are lobbying to include this initial processing equipment in the State program. Also on the page of the President of UNA, Gnnadii Yudin on [Facebook](https://www.facebook.com/una.gov.ua)

⁴⁵ [У ТПП України підписано Меморандум про підтримку змін у виноградно-виноробній галузі \(ucsi.org.ua\)](https://ucsi.org.ua).

⁴⁶ [Мінагрополітики співпрацюватиме з об'єднаними асоціаціями виноградарів та виноробів України | Кабінет Міністрів України \(kmu.gov.ua\)](https://kmu.gov.ua)

- d. creation of a system of traceability of wine products from the vineyard to the bottle based on three declarations: harvest declaration, production declaration, residue declaration;
- e. approximation of domestic tax legislation to EU legislation in terms of the definition of wine products, as well as the introduction of provisions on excise tax rates and exemption from excise tax on wine, other non-carbonated and sparkling fermented beverages, based on the provisions of Directive 92/83/EU "On Harmonization of Structures of excise duties on alcohol and alcoholic beverages" dated October 19, 1992;
- f. cooperation and representation of Ukraine in the International Organization of Grapes and Wine (OIV);
- g. full laboratory control of wine products produced in Ukraine and imported into the customs territory of Ukraine; and
- h. Ensuring fair competition, countering the sale of falsified wine products, as well as presenting at least 50 percent of relevant retail space for the "Ukrainian wine" brand.

Box 4: Recommendations for the development of the Vine and Wine sectors from the Roadmap

GRAPE GROWING, VITICULTURE and REGIONAL ZONAGE

- To create a state Wine Register which would keep records of all areas under vineyards, their ownership, age and condition, cultivated grape varieties, PGI and PDO registration and other relevant information. A future Wine Cadastre should identify how many hectares are under vine per region and how the climate change influences the areas.
- To engage several international experts or to collaborate with international research centres/universities, specialized in pedoclimatic researches and zonages for winegrowing regions. To pay attention to similar climate regions (Moldova for Odesa region, Czech Republic, Poland and other for more norther regions with cooler climate).
- To initiate and develop educational programmes for winegrowers, organise study visits and exchange of experience.
- To implement a system of adequate phytosanitary control in vineyards.
- To analyse regional specifics of winegrowing and request necessary state support.

PRODUCTION & VALUE CHAIN EFFICIENCY

- To develop an annual harvest, vintage and stock report, based on grape growers' and wine producers' declarations. This information can be introduced and stocked in the state Vine and Wine Register.
- To initiate a National Wine Research Programme focusing on varietal componence of vineyards including indigenous varieties, involving local research institutions like Tairov Institute and in collaboration with OIV and international specialized institutions.
- To undertake the classification of the national vineyard surface described above to inform future decisions about suitable grape varieties.
- To study genetic provenience of Ukrainian Indigenous varieties in terms of new technologies.
- To ensure strict enforcement of regulations preventing unsuitable hybrid grapes from being used for house wine and table grapes from being sold for wine production
- To initiate and develop educational programmes for winemakers.
- To organise a degustation panel involving local and international experts in order to evaluate the export potential of locally produced wine from both international and indigenous grape varieties

PROMOTION AND (EXPORT) MARKETING

- Introduce smart measures to protect local producer (30% of shelf space, etc.).
- Increase appreciation of domestically produced wines (e.g., National Wine Day, producer roadshows, wine trade fairs).
- Select target countries interested in Eastern European wines and to focus on export promotion. To investigate and agree on the first three target export markets for Ukrainian wine.
- Develop image and recognition building export strategy.
- Develop wine tourism conference to exchange knowledge between regions and create a national wine tourism strategy.

SUPPORT SERVICES AND QUALITY & COMPLIANCE

- Harmonise with the EU regulations in Quality & Compliance system.
- Develop more transparent state Quality & Compliance system in terms of responsibilities and procedures
- to stimulate the growth of quality, production and export instead of creating additional barriers to the industry.
- Found the Central Laboratory and the net of regional laboratories, trained and equipped according to modern requirements.
- Plan programme quality & compliance workshops for the sector to improve knowledge and understanding of the international requirements in wine growing and production.
- Ukraine is to join the OIV.

STAKEHOLDERS ORGANIZATIONAL STRUCTURE

- Share Roadmap and recommendations with all NGOs to explore project opportunities assisting the wine sector.
- Establish a national wine association that represents the entire sector. Agree on a funding model that will allow staff to represent and deliver services to the sector.
- Create a National Wine Brand – Wine of Ukraine – that would serve as an umbrella for all quality wine producers from Ukraine.
- Producers should cooperate to win the hearts of Ukrainians over the interest for imported wines.

SUSTAINABLE PRODUCTION

- Create a national sustainability programme.
- Develop a series of modern winemaking workshops for all Ukrainian wineries.
- Organize a national conference on sustainability, best suitable and indigenous grape varieties

93. The reason for signing two MOUs was that the Minister could not sign the first version. They signed shorter version, without the paragraph about the creation of Office of Vine and Wine and Additional tax proposed by sector association to be used for sector development. The Ministry of Agrarian Policy cannot create a new state agency as it is the responsibility of the Cabinet of Ministers, also they cannot approve introduction of new taxes, as it is the responsibility of the Minister of Finance

94. *Renewing Ukraine's OIV membership was one of the recommendations of the road map for the Wine Sector that is now achieved.* Ukraine's OIV membership was renewed in 2021 with the facilitation of ITC experts. It was officially announced on 4 November 2022 during the 43rd World Congress of Vine and Wine held in Ensenada, Mexico. This membership allowed Ukraine to join the latest research in the field of climate change and sustainable development; harmonize legislation; provide quality control of wine production according to OIV criteria; gain access to communication with a broad group of experts in different fields of viticulture; and participate in working groups in oenology, viticulture, safety, and health.⁴⁷

Photo 2 Renewing Ukraine's OIV membership



Source: Project Annual report 2022

⁴⁷ The group of representatives from Ukrainian research institutes and private businesses participated in the 44th edition of the World Congress of Vine and Wine, focusing on the theme "Viticulture and Information Technologies. organized by the International Organization of Vine and Wine in Cadiz, Spain, on 5 -7 June 2023. Ukrainian researchers (Oksana Tkachenko and Volodymyr Kucherenko) were able to participate in the working groups and give short presentations

95. In 2024 the state included in the state budget 35.5 million hryvnia was included in the state budget) on the basis of Tairov Institute of Viticulture and Winemaking» National Academy of Agrarian Sciences of Ukraine.⁴⁸

96. *Additionally, several important legislative/regulatory changes were made, aligned with the Roadmap.* The latter include:

- The Verkhovna Rada of Ukraine has adopted amendments to legislation that simplify the registration and operation of the winemaking business. The relevant *draft law (No. 9030)* was supported by the people's deputies of Ukraine in the second reading and in general at a session on August 9, 2023. Simplifying business registration for winemakers was recommended by the Interagency Working Group on Deregulation, co-chaired by the First Deputy Prime Minister of Ukraine. In particular. The need for small wineries to obtain a license for the production of alcohol is canceled. Instead, the Register of Small Wine Producers will be created⁴⁹;
 - ✓ the requirements for the material and technical base of small wineries will be reduced;
 - ✓ instead of monthly reporting, producers will submit annual reports;
 - ✓ the bottling of wine and wine beverages in metal cans and kegs (as is customary in Europe and the United States) is allowed;
 - ✓ streamlined licensing, is introduced;
 - ✓ administrative penalties were removed;
 - ✓ a provision for minor producers to purchase grapes for a much-reduced license fee; and
 - ✓ support for winemakers.
- The Verkhovna Rada also supported the *draft law "On Grapes and Viticulture Products" (No. 9139)*. After the law is adopted and comes into force, the relevant legislation will be brought into line with EU standards. In particular, the following will apply:⁵⁰
 - ✓ terms and definitions, classification of grape varieties and requirements for the production of viticulture and winemaking products will be unified
 - ✓ a mechanism for the protection of geographical indications in Ukraine will be defined;
 - ✓ the creation of a single state Viticulture and Winemaking Register was approved;
 - ✓ the possibility of state support for viticulture and winemaking is provided; and
 - ✓ the principles of conducting inspections of winemaking production were established, controlling institutions and their powers were recognized, and sanctions for violations of the law were specified; and
- In 2021, a significant milestone was achieved with the removal of the still wine excise mark.

97. *Thus, the Roadmap helped to catalyze the development of the sector, while indeed there were other contributing factors too,* like the DFCTA and the surge in the interest in Ukraine

⁴⁸ <https://www.tairov.org.ua/en/>

⁴⁹ <https://www.kmu.gov.ua/en/news/sproshchuiemo-vedennia-biznesu-litsenzii-na-vyrobnnytstvo-alkoholiu-dlia-malykh-vynorobnykh-pidpriemstv-skasuvaly>

⁵⁰ *ibid*

wines from other countries as a means of solidarity with Ukraine, as well as the earlier reforms back in 2018.

98. *The project closely engaged most of the stakeholders in the process of the development of the Roadmap, especially to ensure that it is derived from market perspectives.* The close interaction with the private sector representatives and relevant expertise contributed to a better understanding of the private sector's needs and create an environment that allows challenges to be discussed openly and priorities set in a consultative manner.

99. The expected results of Output 1 were achieved:

- *"the number roadmaps/strategies developed/updated and endorsed by stakeholders"* (achieves, see **Table 5**), as well as
- *"the increased capacity of relevant stakeholders and local authorities to understand and set strategic priorities for the development of the sectors concerned"*. There is no indicator to capture this, but it could be claimed that since the development of the Roadmaps was a consultative and participatory process, those engaged in it, learned useful practices in how to analyze sectoral priorities and set action plans.

Table 5:: Achievement of Output 1 targets, self-report

Indicator	Target	Total cumulative to date	Narrative
Number of value chains analysed	2	2	Wine and nut sector value chains
Number of roadmaps (intervention strategies) developed/updated	2	2	The roadmap for the wine sector was developed in 2021; the roadmap for the nut sector was updated in 2022. Some minor updates were made to the wine sector roadmap in 2023 related to the liberation of Kherson and Mykolaiv wine regions

OUTPUT 2. CAPACITIES OF SMES STRENGTHENED TO IMPROVE THEIR INTERNATIONAL COMPETITIVENESS.

100. *The project, as planned, assisted selected SMEs from the target sectors to reinforce and enlarge their presence in the market and increase export* (not targeting vine and wine sector companies for the latter). For all product groups, including vine and wine, the focus included improving the capacity of MSMEs to meet EU market requirements (mandatory and voluntary) including food safety, environmental management, and sustainability standards.

101. *The project, enhanced MSME capacities through a three-fold approach: with training; direct assistance and study tours.* The latter is covered under Output 4.

A) Training

102. *The training covered a wide variety of topics, which could be divided into two main subgroups: (a) Preparatory workshops for trade fairs; and (b) building competencies in growing, harvesting, post-harvesting, packaging, logistics, marketing and sales, branding, CSR, as well as in business planning and management* (see Annex 3: Training Courses). In particular, the topics covered:

- Technology:
 - ✓ hazelnut cultivation and postharvest handling, hazelnut protection, pruning; Hazelnut Processing and Harvesting, Nut Waste and By-Products Usage and Exploitation;
 - ✓ application of the principles of sustainable development in viticulture and winemaking; grape wine production techniques in terms of quality and compliance control during the fermentation process, processing and stabilization of wine materials, wine bottling, blending and storage; and
 - ✓ mandatory and optional winemaking equipment
- Standards: Quality & Compliance in the wine sector; Farm Certification according to GlobalG.A.P. International Standard;
- Analytics: export/import statistics navigation and analytics, ITC market research tools market information systems for Ukrainian growers, processors and exporters of edible nuts, walnuts and hazelnuts in particular, offering a practical guide to global markets and market information; Overview of Austrian and Californian wine markets
- Export planning and international business networking; basics of export marketing improvement and development action planning;
- Sales regulations: importance of incorporating the principles of traceability, sustainable viticulture and efficiency in their daily practices; wine labelling and packaging regulations applied in the EU for wine producers;
- E-commerce;
- CSR: GRASP – Social Responsibility Certificate for the European market; and

103. *The number of participants in the training events varied depending on the nature of the events.* For instance, the meetings with the UNA included vision exercises for their management team comprising 2-3 persons and individual sessions with the head of the Association. On the other hand, there were webinars that attracted approximately 20 participants. Additionally, the project offered individual consultancy to a select few associations, namely UNA and UkrSadVinProm.

104. *The interviewees were in their majority satisfied with the training courses; some wished they were differentiated by the level of complexity.* Most highlighted the relevance to their needs, the quality of the experts, the fact that the webinars were recorded and later the recordings were sent to them. Many highlighted that they implemented the recommendations that were made during these webinars (see at the end of this Section on Output 1). There were however several comments from the experienced (in exporting) companies on the topics related to marketing and sales, who commented that these topics were interesting for them when they were new to exports – and some of them have been with the project for about 7 years- – but not anymore. Further probing into this with the local expert community indicated that it is advised that – if the project has a continuation- to differentiate the training by the level of complexity.

105. *The project used predominantly their Facebook page (as well as the closest 5 BSOs (see next Chapter) to make announcements about the upcoming training events (see Figure 11 and Figure 12). There could also be wider outreach/ announcements about the webinars, using the resources of the other associations that the project is not working closely, extension services, regional administrations, and also via LinkedIn and Instagram (see Section 3.4 on Efficiency).*

Figure 11: Example of a call for training for wine producers



Source: the project's FB page

Figure 12: Example of a call for training for nuts sector



106. *The project assessed the level of satisfaction after each webinar⁵¹, but the summary statistics was not available (see Box 5 for the questions asked). The evaluator was provided with 2 samples of the rating sheets in excel, for them*

- Training in viticulture and winemaking: the average rating for the usefulness was 4.6 and the experience 4.3
- E-commerce: experience rating average 4.5

107. *The recordings of the webinars are sent only to the webinar participants. Sending them to wider audience could be considered, with better sustainability and scale -up prospects than just placing these on YouTube, e.g. through other sectoral associations (see next Chapter), National Association of Agricultural Advisory Service (NAAAS)⁵², consulting companies active in advising exporters engaged in agribusiness⁵³, etc. (see Section 3.4 on Efficiency)*

Box 5: Questions used by the Project team to Assess the satisfaction with the Webinars

1. In which region do you work?
2. Were you interested in participating in the wine tourism training cycle?
3. Do you consider participation in this cycle of trainings useful for your business?
4. Did you manage to improve your knowledge of wine tourism?
5. How do you evaluate the general organization of the educational cycle?
6. How would you rate your experience of participating in the series of webinars on a scale of 1 to 5?
7. What topics covered during the webinars were the most useful for you?
8. What other topics are of interest to you that were NOT covered during the webinar series?
9. Do you consider assistance to the ITC project useful, and would you like to receive it in the future?

⁵¹ The examples of the training assessment forms are available at these links: <https://forms.gle/vwzLhcEEhRppDx9LA>; <https://forms.gle/5ue5m8hhgfZU6BUb7>; <https://forms.gle/n6bbRLy3A6rhTf198>

⁵² <https://dorada.org.ua/en/zagal-na-informaciya>

⁵³ Companies, like UkrAgroConsult (<https://ukragroconsult.com>) Agroconsulting (<https://agro-consulting.com>); Empower-agro; etc.

B) Advisory services

108. *Direct assistance with coaching and advisory services to selected companies often resulted after the training sessions.* The focus on these was enhanced following the recommendation from the MTR of Phase I. These were led both by the international and local consultants. Some of the topics covered included (see **Table 6**)

- adapting marketing materials, negotiating new deals,
- development of the concept in sustainable walnuts
- implementing the international food safety system
- individual Export Action Plans
- individual marketing and development action plans, and
- market requirements

Table 6: Complete list Direct Assistance provided

Year	Topic
2021	
1	advisory services and coaching sessions to 25 project beneficiary SMEs on adapting marketing materials, negotiating new deals, as well as on hazelnut cultivation. In addition, the project provided direct support to companies during their preparation for participation in trade fairs and in B2B meetings
2022	
2	advisory services and coaching to 17 project beneficiary SMEs on, negotiating new deals, specific practical issues related to individual export marketing improvement and development action plans, hazelnut cultivation, nutrition and pruning, as well as organic walnut production.
3	Six (6) SMEs growing hazelnuts benefited from the field visit and masterclasses conducted by Dr Ross Penhallegon, an Associated Professor from Oregon State University (USA).
4	Three (3) fresh F&V companies received individual consulting in implementing the international food safety system, which consisted of pre-assessment of the farms for compliance with the requirements of GLOBAL G.A.P. The companies will be internationally assessed during the 2023 harvest.
5	One organic walnut grower benefitted from assistance on market requirements: how to market the product in the EU market and the short market overview of the Scandinavian organic market.
6	Three F&V exporters had a series of individual online meetings where, under the guidance of ITC consultants, they analysed market trends as well as potential markets for export using ITC online tools
7	Four (4) nut exporters prepared individual Export Action Plans under the guidance of the International Consultant (IC), James Fitzpatrick, with the support of the National Consultant, Oleksii Yerokhin. The Russia-Ukraine conflict's impact on the companies has disrupted the coaching, resulting in communication difficulties and especially uncertainty regarding supply from the 2022 harvest for beneficiaries and buyers. Nonetheless, the coaching has been worthwhile for four companies, which have made outstanding progress and re-started the discussions at the end of 2022
2023	
1	advisory services and coaching to 20 project beneficiary SMEs on, negotiating new deals, specific practical issues related to individual export marketing improvement and development action plans, hazelnut post-harvest and processing, nutrition and pruning, as well as organic walnut production.
2	Following the training in EU labelling, three (3) project beneficiary wine producers (Bilozerskyi, Beykush Winery and Frumushika-Nova) were provided individual advisory on wine label design in accordance with EU regulations
3	One walnut exporter Nutsee under the guidance of the international consultant started the development of the concept in sustainable walnuts – Slow walnuts https://www.slowwalnuts.com/ . IC provided technical support to turn the concept into a detailed, market-oriented business planning to develop the project export marketing plan as part of the full business plan.
4	Four (4) nut exporters finalized the individual Export Action Plans under the guidance of the International Consultant (IC), James Fitzpatrick, with the support of the NC Oleksii Yerokhin. The Russia-Ukraine conflict's impact on the companies has disrupted the coaching, resulting in communication difficulties and especially uncertainty regarding supply from the 2022 harvest for beneficiaries and buyers. Nonetheless, the coaching has been worthwhile for four companies, which have made outstanding progress and re-started the discussions at the end of 2022

C) Study Tours

109. *There were several study tours for the wine and vine sector and nuts companies and BSOs, which greatly contributed to the development of the sectors* (see **Box 6**). These included:

- ❖ *a guided tour to the ProWein trade fair, 15-17 May 2022, Dusseldorf, Germany*, for five (5) small winemakers to get acquainted with the latest trends in the wine sector, such as sustainable winemaking and organic production;

Photo 3 Study Visit for Hazelnut Growers to Georgia



Source; Annual Report 2023

- ❖ *Study visits to France and Spain for a delegation of 14 Ukrainian small wine producers, BSOs and the representative of the MAPFU, responsible for the wine sector* 28 May – 4 June, 2023 to contribute to learning by Ukrainian stakeholders of the best European practices of sustainable vine-growing and winemaking and facilitate their practical experience exchange with European enterprises and organizations. As discussed earlier, these visits were an important factor in the changes that were witnessed in the vine and wine sector, leading to the growth in the number of SMEs engaged in the sector. The presence of the Government representative was very important for the latter. The participation of the representatives of V. Ye. Tairov Institute of Viticulture and Winemaking in study tours was also beneficial as they learned on how to improve their services, e.g. in relation to laboratory testing, as well in terms of organizing wine tasting events (as they have a small winery under the Institute); and
- ❖ *The study tour to Georgia of the delegation of Ukrainian hazelnut growers (10 SMEs) and the UNA led to several of these companies adopting new practices. The study tour took place 5 June – 10 June 2023.* The aim was to learn the best practices of hazelnut post-harvest handling, processing and storage (see [Section 3.4](#) on Synergies) The feedback from the participants was very positive during the debriefing meeting held on 9th June, as well as for this MTE. The fact that one of the key international consultants was present during the study visit was very important, as this was a chance to demonstrate some of the issues that were presented in the webinars, in practice. The UNA established direct contact with the Hazelnut Processors and Exporters Association of Georgia, the Georgian Hazelnut Growers Association and the Hazelnut Farmers Union for regular information exchange during the study visit of Ukrainian hazelnut growers. Both Georgian and Ukrainian parties agreed to exchange the information in areas of improving the growing methods, modern methods of irrigation, pest and diseases treatments other technological aspects

Box 6: Study Tours in Vine and Wine Sector that informed the Roadmap and policy changes

In 25-29 October 2021, the project organized a study tour to Moldova to introduce the Compliance and Quality control systems, established in Moldova, for the selected project beneficiaries. This included the following:

- a. the role of state institutions in the whole process of certification and quality control;
- b. wine production licensing, turnover control and taxation systems;
- c. laboratory control of wine, including the regulations, equipment and software; vineyard registration, meeting with the responsible bodies;
- d. PGI system, meeting with representatives of the Associations administration, discussions about membership and requirements. System of quality control and regional tasting;
- e. Visits to small-medium-big wine producers with a purpose to learn how private businesses deal with quality control and implement food safety requirements on site.

During the study visit, all planned meetings, presentations and discussions with public/state and private institutions took place with the participation of high-level representatives of the Ministry of Agriculture and Food Industry of Moldova, the National Agency for Food Safety (ANSA), the Central Testing Laboratory of Alcoholic/Non-alcoholic Beverages and Canned Products, the National Office for Vine and Wine (ONVW), the Association of Small Winemakers of Moldova. The participants also visited several small and medium-sized winemaking companies to see how the quality control system works at the enterprise level.

From 23 October to 2 November 2022, the project organized a study tour to Armenia and Georgia to introduce the selected project beneficiaries to the existing compliance and quality control systems in these countries, including the following: (a) Role of the state institutions in the whole process of certification and quality control; (b) Wine production licensing, turnover control and taxation system;

The project organized a study visit for delegates from the Ministry of Agriculture of Ukraine to Moldova in response to a formal request from the Deputy Minister of Agrarian Policy. The primary objective of this visit was to assist Ukraine in the adoption and implementation of the Vine and Wine register, a critical prerequisite for aligning with European Union (EU) standards in the field of winemaking. The overarching aim was to draw upon Moldova's experiences and expertise to identify strategies for enhancing the future effectiveness of Ukraine's Vine and Wine Register. The delegation comprised five representatives from the Ministry of Agriculture, along with one representative from the Tairov Research Institute, which played a pivotal role in the development of the Vine and Wine Register.

Photo 4 Study Visit for the Ministry of the Agrarian Policy and Food of Ukraine to Moldova



Photo 5 Study Visit for Vine and Wine SMEs to France and Spain



Source; Annual Report 2023

110. *There are many examples of the companies adopting the learning they received during the training or as a result of direct assistance (as well as training and study tours). This is done by national consultants approx. 6 months after the study tours and Trade fairs, but not for the training events/webinars: the project would benefit from a more systematic way of capturing and reporting on these (especially from the training), see below.*

111. *According to the project's Annual Reports and KIs for this report, there are many examples of the improvements in the processes and practices of the companies, including (see also Quotes 6):*

- Nuts:** One company which implemented a new cutting method reported an increased number of buds on the trees by up to fifty percent (50 percent) compared to standard pruning practices, implying that they will receive a higher yield within the next two years (source: Annual Report). Four (4) hazelnut growers (GALS AGRO, FILBERT LLC, CONTINENT, Agricultural LLC, Nuts & Garden Farm started to implement the best post-harvest (processing) practices and purchased additional equipment for storage, drying, cracking the hazelnuts as a result of the study visit to Georgia. There are other examples from the nuts sector, that were obtained as part of this MTE, e.g. Nute-See introduced the organic brand having received the advice from the International Consultant (IC) of the project; and Filbert opened factories for processing (something they did not plan before) and this turned out to be the best decision. Filbert also used the advice regarding caramelization, etc.
- Vine and Wine.** Ten (10) wine producers reported improvements in the following areas: quality of wine production, implementations of sustainable practices in the vineyards, good practices how to improve the conditions for tourists' entertainment. (source: Annual Report). There are other examples from the wine and vine sector, that were obtained as part of this MTE, e.g.: Don Alejandro Winery introduced a practice of producing vinegar from the wine which was below the desired quality (now they produce also vegetables marinated in vinegar; the company "Wine Idea" implemented learning from study visit related to blending and storage in Acacia- made barrels; the company "First winemaking station" learned from the seminars how they can capitalize on tourism , using the advantage their location in an old building to their advantage, etc.;
- F&V:** The company "Sadi Donbassa" reflected in the interview that they learned how to use Trade Maps from the project and now use it in their work; they also learned simplified method of QR codes and how to create mini – sites

Quotes 6: Perceptions on the effects of capacity building for the SMEs

...The potential of the company has grown significantly, the outlook on the development of the enterprise as a whole has expanded...

...The ITC project has offered us a unique opportunity to learn new concepts and be represented at the international level...

...Managers gained skills in presenting the company, assessing potential markets, preparing for trade fairs, interacting with clients, and independently creating a concise website for instant offers...

The company has enhanced its proficiency in working with international statistical databases, establishing a consistent process for monitoring markets and business conditions...

Source: the online survey

112. *Training, advisory services and study tours led to the beneficiary enterprises/producers getting a better understanding of the market requirements, implementing changes to improve their international competitiveness, introducing quality standards as well as adjust products to the needs of the target markets.* As could be seen from **Figure 13** and **Figure 15**, the vast majority of both the SMEs and the BSOs rated the extent of their capacities build as relatively high. They also in their majority rated the extent of their processes being improved as "to a large extent" or to "some extent"

113. *For this Output the project is likely to achieve all but one of its targets.* In **Table 7**, the only indicator where the project fell short of the target for Output 2 is ". the number of advisory

services”, which could be explained by the consequences of the war, given that international consultants cannot travel to Ukraine and there are restrictions for the travel for local consultants too, and there is only so much that is possible to do remotely.

Figure 13 Extent of capacity building

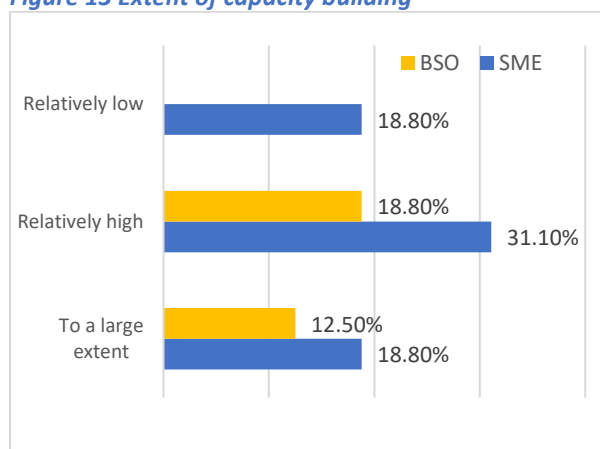
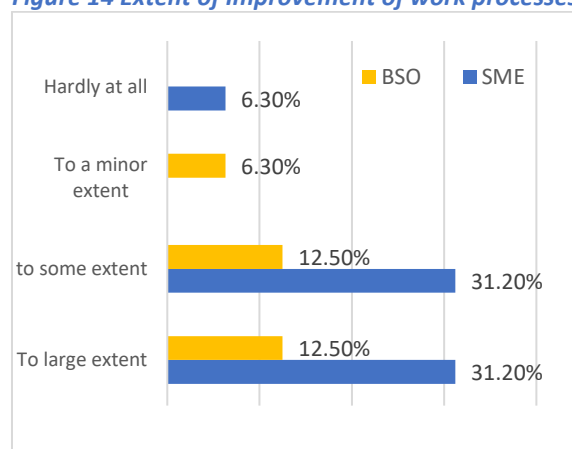


Figure 14 Extent of Improvement of work processes



Source: Online survey

Table 7 Achievement of Output 2 targets, self report

Indicator	Target	Total cumulative for May 21 – Dec 23	Total cumulative to date (on the annual basis) *
Number of training courses, seminars and workshops conducted.	14	76	76
Number of advisory services provided (by specific technical area)	12	10	10
Number of SMEs trained.	70 *	309 (unique)	361 (unique) 1242 (aggregated) *
Number of SMEs trained that are women owned/operated/controlled or with majority women employed	20*	40 (unique)	40 (unique)
Number of participants in workshops.	400	551 (unique)	2139 (aggregated) *
Number of women participants in the workshops.	60	238 (unique)	767 (aggregated) *

* the targets were set having “aggregated” figures in mind, i.e. if a certain company participated in 3 training events, it counts as 3

OUTPUT 3. CAPACITIES OF SECTORAL BSOs STRENGTHENED TO PROVIDE SMES WITH RELEVANT BUSINESS SUPPORT SERVICES.

114. *The project continued its efforts to enhance BSOs capacities and enlarge their service offerings to SMEs and assisted in developing operational and managerial performance, but the results fell short of expectations for both external and internal (objective and subjective) reasons.* The scope of BSOs capacity building was to cover supply chain management, quality assurance and certification, trade intelligence, market analysis, and research, sales, export strategy. Much less was conducted: only the following two (a) Training in Vision and Action Plan preparation to achieve the vision for the organization; for UNA and (b) Workshops in pruning for UNA. But it should be mentioned the capacity building activities are not limited to the training only

specifically for the BSOs, but also to involve BSOs in SMEs trainings when subject areas are of relevance for BSOs. For example, the project conducted training on market analysis and research for SMEs on July, 6-7, 2021 with involvement of three BSOs (UkrSadVinProm, Vinnitsa club of business people and VinnitsaSadVinProm). A few of the BSO commented in the interviews for this MTE that they use ITC tools in their work, and attributed it to the project (see **Quotes 7**)

Quotes 7: Effects of the capacity building and raining for the BSOs

.... Thanks to the project, we have mastered ITC market analysis tools. Today, we provide the business with consulting services applying these tools....

....TradeMap data streamlines the preparation of reviews and reports for clients.

Source: the online survey

115. *During the Phase I there was training for the BSOs on strategic plan development; continuation under Phase II was affected by CIVID and war, and implemented only for the nuts sector.* There was an international consultant on association building, who was supposed to continue this in Phase II, but due to COVID and then war, the plans were halted. The project could not also identify a good national consultant to take over. Remote training was considered as not optimal. But also, the project assessed that after the COVID and during the war the relevance of the proposed activities have diminished as some BSOs found themselves in conflict zones and stopped operations, others changed the priorities. And finally, the project assessed that they need experts that are not just experts in association building, but have also experience in specific sector, like vine and wine, F&V, as was the case with the nuts sector. Once the war ends, and in case there is a follow up funding, this will need to be continued.

116. *During the Phase I there was a training on "Harvesting Market Potential" for consultants who can assist SMEs with market research in the future, as a training of trainers (ToT).* This was for the consultants who at the time worked with the BSOs. In the future training events the project could consider inviting private companies who provide advisory services related to agriculture exports to join,

117. *It was expected that at the end of the project at least six partner BSOs will improve/develop new service portfolio and develop operational capacities; sectoral SMEs will appreciate and value the services and will be willing to pay for them; knowledge-sharing platforms will be established and better coordination among BSOs will be ensured.* This target, as well as other targets for this Output is unlikely to be met, for both objective and subjective reasons (see **Table 9**). One of the reasons is of course the impact of the war and the fact that the number of the BSOs with which the project worked shrank. According to the 2023 Annual Report: "Despite the sustained continuation of project activities and the expansion of geographical coverage, it is important to acknowledge that the attainment of targets at the BSO level may not be fully realized. This is attributed to the adverse impact of military operations, which has led to the cessation of operations by certain regional chambers with whom we had initially commenced collaboration".

118. *There is however also the overall complexity of the situation with the BSOs,* characterized by fragmentation of the sectoral associations (wine), sluggishness of the desire to change and lack of trust towards some of them (CCIs), the fact that many of the BSOs either suspended or drastically reduced their membership fees (UkrSadVinProm), etc.

119. *There are internal reasons too, however.* Capacity building of the sectoral associations is a complicated task and requires careful design and execution, starting from a thorough assessment of their baseline capacities, needs assessment and identification of the scope and details of targeted assistance that might well need to be tied to certain milestones to be met at certain stages of this journey (e.g. having a mission, vision and strategy, production of analytical materials for the members, providing information services for the members, etc.). As mentioned in the MTR of the 1st phase, this means having a separate staff person/retainer consultant, to handle these tasks. The project, as mentioned, had plans to engage international consultants with sector specific experience, including related to association- building, but these were affected first by COVID then war, except for the nuts sector. The question however is whether the team needs someone specifically in charge of that locally too.

120. *According to the ProDoc, it was foreseen that the project will sign corresponding MoUs/partnership agreements, with each partner outlining the specific commitments of each party as well as areas of cooperation within the framework of this project.* This was a practice in Phase I (only for the CCIs) but not in Phase II. While again, after the war, the situation might have made it difficult for the BSOs to make commitments, as a principle, this is a valid strategy and should be employed for all the BSOs that the project supports as well as possible the companies that benefit from comprehensive support. This is recommended in case the project is continued as Phase III (there is funding for it).

A) Sectoral associations

Nuts

121. *The most progress was achieved by the project in the case of the UNA.*⁵⁴ Under the guidance of the ITC, (with more than 15 meetings) UNA management developed the Vision, service portfolio, Action plan for UNA 2024-2030 and grant proposals. The Action plan focused on strengthening technical competence in the area market knowledge., increasing in attractiveness to members by building a market information system, expanding its international network, professionalizing communication strategy and capacity It was work together with the managerial staff focused on the role of the organization, its members, how it can be built. It should help to develop strategic approach as well as a mindset shift. The portfolio of services, which they can provide for their members and other non-members for free and on a paid basis was prepared and the system of payments to become financially sustainable by 2030 was elaborated.: this was under discussion with the members at the time of writing this report.

122. *The services in areas where ITC trained their specialists – service in the agronomy, service in the searching equipment for processing (the lists of producers were prepared by ICs), the service in market information – are the essential parts of the service portfolio UNA plans to provide for the members* (and already does to some extent). It is expected that providing services will help UNA become sustainable and help to involve more members in the next 3-5 years. Also under the guidance International Consultant Mr. James Fitzpatrick, UNA prepared a grant project concept to start seeking the donor's support to organize the processing hub for small hazelnut growers to provide services of initial post-harvest operations (like washing,

⁵⁴ <https://www.ukr-nuts.com.ua/en/association>

drying, sorting, cracking and packing). The document is expected to be finalized by spring 2024, so UNA can start contacting donors (USAID, GIZ, EU delegation).

123. *The UNA is an example of successful change. Its technical approach, awareness and strategy has modified.*⁵⁵

- *The organization has broadened its membership base, sought engagement with processors, redeveloped its promotional material, trained commercial growers through ITC interventions and been linked to international organizations such as the Oregon Hazelnut Marketing Board. It has reviewed in workshops with ITC its governance, marketing, advocacy role and long- term development strategy. This project is ongoing and of critical importance. The efforts by the IC engaged by the project to train the companies in the nuts sector and also to strengthen the UNA were highly appreciated by the interviewees for this MTE.*
- *The companies and UNA display a continued strong interest in export development and support as a result of building of technical capacity in marketing and presentation, a greater understanding of buyers' requirements, improved communication skills including trade show participation and presentation, using a hybrid model combining in-depth diagnosis of the sector and individual businesses, delivery of market information, preparation of a sector roadmap, business coaching, group workshops, export planning, linkage to buyers, training in technical skills e.g., managing orchards, website content. There has been a significant impact on awareness knowledge and understanding of the market and customers among the beneficiaries and the sector as a whole. The sector now has examples of outward looking businesses that are developing and have success stories to tell: (a) exporters appreciate that their natural market is the EU for reasons of demand, logistical advantage and sustainability; (b) a different type of buyer profile has been targeted by Ukrainian exporters as they understand that the problem of low prices in the years up to 2019 is related to marketing skills, customer selection, long term planning and food safety; (c) a better understanding of the market and knowledge of trends and buyers' requirements has improved the presentation and profile of exporters, and appreciation that Ukrainian walnuts have specific characteristics that are not "inferior" but better suited for ingredients processing markets making it possible to target the right customer type; and (d) the structure of the traditional Ukrainian walnut value chain with its dependence on micro growers and gathered harvests has been understood and re-presented as a potential opportunity to establish a sustainable supply chain.*
- *The Ukrainian edible nut sector continues to operate despite the war. It is undergoing significant change in its strategic approach- a difficult process especially in times of crisis. In the Ukrainian edible nuts sector, a willingness to develop is now clear based on the improved understanding, awareness and experience of recent years. There are some significant hurdles ahead including building on the improved business in Western Europe, recovering from the war, competing with Chinese exports as production increases there, modernizing the internal supply chain by*

⁵⁵ Source: IC Impact of the ITC Ukraine project on the edible nuts sector and beneficiary companies 2019-2022. Prepared by Jim Fitzpatrick 5th December 2022

traceability/certification and digitalization. The sector continues to need support in its development. This is best done by continued support of high potential enterprises and the trade association.

124. The areas of work where the UHA focuses its efforts at the time of writing this report were presented under Output 1 (on Roadmaps)

Vine and Wine

125. *The project has worked with several Vine and Wine associations.* They vary in their profile, capacity and type of activities. There was a certain level of success so far in capacity building of the Association of Black Sea Wine Crafts Producers⁵⁶; Association of Craft Winemakers of Ukraine⁵⁷; Roads of Wine and Taste of the Kherson Region; and the Association of Gardeners, Grape Growers and Winemakers of Ukraine (UKRSADVINPROM).⁵⁸

126. *The Association of Black Sea Wine Crafts Producers is one of the founders of the Association of Craft Winemakers of Ukraine. Both are rather active, especially the Association of Craft Winemakers of Ukraine and provide valuable services for members, including with guidance on production, sales and marketing.* Both have collected and archived the training materials from the series of trainings and workshops to distribute among their members.

- The Associations of Craft Winemakers of Ukraine (see **Box 7**) cooperates actively with USAID CEP and GIZ (see Section 3.4 on Synergies): with USAID CEP on trade fair participation (ProWein 2023 and 2024) and with GIZ on training. As mentioned earlier, this Association also very actively worked together with the MAPFU on legislative changes in the sector. The Association promotes "Wines of Ukraine" brand;
- The Association of Craft Winemakers of the Black Sea Coast is mostly focusing on promoting exports for its members. Also, it established the contacts with Association •VIGNERONS INDÉPENDANTS DE FRANCE. They have agreed to look for opportunities to invite Ukrainian winemakers to practice in the vineyards in France;
- UkrSadVinProm is one of the national level associations (the other one being UkrVinProm⁵⁹) involved in various joint project with OIV and closely engaging with the MAPFU on the reform issues.⁶⁰ Still, it is less active in terms of service provision to its members and will need more structured and close assistance package and time to evolve into a professional association; and.
- As for the Roads of Wine and Taste of the Kherson Region, this is still in the nascent stage, with the aim being focusing on wine tourism

127. *The representatives of the partner associations had an opportunity to get acquainted with the structures and functions of the national offices in Moldova, Georgia, Armenia, Australia, Austria, USA (California) and establish direct links with their management.* Establishment of a

⁵⁶<http://craftwine.com.ua/asocacya-en/>

⁵⁷<https://www.facebook.com/profile.php?id=100075558894067>

⁵⁸<https://www.ukrsadvinprom.com/en/>

⁵⁹<https://ukrvinprom.com.ua/en>

⁶⁰ UKRSADVINPROM and UKRVINPROM are competing in their efforts to be the "national" association (which inter alia will represent the Ukraine in OIV). The project works with UKRSADVINPROM only from these two, which, apart from wine and vine, includes also companies in the fruits and berries sectors.

similar office is recommended in the Roadmap supported by the Project, but the government does not seem to have a final position on this, and UKRADVONPROM sees itself as assuming that role.

Box 7 Beykush wines and the Association of Craft Winemakers of Ukraine. Indirect synergies with GIZ and USAID CEP

Beikush Wines (<https://beykush.com/>) started in 2018. Got licensed just before the licensing got easier. The company started exporting to Poland, without any outside help in 2021. Also, in 2021 the company initiated the Association of Craft Winemakers of Ukraine. The Association of Black Sea Wine Crafts Producers is one of the founding members of this Association. Beikush now exports to many countries- including Japan, UK, Estonia, Sweden, Iceland, USA etc. As an Association there will be more opportunities they believe, as then the necessary quantities could be secured. Since 2022, the Association presents the brand "Wines of Ukraine"



The Association appreciates highly the work that ITC project has done with the Roadmap, training and Study Tours. They consider it to be very important to push for the implementation of the measures identified in the Roadmap, including support with the Registry and establishment of the National Office. The state is hesitant with the latter, as it requires allocating funding and staff. The Association got support from USAID CEP (visited ProWein) and GIZ (that supported 4 seminars in 2023, on licensing, marketing, export). The Association cooperates with UKRSADVINPROM, EEPO and the All- Ukrainian CCI (they used CCI premises for the trainings, they participate in the study tours organized by the CCI (e.g. Moldova)) Wines of Ukraine presented 13 wineries to UK trade on the 9th of October in London and plans to participate at the London Wine Fair, building on its successes from the previous year's participation in these prominent international fairs. The Association needs further support, e.g. with better website, etc. They are now working with GIZ to design such package of support



F&V sector

128. *In F&V sector, the project supports the (a) Ukrainian Agricultural Export Association⁶¹ which focuses on processed F&V, and (b) UKRSADVINPROM. Both have benefited from the training (e.g. on ITC tools), but have some way to go towards becoming professional associations working sustainably, for a variety of reasons, both internal and external.* The war impacted their work not only in terms of value chains and some members quitting the market, but also for some members unable/unwilling to pay membership fees in the post-war environment, and so those are symbolic mostly, which then affects their ability to hire and maintain staff and establish a solid sustainable portfolio of the training and advisory services.

129. *The project has cooperated also with U-Food⁶², an association active in the export of processed food, but mostly in Phase I.* in the context of the development of the Roadmap for the Nuts sector (also at SIAL 2018, Agritrade Ukraine⁶³ (a project by the German Ministry of Agriculture) organized the conference for Ukrainian companies, and the ITC project and U-food were co-partners).

130. *The project had cooperated also with UkrSadProm⁶⁴, but after the change in management, the latter is much less active.*

⁶¹ <https://uaexport.org>

⁶² <https://u-food.org/en>

⁶³ <https://gopa-afc.de/fr/news/new-phase-agritrade-project-ukraine>

⁶⁴ <https://ukrsadprom.org/eng/pro-nas/>

131. *The project is in contact with the Public Union "Organic Ukraine and plans training for wine and vine sector in 2024 in organic viticulture"*⁶⁵. As mentioned earlier, it was expected that the project will include awareness-raising workshops dedicated to among other, also to organic agriculture; and that producers would be linked to relevant projects/expertise assisting them in meeting environmental standards. However, since SECO has a project (Quality Food Trade program (QFP)) dealing with organic agriculture⁶⁶ the ITC Phase II project has less scope of activities in this regard. There are other projects supporting organic agriculture and agribusiness (including with export promotion, e.g. the German-Ukrainian Cooperation in Organic Farming (COA)⁶⁷, funded by the German Federal Ministry for Food and Agriculture (BMEL), the *Western NIS Enterprise Fund* (WNISEF), funded by the U.S. government via USAID and IPD (Germany). Often the participation of Ukrainian companies at BioFach Trade affairs is funded by many agencies (each funding several companies). Biofach 2024, included also participation of many policymakers from Ukraine. While the ITC Phase II project did not support participation in BioFach 2024⁶⁸, it did support 4 companies' participation in the organic Section of ANUGA 2023 (see Section 3.4 on Efficiency under the Subsection on Synergies). Another reason for the ITC Phae II project not being too involved in the organic field is that since 2023, the Ukrainian organic legislation has been fully implemented with the support of international projects focused on technical assistance to Ukraine: important milestones were reached: the accreditation of Ukraine's first organic certification body and the publication of two state registers of organic certification bodies and organic operators. Organic products labelled with Ukraine's organic logo are already available in Ukraine. More than 160 organic operators are already certified according to the Ukrainian Organic Law. The alignment of Ukrainian law to the EU regulation is the main objective for 2024.⁶⁹

132. In 2024, the project does however plan training for vine and wine sector, as this is no covered under the SECO project.

133. *There are other associations too, with which the project does not engage:* these could have been used at least as conduits for awareness raising and channels for spreading the recordings of webinars. For example, this applies to: Ukrainian Business and Trade Association⁷⁰; Ukrainian Horticultural Association⁷¹, Association "Ukrainian Agribusiness Club" (UCAB)⁷²; Ukrainian

Photo 6: Gulfood 2024, Dubai



Source: 2023 Annual report of the project

⁶⁵ <https://organicukraine.org.ua/en>

⁶⁶ <https://qftp.org/en/>

⁶⁷ <http://www.coa-ukraine.com/en/>

⁶⁸ <https://gopa-afc.de/news/joint-international-support-ukraines-presence-biofach-2024>

⁶⁹ *ibid*

⁷⁰ <https://ubta.com.ua/>

⁷¹ <https://fruit-ukraine.org/eng/>

⁷² https://ucab.ua/en/pro_ukab

League of Industrialists and Entrepreneurs (ULIE)⁷³.

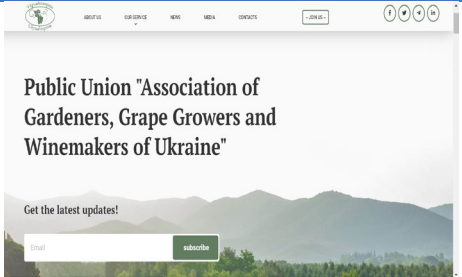
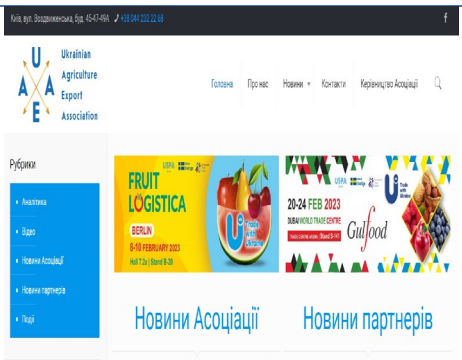
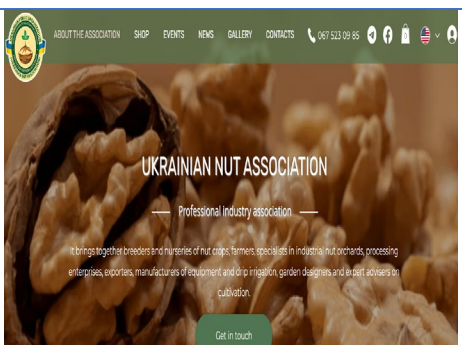


⁷³ <https://uspp.ua/en/about-ulie>

134. *There is a gap related to Vegetables sector.* Not only the companies that specialized in vegetables were from the now - occupied territory in their vast majority, but also, none of the Associations cited above deals with that subsector

135. *To ensure sustainability, the project was expected to anchor knowledge sharing platforms within partner BSOs.* This is a rather vague formulation; according to the project management this is understood not in terms of new e-platforms designed but rather experience sharing with Peer-to-Peer (P2P) experience sharing. That makes it very important then that (a) the project's website itself features lessons learned, as well as resources (e.g., links to development initiatives that the SMEs could additionally apply to) and service companies (e.g. those in logistics, certification); and (b) the project partner BSOs are linked to.

136. *The review of the websites of the partner BSOs (see Table 8) revealed that only a couple of them had a professional website,* which would feature the range of the services that is expected from them, mission and vision, resource materials for their members (including ITC tools), as well as acknowledgements of the project (see discussion on visibility under Section 3.4 on Efficiency).

Table 8 Snapshots of websites of partner BSOs

Snapshots of the websites	Notes
	<p>UkrSadVinProm: No mention of the project and facilitation of exports, including with trade fair participation No links to the project website, and announcements No mention about analytical services Outdated articles from 2018 the latest</p>
	<p>Ukrainian Agricultural Export Association <i>Website only in Ukrainian</i> No mention of the project No links to the project website, and announcements No information on the services provided by the association</p>
	<p>Ukrainian Nuts Association (UNA) No mention of the project No links to the project website, and announcements No information on the services provided by the association The Action Plan developed with the support of the project not on the website</p>
	<p>Association of Black Sea Wine Crafts Producers There is only one page on the website of the SILVINO company (as on the left) with no further information</p>
	<p>Association of Craft Winemakers of Ukraine Only a Facebook page in Ukrainian only, but with active No mention of the project</p>

137. *Towards the end of the project the BSOs were to be entrusted with leadership of event organization such as trade fair participation and matchmaking events. It can be said that this happened to a very limited degree only so far:* After successful joint organization of first events, the project was to take a step back and act in the background supporting the BSOs in case assistance was required. Thus, BSOs were to learn- by- doing, while receiving full visibility of the action. UkrSadVinProm services in organizing study tours were improved through their involvement in project activities and receipt of continuous guidance and backstopping. The project used to invite the representatives of the partner associations to the trade fairs but had stopped at the time of writing this report. While the trade-fairs have UkrSadVinProm and the Ukrainian Agricultural Export Association, as well as UNA as a partner association, their role in organizing the trade fairs was marginal. Thus, the project is far from reaching that objective, mostly for external reasons, due to war and the related issues with the finances of the BSOs, as well the overall weaknesses of these BSOs, but also for the reason that the overall work dynamics with these BSOs has not as yet reached the stage when this role could be transferred to them, as was perceived by the project (and this MTE concurs).

138. *BSOs were to be backstopped in their fund-raising efforts throughout the project's lifecycle, in particular by training and helping them to develop fund-raising strategies. At the request of two associations, the project assists in developing two concepts.* One concept, initiated by the 'Roads of Wine and Taste of Kherson Region' NGO, aims to revive the grape-growing and winemaking sector in the Kherson region on de-occupied territories. Its objectives include job creation, implementing sustainable development requirements in conditions of water scarcity for irrigation following the rupture of the Kakhovka dam, and fostering rural area development. The second concept, developed in collaboration with the Ukrainian Nut Association, aims to establish a production hub for processing hazelnuts by micro- and small-scale farmers to enhance quality and achieve higher prices. Additionally, the goal of this micro-project is to create additional job opportunities and enhance the competitiveness of Ukrainian enterprises. These associations will further use these concepts to secure grants and seek international technical support.

B) CCIs

139. *Before the war, the project worked with several regional CCIs, namely, Dnipropetrovsk CCI, Odessa CCI, Kherson CCI, and Zaporizhzhya CCI.* After the war started, this direction of work stopped with most of them. With the latter two, the work stopped as their companies mostly either relocated or stayed in the occupied territory. The work with the Odessa CCI stopped because there were internal issues within the CCI. So, this essentially leaves the Dnipro CCI: the interviewed Dnipro CCI representative reflected that their work benefitted from the training provided by the project, especially related to the use of the ITC tools.

140. *The project had some engagement with the All-Ukrainian CCI in the context of developing the Roadmap of Wine and Vine only in Phase II* (there was training on ITC tools, in Phase I)

D) State Institutions

141. *The project cooperated with the EEPO, but the latter mostly deals with processed food (not nuts or wine, or fresh F&V).* EEPO also supports trade fair participation if it succeeds finding funding for it (they also receive some state financial support); and there has been reasonable coordination with the Project. EEPO staff has joined in project-supported webinars and have benefitted from those.

142. *Before the war, the project cooperated also with the commercial departments of the regional administrations, but this has stopped since the war started.* The one in Kherson is a good example. The Regional administrations with their mandate have the following related functions: (a) Organizations of exhibitions (with the help of Kherson Regional Administration, ITC Phase II project, under Phase I and the beginning of Phase II had a chance to meet companies, especially the new ones, that they did not know about before); (b) grant programs, e.g., for equipment; and (c) facilitation in the trade fairs (Kherson Regional Administration, produced industrial passports for the companies as their contribution to the project-provided support). Since the eruption of the war, the regional administrations are preoccupied with the consequences of the war. In 2024, the project is planning however to provide training for the Odessa regional development agency, based on their request

143. *As could be seen from Table 9, the project is far behind the targets for Output 3. As discussed, this is mostly for the external reasons*

Table 9: Achievement of Output 3 targets, self report

Indicator	Target	Total 05/2021-12/2023	Notes
Number of training courses, seminars and workshops conducted	6	2	<ul style="list-style-type: none"> • Training in Vision and Action Plan preparation to achieve the vision for the organisation; • Workshops in pruning
Number of BSOs trained (aggregated)	10	1	Ukrainian Nut Association (UNA)
Number of workshop participants	70	7	-----
Number of women participants of the workshops	25	1	-----
Number of new/improved services provided by BSOs	6	1	Advisory services in pruning, assessment of an orchard condition and provision of recommendation on how to improve

OUTPUT 4. MARKET LINKAGES CREATED FOR SMES FROM F&V AND NUTS SECTORS TO EXPAND THEIR SALES DOMESTICALLY AND INTERNATIONALLY (IN PARTICULAR, WITH A FOCUS ON THE EU MARKET).

144. *Since the major focus of the project is on assisting the companies to establish market linkages leading to tangible results in exports, there was a significant emphasis in the project on this Output, assisting beneficiary MSMEs from the F&V and nuts sectors in getting connected to target export markets and linked with buyers, to promote their solid presence in the foreign markets, internationalization, and sustainable business generation.* During the period under evaluation the project supported participation in 11 trade-fairs:

- ANUGA (2021, 2023);
- FRUITLOGISTICA, (2022, 2023);
- Gulfood (2021, 2022, 2023);
- SIAL (2022); and
- Fruit Attraction (2021, 2022, 2023)

Photo 7 FRUITLOGISTICA 2024, Berlin



Photo 8: ANUGA 2023



Photo 9: Fruit Attraction 2022



Photo 10: SIAL 2022



Source: Project Annual Report 2023

145. *For the new product group- nuts- the project initially focused on identifying target markets and preparing beneficiary SMEs for the interaction with buyers and for participation in matching activities, i.e., trade fairs, meetings with buyers, etc., with the expectation that SMEs will be ready for matching events and for successful participation in trade fairs; and will establish new contacts with potential for business transactions.* The project organized guided study visits to trade fairs to help companies better understand market requirements, competition and competitor behavior and market trends. For example, the project organized a guided tour at Anuga 2021 for 3 producers and processors of walnuts and hazelnuts to gain better understanding of market requirements, competition, etc. Overall, this improved awareness and knowledge of the market needs of private businesses.

146. *All targets for this Output were met (see Table 10), with the caveat that the for the Indicator “number of companies participating in trade fairs/buyer-seller meetings the project had set the target and then reported in the Annual report not in terms of unique companies but in the “aggregated” way.*

Table 10 Achievement of Output 4 targets, self report

Indicator	Target*	Total cumulative to date (revised for May 21 – Dec 23)	Total cumulative to date (on the annual basis) *
Number of trade fairs/buyer-seller meetings that beneficiary companies have attended.	7	13	13
Number of companies participating in trade fairs/buyer-seller meetings.	70*	43 (unique)	98 (aggregated)
Number of participating companies in the trade fairs/buyer-seller meetings that are women owned/operated /controlled or with majority women employed.	10*	12 (unique)	12 (unique)

* the targets were set having "aggregated" figures in mind, i.e. if a certain company participated in 3 training events, it counts as 3

147. *There are several other development projects/initiatives that support participation of Ukrainian companies, including in the same sectors, in the trade fairs.* These are supported both by (a) international development partners (e.g. USAID CEP, in which case the costs of the booths are covered for the donors) and (b) local initiatives, like by the All-Ukrainian CCI and Export Promotion Center, in which case the companies share the costs of the booths. The latter two are used mostly by the larger companies

148. *The project does not restrict participation in trade fairs to those who have received comprehensive support, especially since the project's coverage has expanded to include the entire country. What is considered important, is that a company is committed, export-ready, and willing to contribute the costs of hotels and airfare.* For example, Ukr-Walnut initially engaged with the project during Phase I. They participated in several awareness and capacity-building events and trade fairs but later ceased their interaction with the project for internal reasons. Since no advisory services were provided, Ukr-Walnut was not classified as having received comprehensive project support. However, they recently reestablished cooperation with the project, as they assessed being export-ready and having confirmed their commitment to collaborate. Additionally, three new companies from the Dnipropetrovsk region, Agronika, Armoprom-D, and Oril-Eco approached the project in mid-2023. Prior to the Russian invasion, they primarily focused on the domestic market. Nizhyn Agro-Agroinvest joined the project during Phase II, as the project had not previously worked with the Chernihiv region.

Box 8 the main principles of selection for trade fair participation

- Priority is given to companies that have been part of the project on a long-term basis.
- Second priority is granted, if any space remains available, to those who have been part of assistance programs within other project frameworks or to new entities that express interest, commitment, and meet our criteria.
- The project also considers inviting less developed or prepared entities as visitors for the study tour, with costs shared.

149. *The extent of coverage of the costs for all the companies-exhibitors is the same for all, but the details changed over time.* Before the war the project covered the following costs: the space rent at the trade fair and the stand construction. The companies covered fully their travel, accommodation, printing the marketing materials (brochures, flyers, catalogues etc.), some of them prepared the video for the trade fair, in a few cases they purchased the entry tickets for the trade fairs. Since the war started the project covers the space rent at the trade fair, the stand construction, plus accommodation (hotel) for 1 representative per company in twin room.

150. *The project might also consider having a rating system to select the participants to receive financial support for trade fair participation, that would, for example, if faced with choice favor the companies that are only at the beginning of the export journey rather than the companies that have been with project-supported trade fairs or more than 3 years.* While it is justified to continue supporting the existing beneficiaries, with the costs of trade fair participation for 3+ years, there are companies that have benefitted from such support from the start of Phase 1, i.e. around 7 years, e.g. FRUITLIFE (AlmaFruit TM); Sadyi Dnepra; USPA Fruit. The project has considered introducing variable levels of contribution towards the costs of trade fair participation, but based on the interviews this is complicated technically since might necessitate companies paying the ITC itself, which is complicated. It does however seem to be problem that could be resolved.

151. *In the beginning of Phase II, the project invited international consultants to facilitate B2B events at the trade fairs, but then stopped, as this was assessed to be too expensive: this is in demand however.* The companies in the interviews for this MTE expressed the desire for such assistance, and perhaps the ones that are only starting their exporting journey need such support most.

Quote 8: Trade fair participation

...Our approach to marketing planning has evolved, transforming participation in trade fairs from casual excursions to well-planned endeavours scheduled a year in advance. SME

Online Survey

...the first time visiting a trade fair was an eye opener, we did not even know that we can export without going via distributors...

SME

KIIs

152. *The interviewed MSME representatives highly appreciated the benefits of participating in trade fairs, mentioning gaining contacts, learning how to improve their marketing and pitching strategies and materials, learning from other participants from all over the world, and even from their peers from Ukraine and establishing cooperative agreements with the latter.* The ones participating in Dubai Gulfood, mentioned that they managed to get buyers not only from the Gulf countries, but also from North Africa and Asia.

153. *Several KIIs also expressed a desire for the project to support trade missions- for targeted products and if there is support by knowledgeable international consultants.* For the nuts sector this could be the case (to the UK and Germany) and was planned but did not materialize.

3.3.2. ACHIEVEMENT OF OUTCOMES

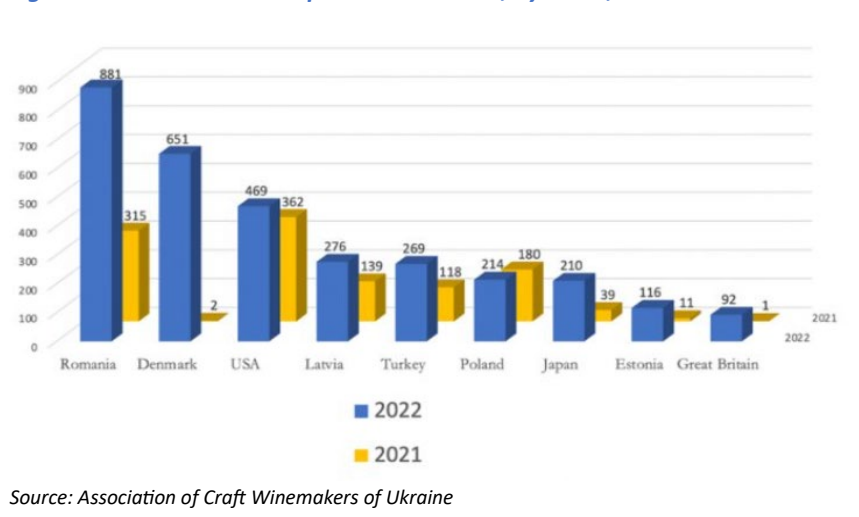
154. *The project is falling short of achieving most of its targets for outcomes, but given the context, the achievements are significant* (see **Table 11**). In particular, 46 unique SMEs, 12 of which women-owned, reported improved international competitiveness, and 12 unique SMEs (3 of which women -owned) reported having transacted international business.

155. *Thus, the project has significantly contributed to improved competitiveness and internationalization of SMEs and has to some extent enhanced the performance of BSOs' to provide relevant services to enterprises.* Of special importance is the project's contribution to promoting stronger competitive ties with the EU. Now that Ukraine is an EU membership Candidate country, the prospects of the removal of customs checks to trade with the EU is

closer and more realistic for more companies, and hence there would/could be more companies that would want to export to the EU countries, and those who already do, are likely might focus on that more.

156. *Already during the time leading to 2022, there were increased exports to the EU countries for wine and Nuts sectors.* As discussed earlier, the project does not collect export data from the companies and at the end of the project will be using data from the State Statistics service to assess the contribution of the project⁷⁴. For *wine* sector (see **Figure 15**, noting that increased exports of wines was not among the objectives of this project)) and nuts sectors, data were available from the sectoral associations, and they show that already during the time leading to 2022, there were increased exports to the EU countries.

Figure 15: Ukraine Wine Exports 2022 Vs 2021, by value, 10K USD



For *wine* sector (see **Figure 15**, noting that increased exports of wines was not among the objectives of this project)) and nuts sectors, data were available from the sectoral associations, and they show that already during the time leading to 2022, there were increased exports to the EU countries.

157. *In 2022, nut exports amounted to US\$80.3 million, with the majority directed to the EU, Asian countries, and Southeast Asia.* The annual nuts export from Ukraine constitutes a substantial portion of the country's external trade structure, ranging from 25 percent to 30 percent. UNA was actively working on market development, planning to expand the range of exported goods, particularly in nut processing products. This strategy aims to secure a stable position in the global nut market amidst increasing competition and changing consumer demands⁷⁵. In 2023, In terms of volume, there was export growth for walnuts by 21 percent (31 thousand tons), although there was a decline in terms of revenues, due to falling prices⁷⁶

158. *In terms of volume, there was also growth in the export of frozen fruits* by 3 percent (87 thousand tons).⁷⁷

159. *The wine and nuts sectors improved outcomes in terms of the production volume/patterns too:*

- **Wine:** Overall, Ukraine has retained around 100 wineries (down from 180 before the war started), with the majority remaining operational,⁷⁸ which is remarkable given the ordeal that many went through with the war. Six wine regions have been officially approved in

⁷⁴ The indicators are (a) Increased exports of SMEs from selected sectors; (b) Increased exports of SMEs from selected sectors to the EU; (c) Increased share of SMEs in the economy of Ukraine

⁷⁵ source: agro-business.com.ua

⁷⁶ <https://www.freshplaza.com/europe/article/9594523/the-eu-makes-up-around-80-of-ukraine-s-horticultural-exports/>

⁷⁷ <https://www.freshplaza.com/europe/article/9594523/the-eu-makes-up-around-80-of-ukraine-s-horticultural-exports/>

⁷⁸ <https://www.decanter.com/wine-news/ukraine-wine-harvest-2023-sipping-resilience-512303/>

Ukraine. A large number of new wineries that have appeared in the last 5 years are located in cool climates (see [Figure 16](#));⁷⁹

- **Nuts:** For the sixth year in a row (see [Figure 17](#)), the share of newly created industrial nut orchards is the largest in Ukraine making up almost half of the area of all orchards in the country planted with the help of state support programs (2018-2023: 5,602 hectares of nut orchards, or 41 percent of the total area of all newly established orchards in the country, established with

Figure 16: Winemaking regions

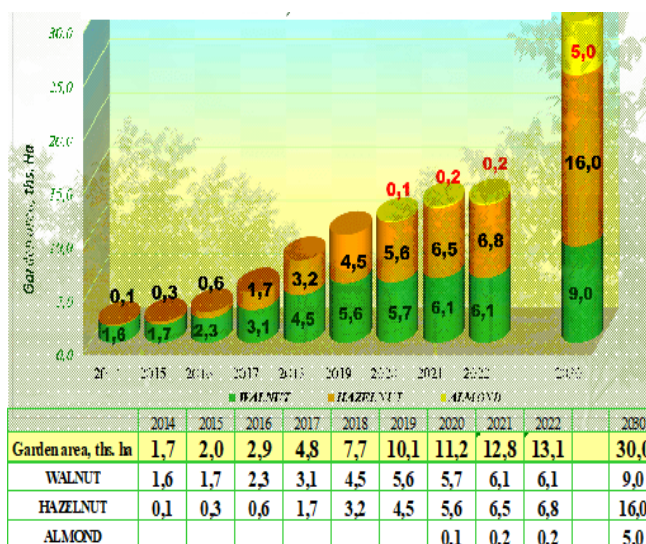


Credit: Wines of Ukraine

the help of government support programs).⁸⁰ The area of industrial nut orchards in the country was 13.1 thousand hectares by 2022, with significant growth, especially in regions such as Kyiv, Zakarpattia, and Cherkasy. The UNA expects that by 2030 the area planted with nuts will increase from 13 100 ha in 2022 to 30 000 ha: 9 000 ha of walnut plantations, 16 000 ha of hazelnuts and 5 000 ha of almonds.

160. As for the F&V, the global trend of decreasing prices affected Ukrainian production, resulting in a drop in walnut and frozen fruit prices, and export revenues, but in terms of export volumes, there was an increase for frozen fruits and berries. The EU remained a critically important market, accounting for approximately 80 percent of Ukraine's horticultural product purchases. In 2023, Ukraine experienced an 18 percent decrease in revenue from the export of fruits, berries, and nuts, amounting to US\$257 million. The export structure highlighted a predominant decline in frozen berries and fruits at US\$132 million (-31 percent). An increase in berry exports reached US\$18 million (+31 percent). In

Figure 17: Growth of areas of with industrial walnut orchards (thousand Ha)



Source: <https://www.ukr-nuts.com.ua/en>

⁷⁹ <https://www.decanter.com/wine-news/ukraine-wine-harvest-2023-sipping-resilience-512303/>

⁸⁰ <https://www.ukr-nuts.com.ua/en>

terms of volume, there was growth in the export of frozen fruits by 3 percent (87 thousand tons), and berry crops by 19 percent (5 thousand tons). However, apple and pear exports saw a reduction of 10 percent (42 thousand tons) in overseas sales.⁸¹

161. *The results were distributed across different groups of companies*, The benefits of the project accrued to: (a) companies of different size and age⁸²; (b) companies with the history of exports without any assistance from development partners before joining the project and those that concluded their first export contracts thanks to the project and their first ever participation at the trade fairs, etc. This is in line with the UN leave no-one behind policy.

162. *The project could do more however, in reaching out and attracting more of other export-oriented companies in these sectors that are export ready and only starting exporting*. This would be justified, since while the project has opened up to the whole of Ukraine after war, this has been limited. This would also be in line with the project to the Strategy for Sweden's reform cooperation with Eastern Europe for 2021-2027, in particular elements related to inclusive economic development and supporting, resilience, including the ability of newly exporting MSMEs to maintain/grow their exports. Plus, part of the companies that are engaged with the project, have been with it for 3 -7 years. For many of those, the learning from the project has now diminished. For that it needs to improve its public awareness activities (see Section 3.4 on Efficiency). This will increase the number of the interested companies, including as applicants for the participation in trade fairs and the project will need more resources (extra staff) to handle it.

163. *The overall increase of the cost of trade fair participation up to 30 percent resulted that some trade fairs are under question*. In the last year of the project (which includes 8 months of no-cost extension), the most essential trade fairs (Fruit Logistica, Gulfood, SIAL) will be conducted while other on-site events (Fruit Attraction, mission to Sweden) are subject of available budget. These higher costs will need to be taken into account in the case of potential 3rd Phase of the project, implying (a) stricter prioritization; (b) more cost sharing with development partners and (c) more contribution by the participants.

164. *The project continuously analyzed, access to finance (A2F) and other bottlenecks for partner MSMEs to build or sustain exports*. The issues with company A2F were cited in the interviews for this MTE often by the company representatives as one of the main obstacles for them to expand their production and exports. They mentioned expensive loans with too high interest rates and also the risks associated with such borrowing in the context of the war. Not all companies however needed loans, as they had investors backing them. As for the state programs of support with A2F the affordable loans for SMEs with 5-7-9 percent loans program is one of the two, whereby SME can take a loan in a bank with the current interest rate (26 percent at the time of writing this report). but it pays 5 or 7 or 9 percent depending on their category. The rest is covered by the state, Unfortunately, because of problems with the state at the time of writing this report, there was information from the companies that they have to pay the whole interest rate, as according to the loan agreement if the government does not cover own part for 3 months, then the bank asks the SME to compensate the part not paid by the program. There is also the state grant program, administered by the MEDTU, but it has

⁸¹ <https://www.freshplaza.com/europe/article/9594523/the-eu-makes-up-around-80-of-ukraine-s-horticultural-exports/>

⁸² The baseline survey of 2020 demonstrated that producers had on average 47 permanent employees, of which women amount to approximately 47%. These companies hired on average 66 additional employees for seasonal work, of which 55% are women.

many conditions attached to it, for example the number of employed, which is too high for the companies with small staff that goes high only seasonally.

Table 11 Achievement of Outcome targets, self-report

Outcome Indicators	Targets	Cumulative 2021-2023, Unique	Progress as in the Annual Report 2023	Progress as reported	Comment
Number of SMEs reporting improved international competitiveness (including women-owned/ operated/ controlled or with a majority of women employed).	50 (15)	46 (33 MSMEs for F&V, nut sectors and 13 for wine sector) 12 women owned/ managed (9 unique for MSMEs for F&V, nut sectors and 3 for wine sector)	directly assisted SMEs ⁸³ : in 2023: 20 (3) total 45 (9)	<p>2021 Thirteen (13) producers reported improvements in international competitiveness in the following areas: good agricultural practices, hazelnut cultivation technique and capacities to participate in the trade fairs and negotiating with international buyers. To achieve this, the project assisted producers in improving understanding of market requirements, quality standards and their practical implications; knowledge in agronomy (hazelnut producers).</p> <p>2022 Twelve (12) producers reported improvements in international competitiveness in the following areas: good agricultural practices, hazelnut cultivation techniques and capacity to participate in trade fairs and negotiate with international buyers. The project assisted producers in improving their understanding of market requirements, quality standards and their practical implications, knowledge of specific techniques pruning (hazelnut producers), and export planning. Four (4) nut exporters started to develop individual Export Marketing plans, which will act as a tool, giving structure to the new export activities and define a step-by-step approach. Thus, 253 companies (476 participants) participated in 23 trainings/workshops and awareness-building events organized by the project in 2022.</p> <p>2023</p> <ul style="list-style-type: none"> • Four (4) hazelnut growers started to implement the best post-harvest (processing) practices and purchased additional equipment for storage, drying, cracking the hazelnuts. It is the result of the study visit to Georgia • Ten (10) wine producers reported improvements in the following areas: quality of wine production, implementations of sustainable practices in the vineyards, good practices how to improve the conditions for tourists' entertainment. Three (3) wine producers changed the wine labels according the EU requirements as a result of projects recommendations. • Three (3) nut exporters benefited from developing Export Market Plans and confirms, that such exercise helped them to focus on identified markets with more efforts. • The project continued to involve a wider group of companies in its activities:856 companies-aggregated (1449 participants) participated in 42 trainings/workshops and awareness-building events organized by the project in 2023. 	While the self-reported figures cannot be independently verified, the interviews conducted in the context MTE corroborate this assessment

⁸³ These figures are from the formally submitted Annual Report 2023, but the evaluator was told that there was a mistake in calculating these numbers

Outcome Indicators	Targets	Cumulative 2021-2023, Unique	Progress as in the Annual Report 2023	Progress as reported	Comment
<i>Number of SMEs that have transacted international business</i>	21 (7)	12 (including 3 women owned/managed)	2023 4 (1) Total 13 (2) ⁸⁴	<p>2021 Seven (7) producers concluded export contracts and/or increased order values under existing contracts. In particular, as a result of participation in various market linkages events organized by the project: – One beneficiary company Ukr-Walnut Ltd. exported three pallets of blanched walnuts to Norway; – One beneficiary company Sadyi Dnepra LLC exported fresh apples to Cambodia and Somalia as a result of participation in the Gulfood trade fair (February 2021); 3 The indicators will be fine-tuned during the Project Steering Committee, planned for May-June 2022 4 – Two beneficiary companies signed preliminary agreements on export of their produce (frozen F&V) to Poland and Romania as a result of participation in the Anuga trade fair (October 2021).</p> <p>2022 Five (5) producers concluded export contracts and/or increased order values under existing contracts thanks to market linkages events organized by the project resulted in: – Agrotrade Lubny Ltd., exported their total stock of walnuts in April-May to the EU; – Vol Nut, exported its yield to Italy; – Sadyi Dnepra LLC, exported fresh apples to Kenya at first and found a new customer in Sweden as a result of participation in Fruit Attraction (October 2022); – USPA fruit, expanded their sales to Denmark; – Filbert, established new production facilities for confectionary (nuts in chocolate) as a result of trade fair visits and finding partners in Italy.</p> <p>2023 Five (5) producers concluded export contracts and/or increased order values under existing contracts. In particular, as a result of participation in various market linkages events organized by the project:</p> <ul style="list-style-type: none"> • One beneficiary company, Vol Nut, exported the yield to UAE as a result of GULFOOD participation; • One beneficiary company Ukr Walnut was able to re-establish Partnership with German importer as a result of ANUGA participation • One beneficiary company Agronica started to export to Latvia thanks to the Participation in ANUGA One beneficiary company, • USPA fruit expanded their sales to Spain; thanks to the participation in Fruit Attraction. • One beneficiary company Nutsee started to sell to UAE as a result of GULFOOD participation. 	While the self-reported figures cannot be independently verified, the interviews conducted in the context MTE corroborate this assessment
<i>Increase in export and domestic sales of selected (pilot) SMEs</i>	30%			To be reported by the end of the project.	

⁸⁴ ibid

Outcome Indicators	Targets	Cumulative 2021-2023, Unique	Progress as in the Annual Report 2023	Progress as reported	Comment
<i>as compared to the survey in 2020</i>					
<i>Number of new markets and by SMEs</i>	4	4	4	All destinations remain the same.	
<i>Number of BSOs that have improved services and/or operational performance</i>	6	4	4	BSOs' services ⁸⁵ in organizing study tours were improved through their involvement in project activities and receipt of continuous guidance and backstopping. UkrSadVinProm actively involved in various joint project with OIV (International Wine and Vine Association). The Association of craft winemakers of Black Sea coast and association of Craft winemakers created the online library and share among its members the webinars, conducted by the project within 2022-2023. Also, Ukrainian Association of Agrarian Export, Ukrainian Nut Association, UkrSadVinProm improved operational performance thanks to the trade fair visits, organized by the project, in the following areas: Networking Opportunities, Market Intelligence, Exposure to Innovation. Participation in trade fairs and training programs empowers BSOs to improve their services, expand their knowledge base, and strengthen their operational performance, ultimately enabling them to better serve the needs of their clients and contribute to economic growth and development.	While the self-reported figures cannot be independently verified, the interviews conducted in the context MTE corroborate this assessment
<i>Number of jobs created and/or retained in the project beneficiary comps</i>	10 % increase			The results of the survey will be by the end of end of the project.	
	10 % increase			The results of the survey will be by the end of end of the project.	

⁸⁵ BSO: UkrSadVinProm.

3.4. EFFICIENCY

Implementation mechanisms

165. *The project implementation mechanisms were, overall, appropriate to achieve planned outputs and contribute to project outcomes.* Trade missions/B2B received lesser attention than planned, to some extent conditioned by the war and the difficulties in organizing trips abroad: this could be rectified if the project receives funding for a third Phase. The project might have benefited from signing MoUs with the beneficiaries as was planned: this might have helped making more progress with the BSOs and obtaining export data from the companies.

Quality of management

166. *The project team has demonstrated strong adaptive management skills in the face of COVID 19 consequences and the war.* Shifting to effectively managed webinar format and managing to arrange face-to-face meetings with some of the international consultants at the trade fairs are the best examples for that.

167. *The project management has proved to be very efficient.* The smooth organization of the participation in Study Tours and Trade Fairs are the best examples of that. All the interviewees without exception had only highly positive feedback about the competencies of the team. Many commented however that the national team is short staffed and that they perhaps need an additional person to deal specifically with BSO capacity building, as well as a communications expert that would be engaged continuously (even if on a part-time basis).

Risk Management

168. *The project monitored the emergent and ever-evolving risks quite closely.* There is a continually updated risk log in the Annual report. The project is in close contact with the businesses and the government which allows to be in the loop. Opening up the project's geography to the entire country was one specific risk management actions.

Performance of the project's M&E System, reporting and Results Based Management (RBM)

169. *The project uses RBM to enhance its performance⁸⁶, but this could be further improved.* For example, while the project collected feedback after each webinar (in google forms) and these were reviewed, there was no summary statistics. The project interviewed participants of the trade fairs, but there was no requirement for those benefitting from financial support of ITC (in terms of trade fair participation) to disclose the volume of exports achieved. The project would have benefitted from a more systematic way of capturing outcomes and the changes at MSMEs and BSOs that the project has contributed to as a result of the training, direct assistance and study tours.

⁸⁶ Note that according to a 2018 evaluation of Sida's market systems development approach, Sida has mainstreamed an Inclusive Market Systems Development approach across its portfolio, encouraging all contributions to consider these aspects of sustainability. It emphasizes that as well as being a tool for accountability, RBM should be used to inform ongoing learning and adaptation (e.g. by applying the DCED Standard for Results Measurement). The DCED Standard is a framework that aids projects to clearly state the hypothesis and set indicators that are monitored regularly to demonstrate whether events are going according to plan

170. *The project's M&E system is performant, but there is room for improvement:*

- the results framework would have benefited from having midterm targets;
- the reporting format could have been much better, including reporting on cumulative basis, in addition to yearly results on annual basis;
- it would have been better to count number of unique persons trained rather than number of training event participants in aggregate, or in conjunction with that (the same for the number of companies): this is something to consider if there is Phase III; and
- The project could have done much better in capturing success stories and lessons learned, documenting and disseminating. At the time of writing this report, the website of the project has a page on "success stories" but the information there is outdated (2020) and whatever is there could hardly be called "success stories."

Oversight

171. *In-country stakeholders, including the private sector been involved in guiding project implementation through the participation in the PSC, in relation to decision-making, monitoring, and implementation.* Local ownership on the part of enterprises and BSOs was ensured also through cost-sharing. PSC had 15 members from: (a) Sida; (b) EEPO; (c) Viticulture and Winemaking Unit of the Agriculture and Crop Production Office of the Agrarian Development Department, MAPFU; (d) DCP/OEECA, ITC; (e) Fresh Fruits and Vegetables, DECI/SEC, ITC; (f) Ukrainian Berries Association (UBA); (g) UkrSadVinProm; (h) UNA; and (i) 7 MSMEs. However, there are no designated persons from these entities, which is not a best practice as it hinders continuity in the follow up of the discussed issues.

172. *ITC and the donor conducted informal annual review meetings back-to-back with PSC, when possible, to review the annual progress of the project implementation (based on the submitted annual progress report), to discuss the results of the PSC and agree on the next steps.*

173. *Due to the war, the Project Coordinator could not visit Ukraine since the start of the war. He could however meet some of the company and BSO representatives during trade fairs.*

Delivery on time

174. *The project has encountered delays due to the start of the war and the planning was revised accordingly.*

Communication

175. *The main communication channels are the website (<http://tradeproject.com.ua/>); the Facebook page (<https://www.facebook.com/ITCUkraine>) and the YouTube channel (<https://www.youtube.com/@itcukraine4554>). This list could have been larger: LinkedIn and Instagram could be added to these (there suggestions from the interviews for this MTE.*

176. *The viewership numbers are not high for the existing communication channels and concentrated in Kiev region*

- The Viewership number is rather low for the webpage (see **Figure 18**);

- *YouTube* viewership increased in 2023, potentially linked to the growing availability of the video-content, but still the numbers are not high enough (see **Figure 19**); and
- *Facebook* views grew over time, but there was a high concentration of the viewers from Kiev region (see **Figure 20**). Men and women 34-55 yrs. of age were the main viewers, with 42.2 percent women. It might be justified to target with awareness activities in other regions from which the project has received the least number of views. Facebook posts feature invitations to webinars, all for participation and then -post participation photos from the trade fairs, and important updates regarding legislation.

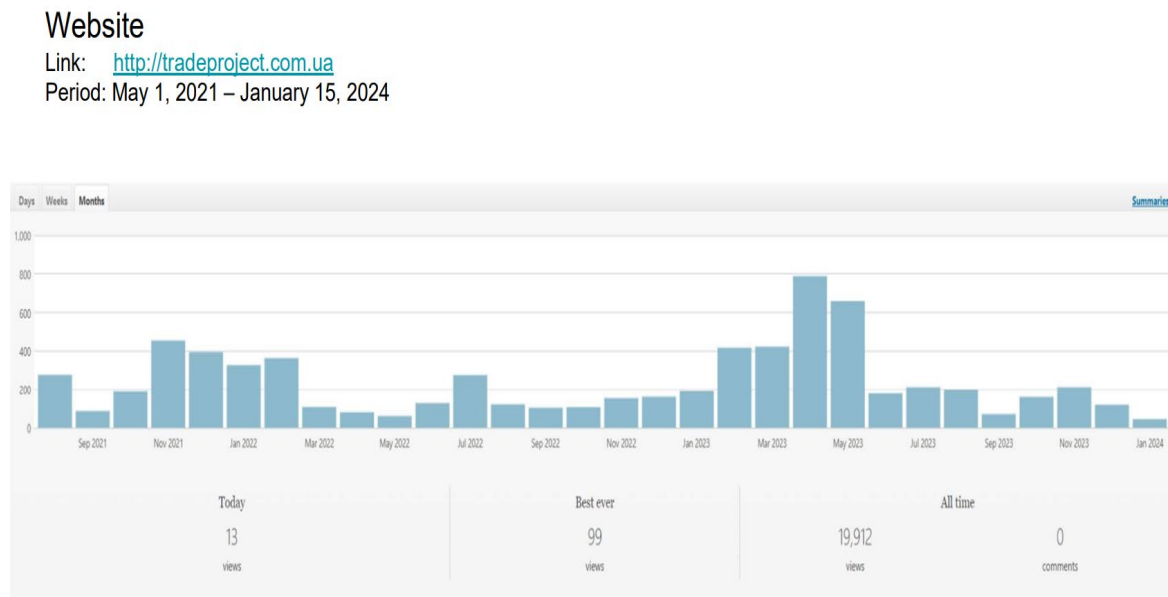
177. *While the project is visible enough, it would have benefitted from improvements.* The MSMEs and BSOs are informed about the project and the opportunities in the course of introductory meetings, needs assessment, events organized for large groups of MSMEs, through the BSOs active in the sector and regional administrations. The project would have benefitted from:

- having a Communication plan.* Plus, the communication consultants (there have been 2 so far) were hired for the implementation of specific tasks, most of which tied to events, mainly trade fairs;
- having a revamped website,* which would feature success stories, links to other development initiatives, links to resources available to the companies (funding opportunities (something mentioned by many interviewed MSMEs), service companies (logistics, certification), etc.);
- having an enlarged mailing list to use for disseminating the announcements on the project events, and products (e.g. the recordings of the webinars).* This could include all the industry associations that engage in agribusiness export in the sectors covered by the project, the National Association of Agricultural Advisory Service (NAAAS, see the *Section 3.5 on Sustainability*); industry websites like <https://east-fruit.com/en/> (linked to UHA), and <https://ukrainian-food.com.ua> (linked to U-Food), etc.; and
- ensuring that the project is given credits on the websites of the partner BSOs, companies and other beneficiaries,* which is not the case currently, as was discussed earlier.⁸⁷

178. *The catalogues for the businesses, participating in trade fairs were the main communication materials developed by the project* A QR code was used with the link to the catalogue for the visitors, who are looking for products from Ukraine, but do not know any company and have no scheduled meetings. Few samples: *каталог_Anuga_2023.cdr* (tradeproject.com.ua); and *Каталог_FA_2023.cdr* (tradeproject.com.ua).

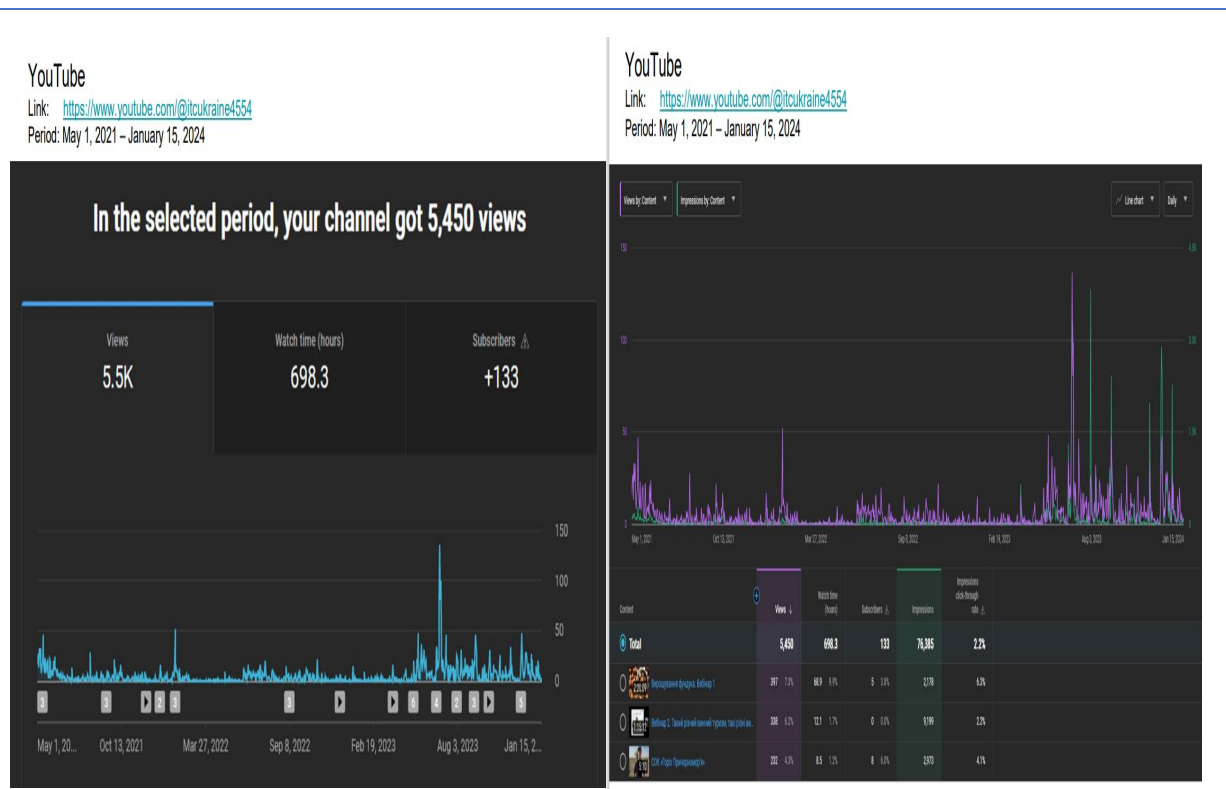
⁸⁷ See also the website of the MAPFU <https://minagro.gov.ua/en/mizhnarodne-spivrobitnictvo/mizhnarodna-tehnichna-dopomoga>

Figure 18: Website views over time



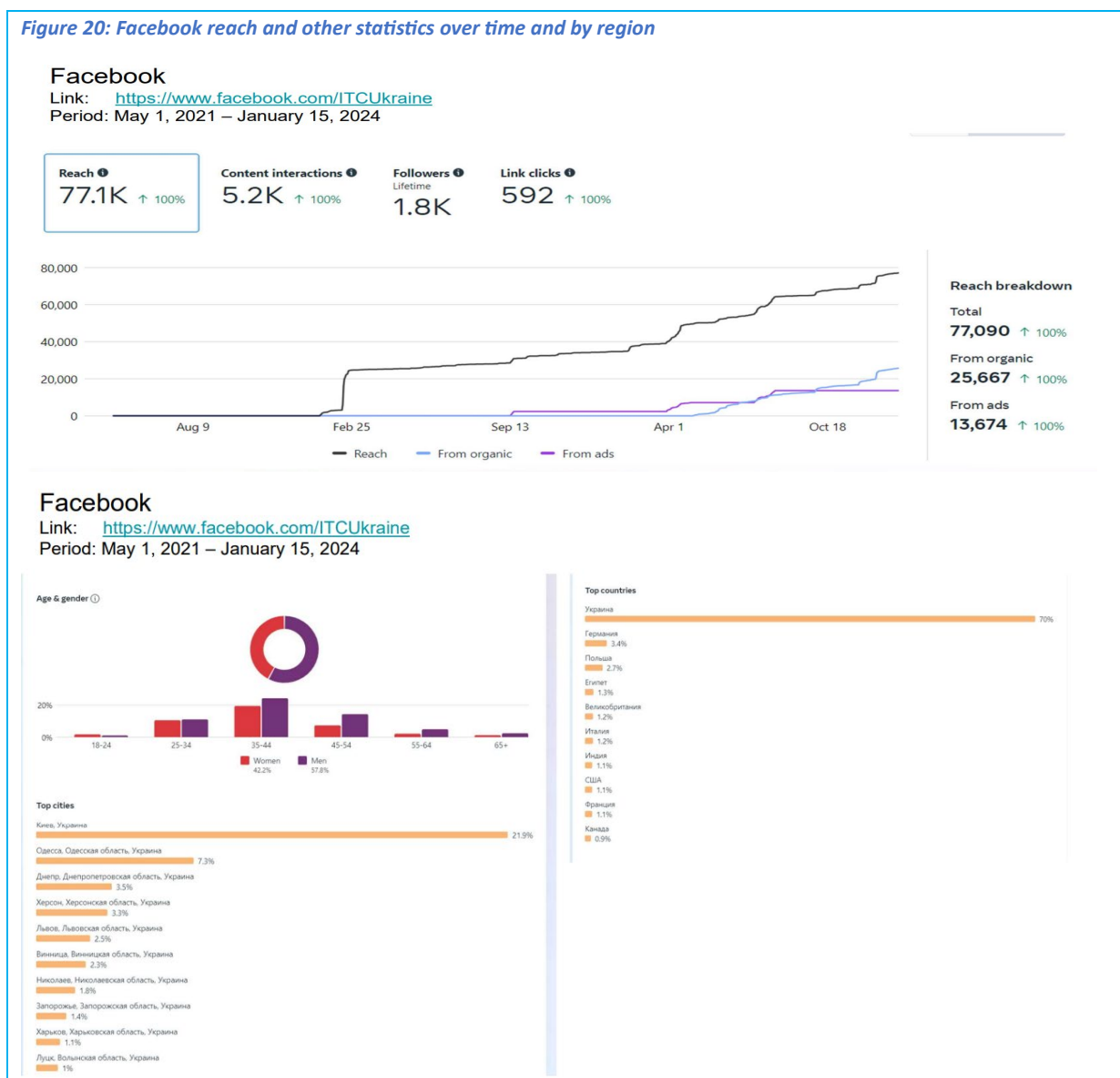
Source; project team

Figure 19: YouTube channel views and other statistics



Source; project team

Figure 20: Facebook reach and other statistics over time and by region



Source; project team

Cost effectiveness and cost-efficiency

179. *There hardly are feasible alternatives that can deliver similar results with the same resources.* There are other initiatives that take companies to trade fairs, including by the All Ukrainian CCI, by the state EEPO, but these only take companies to trade fairs and do not provide comprehensive package of assistance. Plus, they mostly care for processed food companies and the larger one. In comparison to other initiatives in similar sectors, the project’s impact achieved so far compares favorably in terms of money spent

180. *The costs for key inputs, including the use of consultants, are mostly adequate in comparison with the appropriate comparators.* There is a reasonable mix of international and national consultants. The interviewees commented on the good quality of experts. Several of the latter were highly praised by all the interviewees. But, as mentioned the staffing at the national office is too scarce.

Delivery on budget

181. *The spending is in line with the project budget. For many items there is underspending with the only budget line with overspending- with the amounts redirected – on the participation of the trade fairs.* The Project management justified this with the argument that participation in trade fairs was the most demanded activity. This MTE concurs that based on the interviews, participation in the trade-fairs was not only the most demanded activity, but indeed was effective from both learning perspective and in helping find buyers. Having said that, this MTE concurs also with the recommendation from the MTR of the Phase I that the project needs an extra resource for BSO capacity building. In addition, as it was argued earlier, the project needs a PR specialist, engaged continuously. The limited overall budget was also the reason behind the project stopping the engagement of B2B experts and dropping the plans to take the companies for trade missions, Thus, it delivered on the budget, but the budget was limited.

182. *There was no ITC co-financing envisioned for Phase II. The project partner institutions as expected provided, to the extent possible (subject to their limited resources) in-kind contributions, such as staff time, office facilities, etc.*

Resource mobilization and synergies

183. *In terms of resource mobilization and use, there is evidence of partnerships that the project has sought with entities with complementary strengths to coordinate resources for joint objectives.* This specifically applies to the following:

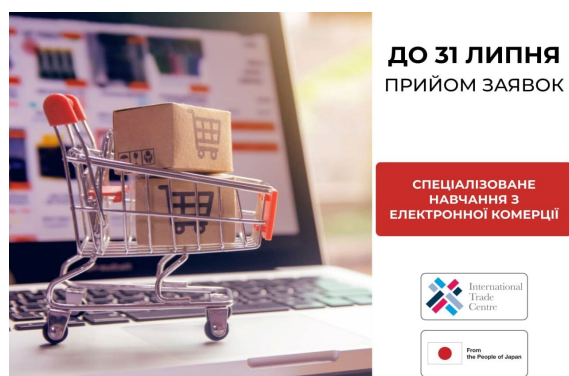
- *ITC Ukraine project on “Building Economic Resilience of Displacement Affected Communities (2023-2027)”.*

The project responds to the emergency needs in Ukraine in the areas of livelihood and economic disruption by contributing to the economic resilience of Ukrainian communities affected by the conflict and resulting displacement. The project focuses, *inter alia*, on contributing to the resilience of

Ukrainian SMEs, primarily in the agribusiness sector, by building their capacities to sell online. A joint training was organized on e-commerce (see [Figure 21](#));

- *UHBDP.* The joint work of the project and the UHBDP delivered solid results during Phase I and at the beginning of Phase II, as UHBDP closed soon after., given that UHBDP prepared farmers on the production level, while ITC project supported them to find new markets for their produce. In 2017, the project organized the first trade forum with national retailers in Kherson, which was the first event of its kind in Southern

Figure 21: Call for training on e-commerce



Source: FB page of the project

Ukraine. The UHBDP supported this initiative and since 2018 has been hosting this forum in the Kherson region annually, including in 2021;⁸⁸

- [UNDP Strengthening SMEs business membership organizations \(BMOs\) project, 2020 – 2023 \(Phase II\)](#).⁸⁹ The Odessa CCI and Zaporizhzhya CCIs received assistance from both this project and the ITC project. The UNDP Project had the objective to accelerate the development of the SME sector in Ukraine by strengthening the capacities of the BMOs. At the beginning of Phase II there was coordination between the two projects with UNDP concentrating on the training of the management and ITC project- on training on ITC tools;
- [SECO \(\(State Secretariat for Economic Affairs of Switzerland\) supported Quality Trade Food program \(QFTP\)⁹⁰ for organic producers/exporters from Ukraine, including with trade fair participation](#). This project, mentioned earlier, has two components: (a) Regulatory framework and business environment for improved product quality and safety; and (b) Capacity development for improved trade capacities, both of which are important for the companies benefitted from ITC Phase II project, specializing in organic products. ANUGA Organic 2023 is a good example to show how several development projects pitched in to support the participation of Ukrainian companies (see **Box 9**). SECO was one of the sponsors of the Ukraine National Pavilion (along with USAID Economic Development, Governance, and Growth Enterprise (EDGE) project, with ITC Phase II project sponsoring the participation of 4 companies outside of the National Pavilion (with other donors doing the same); so as could be seen, the cooperation could have been stronger uniting all the companies under the National Pavilion;
- [USAID Economic Resilience Activity \(ERA\)](#) implemented by DAI, US\$350 million that started in 2022 to bolster Ukrainian agricultural exports and alleviate the global food security crisis exacerbated by the war (AGRI-Ukraine). Under AGRI-Ukraine, ERA partners with public and private companies to complement and leverage urgently-needed grain transportation and trans-shipment investments. Following Russia’s brutal invasion of Ukraine in February 2022 and subsequent occupation of the part of Ukraine, ERA shifted from its focus on Eastern Ukraine to cover development priorities across the country to address Ukraine’s urgent needs in export logistics and infrastructural improvements (see **Box 10**)⁹¹.
- [FAO/EBRD East-Fruit project](#). There was coordination between the two projects. The [East Fruit](#), *inter alia*, organized an International conference on nuts sector in

⁸⁸ UHBDP also partially compensated travel and accommodation costs of ITC project beneficiary SMEs, related to participation in trade fairs in 2018-2019 and also covered costs of local travel within Sweden during SMEs’ study mission

⁸⁹ https://www.undp.org/content/ukraine/en/home/operations/projects/democratic_governance/strengtheningsme-business-organizations.html

⁹⁰ <https://qftp.org/pro-prohamu>

⁹¹ <https://era-ukraine.org.ua/en/about-en/>

Georgia in 2002⁹², inviting UNA, and the UNA signed a [Memorandum of Cooperation](#) with the Georgian colleagues; and

- The [National Board of Trade of Sweden](#), which, in coordination with EEPO and help from the ITC Phase II Project supported beneficiary winemakers (3 MSMEs) and F&V exporters (4 SMEs) with the trainings and mission organized to Sweden

Box 9 Synergies: ITC, SECO, USAID And IPD Germany: Supporting Ukrainian organic producers in search of new export opportunities

[Anuga](#) is one of the world's largest international trade fairs for food and beverages and is the industry's leading event with almost 100 years of history. The trade fair is held every 2 years at the Koelnmesse exhibition centre in Cologne, Germany, and is a platform for finding business partners from all over the world and making new professional contacts. More and more Ukrainian organic producers are using international trade fairs as a way to expand sales markets and export Ukrainian organic products abroad. In 2023, 19 export-oriented organic producers from Ukraine participated in Anuga Organic 2023, including organic cereals, dairy products, oils, nuts, vegetables and fruits, etc. The National Pavilion of Ukraine, organised by the [EEPO](#) in framework of the Ukrainian [national project Diia.Business](#), under the patronage of the [MAPFU](#) in partnership with the [Organic Initiative](#) Public Association and with support from: (a) Switzerland through the [SECO](#) within the framework of the [Swiss-Ukrainian Program "Higher Value Added Trade from the Organic and Dairy Sectors of Ukraine" \(QFTP\)](#), implemented by the [Research Institute of Organic Agriculture \(FiBL, Switzerland\)](#) in partnership with [SAFOSO AG](#) (Switzerland); and (b) Regional USAID Economic Development, Governance, and Growth Enterprise (EDGE) project. [Official brochure of National Pavilion of Ukraine at Anuga Organic 2023](#). It was represented by 6 companies: [Ukroliya, LLC](#); [Catanzaro Eurasia, LLC](#) (Alta Kraina), (Odesa region); [Nutsee, LLC](#) (a partner company for the ITC project); [Galeks-Agro, PE](#); [Organic Milk, LLC](#); [Chemex Ltd, LLC](#)

Outside the National Pavilion of Ukraine, 14 other Ukrainian organic producers took part in Anuga Organic 2023 as participants of collective stands and individually.

- 3 Ukrainian organic companies participated within the booth organised by [Import Promotion Desk \(IPD\): West Berry, LLC](#); [Sav Agro Partner, LLC](#) (Volyn region) (also supported by the [Ukrainian Berry Association](#)): [Amethyst-Ole, LLC](#) (Zhytomyr region).
- 4 Ukrainian organic companies were at the stand, organised with the support of the [ITC "Linking Ukrainian SMEs in the Fruits and Vegetables Sector to Global and Domestic Markets and Value Chains"](#) project funded by Sida:
 1. [Agro Trade Lubny, LLC](#) (Poltava region): a company that has been on the market for more than 20 years, specialising in sale of beans, pumpkin seeds and nuts, including organic ones. The organic quality of its walnuts and beans is confirmed by a certificate from Organic Standard. The company is active on the international market and has gained an excellent reputation.
 2. [Oril-Eco, LLC](#) (Dnipropetrovska oblast): a company founded in 2018, specialising in the cultivation of organic strawberries on 12.8 hectares and remontant organic raspberries on 22.7 hectares in Tsarychanskyi district of Dnipropetrovsk oblast. The company has about 62 organic products certified in accordance with the organic standard, including garden strawberries, raspberries, freeze-dried apples, freeze-dried hard-bore pumpkins, etc. In 2022, despite the difficult situation in the country, the company, together with the [Panfruit Ukraine](#) brand, launched a new berry project – freeze-dried organic raspberries and strawberries. The range now also includes freeze-dried fruit and vegetables.
 3. [Ukr-Volnat, LLC](#) (Khmelnysk region): specialises in the supply of walnut kernels and nuts in shells. The company is the largest authorised certified producer, supplier and exporter in Ukraine. Every year, the company undergoes German quality control to obtain the BIO-Standard certificate. Organic products certified by Organic Standard include walnut fruit and kernel. Blanched walnuts are a new type of organic product.
 4. [GADZ, FG](#) (Ternopil region): farm specialises in growing and exporting apples, pears and plums. In the period from 2011 to 2020, more than 600 hectares of orchard were planted with seedlings grown in Europe. The company offers both conventional and organic products, which are certified by Organic Standard in accordance with EU and Canadian standards. The certified organic products include fresh and dried apples, applesauce, blueberry and raspberry puree, apple juice, apple crisps, etc.
- [USAID CEP](#) in cooperation with [Innovative Farming and Cooperation, NGO](#) and [Ukrainian Berry Association](#) featured 3 companies, including [Terra, LLC](#) (Kharkiv region): specialises in the production of natural food products based on cereals and legumes, and [Eco Berry, FE](#) (Ivano-Frankivsk region): specialises in the production of frozen berries, fruits, vegetables and mushrooms.

⁹² https://www.youtube.com/watch?v=vv_ge6EWGU

- **Export Promotion Center at the Ukrainian League of Industrialists and Entrepreneurs (ULIE)** supported the participation of Zhytomyr Butter Plant, JSC
- The following companies organised their own stands at the trade fair: [ALTE Foods](#); [Darlisad, LLC](#); [Galfrost, LLC](#); [Skvyra Grain Processing Plant, LLC](#)

In addition, 5 Ukrainian organic brands presented their higher added value products, more than 30 items, at [Anuga Organic Supermarket](#): Ukroliya, Alta Kraina, Slow Walnuts, Organic Milk and Galeks-Agro. The aim of this supermarket was to demonstrate products diversity of the entire organic range within the new modern concept of an organic supermarket. The participation of Ukrainian organic companies in the Anuga Organic Supermarket was organised by the EEPO and supported by SECO within the QFTP

For reference: [Catalogue of Ukrainian organic exporters](#); Source: <https://organicinfo.ua/en/news/anuga-2023/>

Box 10 Example of indirect synergies between USAID ERA and ITC

Sadi Donbassa

Sadi Donbassa (<https://gardens.com.ua/>) is based in Donetsk, producing apples, cherries and hazelnuts. Before their engagement with the ITC project, they exported to Belarus, where quality requirements are not too high. They know the project since 2017, when they participated in an exhibition that was organized jointly by the project and Dnepropetrovsk CCI. They participated in many webinars. Many things were new to them and useful. They use Trade Maps now. Also, they learned simplified method of QRs and how to create mini – sites. They participated in project supported trade fairs, starting from going as visitors (FRUIT LOGISTICA, ANUGA, Gulfood) and it helped with contacts: they had a sample sent to Qatar, they had agreement with Baltic countries too, but then the war started and it did not happen. They were supposed to go to trade fairs in 2024, but they refused, as they thought that they will be taking someone else's slot. If there is an interest, they cannot guarantee that they can supply the required quantity. Their region is very risky to work in now, under bombardment, part of their orchards is not cultivated now. They were offered 1-1 advisory services but they refused. They do sell their produce locally but much less than before



They have received assistance from USAID ERA: Equipment grant; Support with GLOBALG.A.P. certification; support with creating their brand book

They are members of the Nuts Association, but their volumes in hazelnuts are very small. They are also members of UkrSadProm: this association try to help, but they do not have much resources.

They would like to see the project focus on the EU market more, given the Ukraine candidate country status.

Aurora LLC

Aurora LLC (<https://www.aurora.zp.ua/en>) Established in late 90s, located in Zaporozhie very close to the firing line. It was one of the largest producers of cherries in southern Ukraine. They produce cherries, plums, also grain. Since the war they cannot harvest 70% of their fruits, as it is dangerous to go there/ They had participated in FRUIT LOGISTICA in 2020 and it was an eye opener. They used to export via distributors before, and did not even know they can export by themselves. They gained clients (UK). In 2023 and 2024 they went to FRUIT LOGISTICA as visitors. One of the reasons is that they cannot be sure they can supply the amounts needed if the opportunity for large contracts arises.



They learned a lot in the webinars, particularly about the nuances of growing and trading in soft fruits

They were affected by the war both directly and indirectly. In 2022, two rockets hit their admin building. They stopped producing apple juice because they do not want to have many people gathered in one place. Also, they applied for the 5-7-9 state loan program but did not get as they were told that their facilities were damaged and so not mortgageable.

They also received support from USAID ERA. It was on 50%-50% basis but got to 70%-30% after the war. They bought a hydraulic cooler, which is very valuable for their cherry business.

184. There are indirect synergies with

- [USAID CEP](#), as it supported the participation of the wine companies in ProWein in 2023 and 2024 (working with the Small Craft Winemakers Association of Ukraine).

At the time of writing this report it was not clear whether this support would be continued after that;

- [GIZ project on "Promotion of Ukrainian wine sector on EU market" 11/2023 – 03/2024](#)
 .At the time of writing this report the project was supporting wine companies with training, having started in 12/2023 only (again working with the Small Craft Winemakers Association of Ukraine). The project is implemented within the framework of the EU4Business programmed.⁹³ which is co-financed by the German Federal Ministry for Economic Cooperation and Development (BMZ) and the EU. The objective is to enhance Ukrainian SME's competitiveness and to facilitate their access to the EU's internal market. On the micro level, the project supports SMEs directly by capacitating them to export to the EU. Ukrainian wine producers are to be enabled to meet the requirements of the EU market through training, advice and the provision of contacts. Moreover, online B2B matchmaking sessions and a B2B mission are planned to organized to build sustainable business relationships between Ukrainian and European companies in the wine sector. Also, the project plans to promote cooperation between these companies by supporting them in developing joint marketing strategies and providing information on the EU market⁹⁴. While the planned support with trade fair participation is clearly a complementary activity to the ITC Phase II project, the seminars⁹⁵ often repeated the themes covered by the latter and were organized without consultation. GIZ is supporting the Union of Craft Winemakers with capacity building in terms of website development and alike;
- [Import Promotion Desk \(IPD\)](#)⁹⁶ - an initiative of the Federation of German Wholesale, Foreign Trade and Services (BGA) and the development organization Sequa GmbH Partner of German Business, funded by Germany's Federal Ministry for Economic Cooperation and Development (BMZ), which, since 2022 has a Special Programme for Ukraine. It supports export ready companies with B2B in several sectors, which include F&V and nuts, with companies applying to it directly. IPD also organizes meetings with other development initiatives active in Ukraine to get referrals of the companies, and there was such a meeting with the ITC/EU Ready for Trade project (berries). As for the ITC Phase II project, close collaboration was not established so far, but 2 of the project companies benefitted also from IPD support, namely, (a) Danube Agrarian, which sold 140 tonnes of organic green lentils to France; and (b) Gadz, which sold 40 tonnes of apples to Great Britain and 300 tonnes of apples to Sweden⁹⁷, according to IPD website. IPD also organizes own stands at the trade fairs, conducts webinars and supports BSOs.

⁹³ programme "EU4Business: SME Recovery, Competitiveness and Internationalization / Utilization and Implementation of the AA between the EU and Ukraine in the field of trade

⁹⁴ The project is implemented by the consortium Eco Viva GmbH (lead partner) and IAK Agrar Consulting GmbH, <https://www.iakleipzig.de/en/references/reference/promotion-of-ukrainian-wine-sector-on-eu-market>; <https://www.linkedin.com/showcase/support-of-ukrainian-wine-sector-on-eu-market/>

⁹⁵ E.g. a two-day training on "Practical Aspects of Exporting Ukrainian Wines to the EU"

⁹⁶ <https://www.importpromotiondesk.de/en/>

⁹⁷ https://www.importpromotiondesk.de/fileadmin/IPD_Flyer/230301_UASP_Factsheet2023_EN_print.pdf

185. *There were also cases where the efforts of the project to establish synergies were not fruitful: the Nazovni program of the Ministry of Foreign Affairs is an example of that*⁹⁸. It is an open online platform that aims to provide consultations for every business and personal manager, essentially an employee of the embassies in the relevant countries. The project's efforts to establish cooperation were not fruitful. The Ministry of Foreign Affairs of Ukraine plans to provide, *inter alia*, (a) consultations for each business (regardless of the degree of export readiness); (b) Personal managers; and (c) Full support at every stage. One of the pilot companies for the project, Nut-see has benefitted from the assistance of Nazovni, visiting the following trade fairs with their support: SANA (Bologna, Italy); NATEXPO (France); SIGEP (Italy); and FOODEX (Japan).

186. *There are recently started three projects by FAO and UNIDO, which could open up more synergy opportunities:*

- *FAO-EU partnership to ensure recovery and development of agricultural value chains.* A US\$15.5 million EU-funded project was reprogrammed to respond to disruptions to the agricultural sector caused by war - to support the functioning, reinforcement and strengthening of value chains in agriculture, fisheries and forestry, and their adaptation to the wartime conditions. The project focuses on supporting producers in Lvivska, Ivano-Frankivska, Zakarpatska and parts of Chernivetska oblast with matching grants for on-farm and value chain-based investments coupled with extension and advisory support. (a) *Lvivska oblast*: Berries; Vegetables; Aquaculture; and (b) *Zakarpatska, Ivano-Frankivska and parts of Chernivetska oblasts*: Hutsul sheep bryndzja, Protected Designation of Origin (PDO); Hutsul cow bryndza, Protected Designation of Origin (PDO); Zakarpattia Honey, Protected Geographical Indication (PGI); Zakarpattia wine. Grants in the range of US\$1 000 to US\$25 000 are planned and beneficiaries will be required to make a matching contribution to finance the proposed investment;⁹⁹
- *FAO and the World Food Programme (WFP) joint programme in collaboration with mine action partner Fondation Suisse de Déminage (FSD), launched in the summer of 2023, to support smallholder farmers and rural families most affected by the war.* The programme has already started in Kharkivska oblast, and will later expand to Mykolaivska and Khersonska oblasts, focusing on farmers with land plots smaller than 300 hectares;¹⁰⁰
- *UNIDO (United Nations Industrial Development organization) project -Global quality and standards programme Ukraine, phase II* (11/2023-11/2024), targeting, better trade for smarter recovery: strengthening quality and standards compliance of berries and nuts. The overall objective of the project is to promote of Ukraine's economic development through the country's integration into the regional and global trade, by strengthening the National Quality Infrastructure (QI) System serving the berries and nuts value chains and increasing SME's competitiveness in terms of capacity to comply with market requirements. The project includes three outcomes that are aligned to the Global quality and standards programme (GQSP), to be implemented over a period of four years: *Outcome 1*: Strengthened QI institutions, by enhancing technical competence and sustainability of the Ukrainian National QI System serving the berries and nuts value

⁹⁸ <https://nazovni.online/>

⁹⁹ <https://www.fao.org/newsroom/detail/ukraine-eu-fao-partnership-for-recovery-of-agricultural-value-chains-040123/en>

¹⁰⁰ <https://reliefweb.int/report/ukraine/ukraine-fao-and-wfp-join-forces-clear-agricultural-land-remnants-war-and-help-farmers-resume-production-enuk>

chains, to offer QI services that better meet private sector needs. *Outcome 2*: Empowered business sector, by promoting the competitiveness of SMEs operating in the berries and nuts value chains through their capacity to comply with international standards and technical regulations; and promoting job creation. *Outcome 3*: Promoted quality culture and a conducive policy framework by raising awareness on the importance and potential of quality and standards for the sustainable development of the berries and nuts value chains, especially in Ukraine,¹⁰¹ and

- *EU-Ukraine Business Matchmaking Platform*¹⁰², that aims to contribute to the implementation of one of the actions foreseen under the EU-Ukraine Solidarity Lanes Action Plan, brings together businesses in the EU and Ukraine to: (a) identify new logistics chains for the export and import of products and materials from/to Ukraine; (b) find new partners for logistics and international trade; and (c) share insights on solutions and initiatives to rethink logistics and supply chains, adapt infrastructure and get the right equipment and machinery to the right place. The platform focuses on several sectors, including export and import of agricultural products: wheat, corn, barley, sunflower, sugar beet, legumes, F&V, etc. This platform complements two other European Commission-supported business matchmaking platforms that are helping address the disruption caused by the war: the Enterprise Europe Network (EEN) Supply Chain Resilience platform and the EU Clusters Support Ukraine forum, see details in the section. There could be important synergy opportunities, and the project should publicize these opportunities for the partner businesses and train them in using these platforms.

187. *The strength of partnerships within the UN family (engagement with UN Resident Coordinator offices [RCO] has improved with the RCO office separating from UNDP as part of UN reform. This was however impacted by the war and the fact that many of the UN staff were working from home during COVID and after the start of the war.* However, the information exchange could have been better and hence synergy building too.

188. *As the interviews for this MTE indicated there is no strong coordination of the projects funded by development partners by the MAPFU, at least as yet*¹⁰³. There is an online donor forum, which Sida Ukraine attends, but this is mostly at the macro level and not going into projects' details. This of course hinders more synergies materializing, and the discussion of all the donor -funded initiatives mentioned in this report, with overlaps, is a manifestation of that. [NB: The variety of designs of displays of the booths from Ukraine during trade fairs is another indication of the lack of strong coordination.: while all the participants from Ukraine at the same trade fair have some minimum level of same logos (from the brandbook that was approved by EEPO), apart from that minimum level (one letter) the rest is different. Ideally there should have been more coordination by the Government].

¹⁰¹ <https://open.unido.org/projects/UA/projects/230215>

¹⁰² <https://eu-ua-solidarity-lanes.seu.b2match.io/>

¹⁰³ there have been certain signals recently of the intentions to improve it, e.g. in the context of BioFach 2023.

3.5. SUSTAINABILITY

189. *The project has been mostly effective in establishing national ownership.* This is true for the MAPFU, especially with regards to the Vine and Wine Sector. Also, the EEPO has mostly displayed willingness to cooperate. Before the war the relevant departments of the regional administrations in Ukraine and the regional CCIs were keen to cooperate, but these were either left in the occupied territories or preoccupied with war. The fact that the coordination of the different donor initiatives by the Government is not strong, as mentioned earlier, is a negative signal about the strength of the national ownership, but it applies to all the development initiatives and not just this project. Having said that it must also be mentioned that the MAPU has a consultation platform where the BSOs (at least the ones that are engaged by the project) are represented.

190. *The project results are somewhat likely to be durable and anchored in national institutions.* Participation at the Trade fairs are being organized by the All Ukrainian CCI, EEPO Ministry of Foreign Affairs, and what could already be observed is that the companies, especially the larger ones that had received training from the ITC project and/or managed their first export contracts with ITC support, then (also) use the opportunities provided by the institutions mentioned- either directly or through sectoral BSOs (see **Quote 10**).

191. *What is less likely to continue- is the training and long—term approach of the ITC project.* Here the capacities of the national BSOs to continue the training and mentoring is still weak, and will require more time and effort. Inviting high-quality experts requires funding, and there is no evidence that the government has plans to do that. Ukraine needs a sustainable program of training in exporting in agribusiness in addition to what the students get at higher educational institutions.

Quote 9: Perceptions about sustainability

...Without the project the participation in the trade fairs will continue but at much smaller scale...fewer companies would be able to afford it and it will take longer for the new exporters to learn

Source: KII

192. *While some of the project instruments, like the ITC Trade Map have been embedded now at the partner BSOs (and some companies), only a few of the BSOs use them in their practice to produce analytical material for their members.* The latter is true for a few CCIs, the Agricultural Export Association and U-Food (the latter is not a project partners), but not yet at UkrSadVinProm

193. *BSOs remain weak, partly affected by the war.* Many of companies had to refuse from the number of services provided by the regional CCIs (including the issuance of certificate of origin (other than EURO-1). Sectoral associations cannot achieve financial sustainability, as most of these cancelled the membership payments (or keep them at nominal level) and cannot increase the number of paid services because of lack of staff.

194. *The ProDoc has an Exit Plan: its materialization has happened to a much lesser degree than planned.* Of course, the war has had its implications in implementing this plan, but it is a time for the project to hand over, gradually, as envisioned in the Exit Plan the organization of the participation at the Trade Fairs to the Partner BSOs

195. *The project increases resilience to shocks and pressure by addressing specific dimensions of fragility and their root causes:* The significance of market connections and established relationships with EU buyers enabled certain exporters to continue shipping goods even during wartime. This swift adaptation was feasible solely because of prior efforts in forging these connections, affirming the success of the project's approach. Export expansion and building partnerships are gradual processes, and outcomes might not be immediately evident. The participation of Ukrainian companies in key global trade fairs serve to maintain these connections, as foreign buyers closely monitor Ukraine's situation and the ability of businesses to honor their commitments.

196. *There is a lack of local experts, with a practical knowledge in the project's sectors including, inter alia, all the aspects along the value chains, as well as purely sales aspects and in particular capable of facilitating B2B: this is a risk to sustainability.* The project used to cooperate more with the higher educational institutions in the Phase I. This could be revived, and if the project gets another phase funding, it could support an internship program at the best performing partner companies, as well as, funding permitting, a training program for selected graduate students abroad. The project should also reach out more to the local consultants, trade brokers and analysts, and invite to the project events.

197. *The project does not provide or facilitate A2F. While the state has some programs of A2F, grant and loan, there are issues with both, as was described. This is a risk to sustainability.* In 2021 SMEs accounted for 99.97 percent of all businesses in Ukraine, generating around 60 percent of gross domestic product (GDP), and employing over 7 million people. During the second half of 2022, SMEs experienced significant losses, with only 6 percent operating at pre-invasion levels¹⁰⁴. There are no specific programs of loans by the commercial banks with favorable interest rates for SMEs in agribusiness. The interest rates are high and the requirements for collateral too strict. There are state programs, but both have issues, as was described (see Section 3.3.2 on the Achievement of Outcomes)

198. *There are however new financial products/support programs that would support export, emerging.* It is important for the project be in the loop and familiarize the pilot companies in these. For example:

- *In July 2023 International Finance Corporation (IFC) announced a risk-sharing facility to increase A2F for the country's smaller businesses.* The support is part of IFC's US\$2 billion [Economic Resilience Action \(ERA\) program](#), launched 2022 to preserve economic activity and job creation amid Russia's invasion of Ukraine¹⁰⁵. IFC plans also to support Ukraine's SMEs which have become increasingly vulnerable amid the deteriorating business environment. IFC established €20 million risk-sharing facility for each OTP Bank and OTP Leasing to support SMEs, especially those in agribusiness or owned by women. IFC will share half the risk on an aggregate portfolio of €40 million extended to key segments of the Ukrainian economy. These are among the first risk-sharing facilities in Ukraine under IFC's Small Loan Guarantee Program, supported by the European Commission, aimed to preserve

¹⁰⁴ <https://eba.com.ua/en/msb-prodovzhuyut-vyplachuvaty-zarplaty-ta-pidtrymuvaty-zsu-popry-zrostannya-finansovih-vtrat/>

¹⁰⁵ <https://pressroom.ifc.org/all/pages/PressDetail.aspx?ID=27670>

jobs, provide essential goods and services, restore supply chains, and generate exports and fiscal revenues; and

- *SECO (via IFC) provides CHF 9.5 million to support guarantees that reduce the risk for loans in the agricultural sector (Agribusiness Blended Finance Initiative).*¹⁰⁶ Banks are thus disposed to provide capital for agricultural companies.

199. *There is lack of knowledge among the businesses on the specifics of the variety of funding sources/programs available for the businesses.* The Project could have information sessions, resource page on its website, as mentioned earlier, helping to reduce the financial risks to sustainability.

3.6. IMPACT

200. *The impact indicators (on the number of jobs created and percentage change on salary of workers) have been added to the logframe based on the request from the donor in 2022 and will be reported at the project close.* The baseline data for the new indicators was collected during Q2 2022 from 40 companies that are project beneficiaries and/or target group of project activities. The same for exports

201. *While there is no solid evidence in terms of affecting the lives of the ultimate beneficiaries, the anecdotal evidence from the interviews indicates that many companies improved their financial standing due to export contracts and hence the opportunities to pay salaries to staff.* There were no figures on employment as yet at the time of writing this report.

202. *The likelihood that the project will contribute to the broader and longer-term national development impact is significant.* Already, as discussed, the project through the Vine and Wine Roadmap helped to foster the development of this sector, which managed to survive despite the war (in 2023 there were 26 small wineries in Ukraine, down from 52 in 2018 and about 100 in 2013¹⁰⁷), including with already a number of regulatory measures adopted. It is likely that there will be changes in the nuts sector as well. As for the F&V sector the project, helps to strengthen the producers, including with making moves to processing as well as organic subsectors. Links are being established with international partners, including international Associations supporting long term sustainable benefits

203. *The project contributes towards international commitments set out in the 2030 Agenda.* This, in particular implies to:

- *SDG 5 "gender equality":* (a) 36 percent of the participants of the training were women; (b) 9 out of 46 (Unique) MSMEs reporting improved international competitiveness were women-owned; (c) 3 out of 12 (Unique) MSMEs that have transacted international business were women owned;

¹⁰⁶ <https://www.seco-cooperation.admin.ch/secocoop/en/home/laender/ukraine.html>; and <https://pressroom.ifc.org/all/pages/PressDetail.aspx?ID=21715>

¹⁰⁷ <https://www.rferl.org/a/ukraine-war-wine-industry-struggles-successes/32725692.html>

- There is evidence that the project contributes to *SDG 12 "responsible consumption and production"*, e.g. by enhancing the wine producers; knowledge in sustainable viticulture and promoting organic F&V sector;
- There are companies, supported by the project that promote innovation, contributing to *SDG 9 "industry, innovation and infrastructure"*: (example, Vesta-Leader Ltd. winning a prize at Gulfood for watermelon oil). Furthermore, hazelnut companies introduced innovative pruning methods, benefitting from the advice of the international consultants, hired by the project, and study visits.
- *SDG 8 "promoting sustained, inclusive and sustainable economic growth, full and productive employment"*: although at the time of writing this report, the figures were not available as yet, the evidence from the interviews suggest that the project helped to at least maintain the employment, due to the companies' gaining export contracts and expanding their production and sales

204. *Unintended positive consequences of the project include (a) increased export of wines and (b) cooperation among the participants of the trade fairs.* While this was not among the project's objectives, the companies and winemakers' associations, having strengthened their capacities managed to utilize the opportunities to exhibit in international trade fairs for winemakers, that were offered by other development partners (USAID CEP and National Board of Trade of Sweden). There was another positive unintended consequence in that there were 2 cases, when the companies, having met at the trade fairs, had established cooperation.

Box 11: Filbert (and UNA)

Filbert (<https://filbert.com.ua/>) is based not far from Odessa. It is the biggest farm of hazelnuts in Ukraine. They have been with the Phase II project since it started.

The company staff benefitted from the *training*: they implemented many of the recommendations re pruning, irrigation, etc. They never intended to open factories for processing, but the advice from the ITC experts and what they saw at the trade fairs and study visits convinced them, and they opened 2 factories; turned out to be the best decision. They also used the advice they received regarding caramelization. They have been on *study tours* in Georgia, Italy and such *trade fairs* as SIAL (France), ANUGA (Cologne) and Gulfood (Dubai). They decided to drop Dubai in 2024, as the EU market is more promising. After the EU trade fairs, they managed to sign export contracts. Now they export to Romania, France and Italy. The support with the costs for trade fair participation was essential: on their own they could not afford it.

The Director of Filbert is also the Vice-Chairman of UNA. The project's assistance was very useful with the Roadmap and the Action Plan for the UNA. They are now lobbying the Rada Agrarian Committee to ensure legislative changes to stop grey/black exports. They also would like for some support programs to be reinstated, to be partially compensated for the cost of equipment (30 percent). As an association they also work with the Ministries: MEDTU and MAPFU. They recently reached an agreement with the project to produce an electronic booklet – A-to-Z for small farmers

The company got 200.000 US\$ (8 mln hryven) grant from the MEDTU, which need to be returned in taxes in 5 years. The company cooperates with others with respect to trade fair participation. Recently they visited a trade fair in Switzerland with the EEPO.



Box 12 Farm GADZ: indirect synergies with IDB (Germany)

Farm GADZ <https://fg-gadz.com.ua/en/> was established in 2011, based in Nikolaev oblast. The company has offices not only in Ukraine, but also in Poland (with 2 people). They plan to open offices in other countries too. The company has orchards 700 ha, growing apples, pears and plums. 2 years ago, the company opened a factory for processing.

The company started cooperating with the project 3 years ago. Participated in trade fairs with ITC project and appreciate the support with the costs as paying on their own would be too expensive (they tried once, on a cost-sharing basis before; and also attended as visitors). This is how they started exporting and it is growing: they export now to the UAE and Saudi Arabia (together – 70 percent of their exports), plus Oman, Bahrain, Kuwait

They got in touch with IDB (Germany) and got help in connecting with interested buyers during the trade fairs. They also cooperated with USAID.

In a short time, Gadz Farm has become one of the largest companies in Ukraine, specializing in growing fruits (apples, pears, plums). They now export to more than 20 countries in Europe, the Middle East and Asia.

They are members of UkrSadProm. The Association helps with lobbying at the MAPFU: this is the main benefit.



3.7. CROSS-CUTTING

205. *Both Sida and ITC have development markers related to social environmental impact, impact on gender equality and women’s empowerment as well a youth, and more.* The objectives set out in the *Strategy for Sweden’s reform cooperation with Eastern Europe for 2021–2027* include human rights, democracy, the rule of law and gender equality; peaceful and inclusive societies; environmentally and climate-resilient sustainable development and sustainable use of natural resources; and inclusive economic development. Development markers set out in *ITC’s Mainstreaming sustainable and inclusive trade Guidelines for ITC projects* include gender equality; inclusion of youth; green growth, and social responsibility – including human rights.

206. *The project has contributed to women’s empowerment: the monitoring of this could have been better (e.g. changes in the positions in the companies, which was cited as one of the objectives of the project in the ProDoc), as well as (as was planned) producing and disseminating video interviews with the women -heads of the SMEs that are beneficiaries of the project*

- 36 percent of the participants of the training were women, but their career progression was not monitored;
- 12 out of 46 SMEs reporting improved international competitiveness were women-owned; and 2 out of 13 SMEs that have transacted international business were women owned; and
- There was one webinar organized together with Rural Women Business Network, which was focused on the EU requirements towards food products imported from Ukraine, and how ITC Market Analysis Tools can help SMEs to learn more about food safety requirements. The interview with the latter indicated that there was an overall satisfaction with it, but results were not monitored: nor it was expected that the participant -women will start exporting after that. There was an understanding however that there could be further engagement with them (e.g. on e-commerce), but that this needs to be dictated by a needs assessment. There are few other women associations like Council of Women-Farmers (Ukraine), Women in Business (Vinnitsa)- mentioned in the ProDoc and with which there was a plan to cooperate- which can be involved in awareness raising, capacity building and networking activities to build effective regional cooperation between the relevant stakeholders to advance gender equality

207. *The project has contributed towards green growth (environmentally and climate-resilient sustainable development and sustainable use of natural resources), by covering a certain number of related training modules.*

This was achieved by (enhancing the vine-growers' knowledge of sustainable production and by fostering supporting exports of organically grown products (together with the SECO-funded project). In particular, the series of 6 online training modules were conducted to raise awareness of Ukrainian vine growers and wine producers on the application of the principles of sustainable development in viticulture and winemaking:¹⁰⁸, including on (a) soil erosion control, (b) phytosanitary protection management, pesticide reduction, (c) low greenhouse gas technologies, (di) waste management, packaging and

phytosanitary wastewater. (12 participants, including 5 women; 3 SMEs, 1 BSO); (e) green building, (f) landscape integration, (g) energy efficiency and alternative energy sources (solar- and geothermal energy, energy recovery from grapes and winemaking by-products), (h) water

Quotes 10: Perceptions on the effects of the project on issues like environmental sustainability, gender and CSR and SMEs

...ITC helped expand our company's sustainable development program...

.... The company is certified according to GlobalG.A.P. standards. The management team consists of young professionals, and product preparation for sale is mainly carried out by women. The company provides assistance to its employees and the local communities where it operates.

...Mandatory integration of sustainable development elements into the production process.

.... Thanks to the opportunity to receive consultations from James Fitzpatrick, we gained new ideas for creating our ecological brand of organic walnuts.

...The proportion of women in the team has significantly increased. The average age of the staff is 26 years. The last 2 vacancies were filled by students in their final year of study, who completed their education while already working in the company.

...We are considering issues related to reducing the environmental impact, and to the responsible use of energy resources.

...We plan to cultivate a vineyard using disease-resistant grape varieties for the production of organic wines

Source: The online survey

¹⁰⁸ The modules included

- Module 1, "General issues of sustainability in the vine-growing and winemaking sector", covered: (i) key economic, social and environmental challenges (climate change, biodiversity loss, water and resource depletion, waste generation), (ii) experience and heritage values in the wine sector, (iii) social/community and environmental responsibility, (iv) sustainability assessment tools (life cycle analysis, carbon balance, human footprint), (v) key international requirements, accreditation of viticultural approaches to sustainable development at the international level, (vi) fundamentals and implementation of the environmental/sustainable management process. (21 participants, including 6 women; 10 SMEs, 3 BSOs);
- Module 2, "Sustainable development management", focused on: (i) main aspects in the wine sector (ecology, food safety, staff safety and comfort, cellars and vineyards in their natural environment), (ii) international standards ISO 14001 and ISO 26000, (iii) certification process, (iv) global viticulture and winemaking strategies, (iv) sustainable development management and control tools, continuous improvement process, (v) communication tools, drafting a sustainability report. (23 participants, including 8 women; 11 SMEs, 2 BSOs);
- Module 3, "Grapes and climate: basics, climate risks, adaptation to climate change, reduction of the greenhouse effect", covered: (i) climate characteristics (climatic zones, microclimates, measurement methods), (ii) climate and viticulture (climate indicators, impact on the phenology and physiology of vine); adaptation of management practices and grape varieties, (iii) IPCC scenario activities, main impacts, adaptation potential of vineyards and wine production, (iv) adaptation to extreme conditions (spring frosts, hail, water stress), (v) reduced impact of the greenhouse effect (carbon footprint, adaptation of agricultural practices for growing grapes, climate plan). (19 participants, including 6 women; 12 SMEs, 1 BSO);
- Module 4, "Biodiversity of vine-growing terroirs", focused on: (i) national and international challenges, accreditation systems and regulatory framework, (ii) biodiversity assessment systems, (iii) operational approaches within sites and terroirs, (iv) new areas – agroecology, agroforestry, wine cellar biodiversity. (13 participants, including 3 women; 6 SMEs, 2 BSOs);
- Module 5, "Introduction of integrated, sustainable, organic and biodynamic vine-growing and winemaking", covered: (i) global viticulture approaches, (ii) protection of users of vineyards and surrounding areas, (iii) establishment of a vineyard and its development in terms of landscape and biodiversity, (iv) soil management, herbicide limitation, carbon storage, (v) soil erosion control, (vi) phytosanitary protection management, pesticide reduction, (vii) low greenhouse gas technologies, (viii) waste management, packaging and phytosanitary wastewater. (12 participants, including 5 women; 3 SMEs, 1 BSO);
- Module 6, "Eco-design of wine cellars", covered: (i) green building, (ii) landscape integration, (iii) energy efficiency and alternative energy sources (solar- and geothermal energy, energy recovery from grapes and winemaking by-products), (iii) water management, (iv) environmental management of wastewater from wineries, (v) workers' comfort and safety. (12 participants, including 5 women; 4 SMEs, 2 BSOs).

management, (i) environmental management of wastewater from wineries (12 participants, including 5 women; 4 SMEs, 2 BSOs), etc. The project plans to conduct trainings in sustainable development for other sectors producers in April 2024.

208. *While some farmers have adopted solar panels to conserve energy, their numbers remain limited.*

209. *The project trained young specialists of the following companies* - Nash Product, Vegetable plant Kherson, and Sofia Nuts. There was no overall approach developed however.

210. *The project has contributed towards CSR (inclusive and economic development) by*

- *supporting companies with training that enabled them to become GlobalG.A.P. certification.* Companies that have secured Global GAP certification have enhanced their production techniques, notably by minimizing pesticide use. There was an online orientation workshop "GRASP – Social Responsibility Certificate for the European market" organized in cooperation with the UHBDP to cover the EU requirements for fruit and vegetables, various international certificates required for exports and, in particular, GLOBALG.A.P. Risk Assessment on Social Practice (GRASP) [During phase I the project assisted to implement GRASP (CSR certification within GlobalG.A.P.) for 2 companies - Sadi Dnipra and Danube Agrarian. CSR is part of the increasing awareness of the project in market requirements, as well as sustainable development]
- *Many of the project partner companies located in the Central and Western part of Ukraine hire IDP from the areas occupied or affected by the war,* e.g. AlmaFruit, USPA, and Danube Agrarian. [NB: Danube Agrarian provided the facility for relocated project beneficiary - Ukrainian Dried Tomatoes];
- *Strengthening the companies, which then were better positioned to comply with the requirement of the Ukrainian legislation for the companies to have disabled people on staff.* If the company is growing in export than they need more staff. The rule is one disabled person per eight to fifteen people on staff.

211. *In 2022 the United Nations Development Programme (UNDP) in Ukraine signed an MoU with the MAPFU to cooperate on increasing the competitiveness of Ukraine's agriculture sector.*¹⁰⁹ *The cooperation is planned to involve, inter alia, improving access to green financing for Ukrainian agriculture producers, and promoting environmental, social and governance (ESG) principles of management.* It would be important to ensure close cooperation with this project when it materializes in the context of ESG training

212. *As for the human rights no specific contribution could be mentioned, except that, the online modules covered such issues as workers' comfort and safety*

¹⁰⁹ <https://www.undp.org/ukraine/press-releases/ministry-agrarian-policy-and-food-ukraine-strengthen-agriculture-sector-undp-support>

4. CONCLUSIONS

213. *The project was relevant at the time of its design and became even more relevant since the war with Russia started, but then the budget was small for the enlarged scope.* Supporting the SMEs exporting F&V and Nuts to continue operations and enter new markets- EU but also Guld countries and beyond was relevant. The design of the project was relevant, focusing on the southern Ukraine only at the start. Given its not large budget the decision to expand the coverage to the whole of Ukraine was a correct one given that the project "lost" almost half of the companies due to war, as many got destroyed, stooped operations and/or remained in the occupied territories. However, for a project covering 4 sectors, the project would have needed more financing if it got more active in attracting new partner companies; at the moment while every year new companies partner with the project, the project is not reaching the full potential of covering the relevant companies. While the project does not support explicitly exports in the vine and wine sector, there are other development initiatives that cover that gap, utilizing the results of the efforts by the Project in sector development and training of the companies. In terms of the relevance, what is perhaps less relevant is the approach and resource allocation for the capacity building of the BSOs, as this requires more sustained efforts, more consistent, with clear milestones, plans and monitoring.

214. *The project did not have explicit component on policy advice, but through the Sectoral Roadmaps it affected the improvements in the regulatory environment, especially in the vine and wine sector.* This way it is in line with the Sweden's Market Systems Development Approach. If the project gets another phase funding this could be made a more explicit part of the project.

215. *The project was coherent at the time of its design, complementing the existing, not many, similar development initiatives. The latter became more in number after the war started, but still, the project has its unique features,* including systemic/sectoral approach, that includes roadmaps' development, strengthening of the BSOs and capacity building of the MSMEs with training and study tours, preparing them for the trade fairs and supporting participation in those.

216. *While the project is not likely to reach some of its targets, the reasons are mainly external, with the war being the key one.* It has become evident already in 2022 that not all targets can be met due to the onset of the war and the subsequent occupation and attacks on r project focus regions. Despite these challenges, there was a unanimous decision by the PSC in 2022, with the donor in attendance, to continue the efforts to bolster the morale of the businesses, maintain operations, and preserve contacts; the decision was made understanding that ceasing operations could result in significant costs and have a devastating negative impact. The project has however trained many more companies and people, has helped them improve their capacities and supported more than was planned with the participation in the trade fairs. While figures on the impact on the volumes of export will be available at the end of the project only, the KIIs and survey conducted for this MTE indicate that most of the partner companies were successful in that. The project has helped to enhance the capacities of the BSOs too, but here the progress was slow and slower than expected by design, again affected by the war, among other reasons. Most of the BSOs (and companies too) became familiar with ITC tools however and use them in their support services to their member companies. The UNA is the case of successful capacity building as it is working towards professionalization, having its mission,

vision and Action Plans developed with the support from the project. The other two key partner BSOs (UkrSadVinProm and the National Association of Agricultural Advisory Service (NAAAS)) while have improved still have a way to go towards professionalization and becoming truly legacy partner institutions for the project. UkrSadVinProm, together with smaller associations in the wine and vine sector (Association of Craft Winemakers of Ukraine and the Associations of Craft Winemakers of Black Seas Coast) together with the All Ukrainian CCI, using the Roadmap, developed with the support of the project were successful in achieving changes in the regulatory environment that resulted in a sharp increase in the small wineries.

217. None of the partner sectoral associations covers vegetables sector, and most of the companies specializing in this were left in the occupied territories. If the project gets further support, this should be one of the areas to focus on

218. *The project has put a lot of emphasis and larger share of financial resources than planned in supporting participation of the companies in Trade fairs: this is what is appreciated most by the companies and was overall justified, but potentially needs certain minor modifications in the future.* The project should try and design a system of varied contribution by the companies towards the costs: currently all of them get full support with the cost of the booth/stands. This should be withdrawn for the large companies (more than 250 employees) and, potentially, the most experienced in exports, that have been with the project for more than 4-5 years. There are technical difficulties in doing this, but potentially solvable.

219. *The project arranged for B2B support during the trade fairs in the beginning of Phase II (continued from Phase I), but then stopped due to, inter alia, high associated costs, but the need/the desire by the MSMEs is there.* It should be noted that B2B support was stopped not just because of costs, but also because it was assessed that B2B works best under certain conditions, and often for large and/or advanced businesses that meet market needs well and that for the MSMEs it might not work as well. It was assessed that B2B might not be cost effective in the case of most of the MSMEs that the project supports, with an argument that the project can only help a few businesses at a time and connect them with a small number of interested buyers. This, as well as trade missions have been mentioned by the businesses as needed, however, and if the project receives further funding, is something to potentially engage in, with a careful design.

220. *The project has been efficient, cost effective and the management displayed strong adaptive qualities in the face of adversities, that included the war and the COVID.* There was also restructuring in the government with the Ministry of Agriculture and Food being part of the MEDTU at the start of the Phase II. The project could do better in its awareness raising/communication activities. While the project has synergies with a few other development initiatives, there are others that could be explored. The project could have done much better in terms of capturing and sharing success stories.

221. *The project has made progress towards the sustainability of its results, but more concerted effort (and time) is needed.* Trained businesses and BSOs are the important building blocks in that. There are national initiatives that take companies to trade fairs (CCI, EEPO and private initiatives), operating on full cost- recovery basis. The main concerns about sustainability lie with the BSOs, especially sectoral associations; there are very few of them that

provide valuable services for their members and changing this situation requires more time and effort and even then, there would be risks to sustainability.

222. *As for the sustainability of training, what the project could have done, is find a better use for the recordings of the webinars ensuring their wider distribution and having several "homes".* What the project could do, if here is further funding available, is have some activities (internship and study abroad courses) to help fill the gap with local experts, that is there currently.

223. *Based on the interviews, the project is having an impact not only in terms of experts' growth but also growth in employment.* In fact, in the current circumstances even maintaining the workforce is an achievement. Data would be available only towards the end of the project however.

224. *The project has undertaken certain measures towards supporting improved environmental and social governance (ESG) and CSR, but there is a need for much more and the need is growing given the EU candidate country status.* While the project had several training courses on waste' recycling and more ecologically friendly methods of production, as well as supporting companies getting Global G.A.P and HACCP certified with training, if there is more funding available, it could expand this with topics on circularity, nature- based solutions (NBS), green operations, CSR, etc.

225. *The project had measures to support women's empowerment, but could do more with better monitoring of results.* 9 out of 45 SMEs reporting improved international competitiveness were women-owned; and 2 out of 13 SMEs that have transacted international business were women owned. The project involved 36 percent of women in training. It has organized one training event on e-commerce with the Rural Business Women Union There could be more efforts in this direction with other such unions and other related topics.

226. *With its approach, the project ensures that there is a balance between continued support to the companies which have been with the project for several years and are getting stronger year on year, and the companies that are export ready but only on the beginning of the exporting, and are relatively smaller. This way the project ensures the application of the principle of "equity", in line with the LNOB principle of the UN.* The project, indirectly, contributes also to the improvements in the livelihoods of the poor and marginalized: with the support to IDPs (as many companies employ them) and disabled (becoming stronger the companies have to, by law, ensure having disabled on the staff).

5. LESSONS LEARNED

227. The following summarize the key lessons learned

- *flexible design of the project has proved to be very important in the face of the war that erupted and COVID;*
- Roadmaps, study tours, training on the topics with wide coverage, individual advisory support to companies, support with trade fair participation, including preparation- all of these together for a logical systemic *sectoral approach has proved to be effective and valued by the businesses*. But the elements on policy dialogue, which are currently tackled through the roadmaps could be added in the future if there is further funding.
- *Companies in the east, in the close proximity to the front line, need other type of assistance too, e.g. cofinancing for equipment, affordable loans, cost covering for certification, etc.*
- *The project approach to involve the representatives of state bodies in study tours proved effective in tackling regulatory challenges.*
- *Market linkage events are seen by businesses as the most fruitful activity organized by the project, hence the need to continue and further intensify presence at trade fairs and organize continuous buyer-seller (B2B) meetings.* There are companies with varying degrees of need for the coverage of their share of the costs with the booths.
- *Association building requires time, specialized knowledge and carefully designed approach.*
- *active involvement of local BSOs and national consultants in the implementation of the project activities contributes to enhancing local capacities,* ensuring local ownership and sustainability of project results;
- *Companies achieve better results when they are strongly committed and ready to invest time and money in long-term ties with foreign markets;*

6. RECOMMENDATIONS

(A) In the remaining period:

3. Improve the website, especially with success stories; and
4. Establish contacts with the agricultural extension service, higher educational institutions and alike, to raise awareness about the recordings of webinars.

(B) Potential 3rd phase:

1. **Continuity of Current Strategies** for the Nuts, Wine, and F&V sectors, would be important to foster their competitiveness, resilience, development and sustainability. It is recommended that the proposed 3rd phase includes, *inter alia*, the same components as in Phase 2, namely

- v. development and update Roadmaps for all subsectors;
- vi. training, study tours and direct advisory support, ensuring the coverage of aspects on environmental sustainability, circularity, and CSR;
- vii. deepening support to BSOs to enhance their capacity in providing relevant services to stakeholders; and
- viii. strengthening market linkages with new markets (in addition to the EU and Middle East), involving more SMEs and including digital presence enhancement and continued support for trade fair participation (with, potentially, a variable approach to experienced companies with longer than 4/5 years of export history with the project), investigating the option of trade fair participation for the wineries too.

2. **Potential new components**, including:

- vii. policy dialogue, especially related to trade simplification for targeted products to targeted markets;
- viii. support to training of new cadre of local consultants – with an internship program and study abroad courses,
- ix. assistance with the costs of certification for the companies in the east (near the frontline);
- x. sector-specific trade facilitation interventions to address the unique needs and challenges of the Nuts, Wine, and F&V sectors and Trade Missions (e.g. to Sweden and Italy) targeting key markets and facilitating interactions with buyers and industry stakeholders and study tours;
- xi. development of e-learning tools; and
- xii. assessments to identify post-war rehabilitation needs

3. **In the potential 3rd phase, Sector-Specific Recommendations** include:

d. **Wine sector**, *inter alia*

- vii. support wine tourism as a part of development of rural areas;

- viii. assist the Ministry of Agriculture and Food in implementing wine register as a part of EU integration;
- ix. support the development of marketing and information strategy for the brand Wines of Ukraine;
- x. support the Laboratory with training;
- xi. support the development of Vision and Action plan for wine associations as well as service portfolio; and
- xii. training on other value-added products from the grapes and diversification
- e. **Nuts sector**, *inter alia*, together with the UNA, work with the government to improve the regulatory field related to the nuts sector
- f. **F&V sector**, *inter alia*,
 - v. focus on the relocated and new vegetable sector farmers
 - vi. deepen BSO support to address sector-specific challenges and facilitate market linkages;
 - vii. implement targeted trade facilitation interventions tailored to the unique needs of the F&V sector; and
 - viii. support training on Deeper processing of F&V and product diversification

4. **In the potential 3rd phase the project should ensure enhanced coordination and outreach**, including:

- d. closer coordination with partners (other projects) for trade fair participation and market access initiatives;
- e. a more transparent, score-based system for the selection of companies supported financially for trade fair participation; and
- f. improved outreach and awareness raising, using other associations as vehicles for that, LinkedIn and Instagram and an improved website (with success stories and analytical materials).

228. *In the remaining period* it is recommended that the project takes action to

- a. improve its website, especially with success stories; and
- b. establish contacts with the agricultural extension service, high educational institutions and alike, and implement measures ensuring continued access to the recordings of webinars

Annex 1: Audit Trail

No.	Identifier	Question or Comment	Evaluator Response
1	Executive summary	Please include a section addressing conclusions in order to draw the logical links between the evaluation findings and recommendations.	done. This is not a widely accepted practice however, since the conclusions follow evaluation criteria - as is the executive Summary (in a much concise form than Executive Summary) and so it does not read well, and unavoidably leads to some repetitive sentences.
2	Page 7, paragraph 2	As far as I have been informed there was not a caveat to not cover export promotion measures for vine and wine sector, but it should have been aligned with the program officer before going to trade fairs. This seems to have been unclear in the project, maybe it should be re-written as an misunderstanding?	(a) it now reads like this " Phase II of the project included also vine and wine sector, with the caveat that it concentrates on quality and sector development, rather than export promotion (there was a lack of clarity whether Sida could support trade fair participation for this sector when the Project document was being formulated and this was to be clarified by Sida later on, but was not at the time of writing this report)". (b) it is confusing to hear different versions of the background of this issue from various stakeholders: NPM, PC, Sida, etc.
3	Page 7, paragraph 3	The description of Objective and Outputs are slightly confusing with objectives from Phaze I in the middle, and Outputs not formulated exactly as in agreement.	(a) the part on Phase 1 is removed; (b) it is ensured that the formulation of the Outputs are as in the ProDoc
4	Page 8, paragraph 5	Re: "The project was relevant at the time of its design..." Thank you!!!	no action required
5	Page 8, paragraph 7	Re: "...its unique features, including systemic/sectoral approach, that includes development of roadmaps strengthening of the BSOs and capacity building of the SMMEs with training and study tours, preparing them for the trade fairs and supporting..." Good point, appreciated!!!	no action required

No.	Identifier	Question or Comment	Evaluator Response
6	Page 8, paragraph 8	<p>Re: "...many of its targets,..."</p> <p>It's a midterm evaluation; some goals remain attainable, while others, like BSOs, are less likely. Suggest to change with "some"</p> <p>I propose replacing "many" with "some" or "not all" to reflect our current status more accurately.</p> <p>Suggest to add: "It has become evident already in 2022 that not all targets can be met due to the onset of the war and the subsequent occupation and attacks on our project focus regions. Despite these challenges, there was a unanimous decision by the Project Steering Committee in 2022, with the donor in attendance, to continue our efforts. Our objective is to bolster the morale of businesses, maintain operations, and preserve contacts. This decision was made understanding that ceasing operations could result in significant costs and have a devastating negative impact."</p>	<p>* fine, changed to "some"</p> <p>* the suggested para added</p>
7	Page 9, paragraph 10	<p>Re: "...get full support with the cost of the booths/pavilion,..."</p> <p>Support is equal for all, but not full, as companies still share costs. During the war period, a higher level of cost sharing applies.</p> <p>A differentiated approach can be costly to implement for small groups, often exceeding expected savings.</p>	<p>(a) the phrasing is correct: it says "full support with the costs of the booths". Elsewhere in the text the report mentions that companies cover their other costs (b) the report says "try and design a system of differentiated approach": it's a very careful phrasing. No change made</p>
8	Page 9, paragraph 12	<p>Re: "The project could have done much better in terms of capturing and sharing success stories."</p> <p>Agree with the finding; small projects often face dilemmas on where to focus efforts due to limited resources.</p>	no action needed
9	Page 9, paragraph 13	<p>Re: "...and so this is not affordable for the SMEs at the start of their exporting journey."</p> <p>Good it is captured.</p>	no action required
13	Page 11, Recommendations 1	<p>Re: "...the project should"</p> <p>For (b) Relevant for medium and long-term strategies and larger scale interventions, but challenging for the ongoing project due to institutional conditions and the project's available resources.</p>	<p>disagree. This is not a lot of effort. I interviewed the chairman of the Agricultural Extension Services NGO: they would benefit from it as well as the ensuring that the higher educational institutions (agri). This is not about curricula reform, but ensuring that the training materials are known by them, with the expectation that these would be used.</p>
14	Page 11, paragraph 1 a	<p>What are the reasons for this recommendation? Maybe it is elaborated somewhere else?</p>	it is elaborated in the Section on Communications under efficiency

No.	Identifier	Question or Comment	Evaluator Response
15	Page 29, Figure 3	I would move "Improved legislation/business enabling environment" and "Improved value chains and market access" to the category of "long-term outcomes"	(a) moved "improved value chains" to medium term outcomes (b) but legislative changes is left in short term outcomes. In the case of wine and vine business this was the case. Its not that essential
16	Page 41, last bullet point	Re: "having exit strategy, presented earlier" Did not find one presented earlier.	reference added
17	Page 92, paragraph 200, 3rd bullet point	The special export credit guarantees from the Swedish Export Credit Corporation are targeting export from Sweden to Ukraine, so this is not connected to Ukrainian export. (Clarification from EKN's web page: The exporter, or a bank financing a Swedish export transaction, is the applicant and holder of an EKN-guarantee. The guarantee facilitates financing and makes it possible for the exporter to offer better credit terms. Both a Swedish company and a non-Swedish company can be the exporter in a transaction guaranteed by EKN. Our requirement is that the export transaction is related to Swedish exports, directly or indirectly, and that it is of benefit to Sweden.)	removed. It was confusing because the article I found referred to (quote) "...Ukrainian exporting companies..."
18	Page 95, paragraph 206	Change "Borth" to "Both"	corrected
19	Page 102, paragraph 217	Re: "While the project has not reached many of its targets,..." I recommend replacing "many" with "some" or "not all" to reflect our current status more accurately. It has become evident already in 2022 that not all targets can be met due to the onset of the war and the subsequent occupation and attacks on our project focus regions. Despite these challenges, there was a unanimous decision by the Project Steering Committee in 2022, with the donor in attendance, to continue our efforts. Our objective is to bolster the morale of businesses, maintain operations, and preserve contacts. This decision was made understanding that ceasing operations could result in significant costs and have a devastating negative impact.	* replaced with "some" * the recommended para added
20	Page 103, paragraph 220	Re: "...stopped due to the high associated costs,..." We stopped not just because of costs, but also because B2B works best under certain conditions. It's great for big, advanced businesses that meet market needs well. However, for the smaller businesses we're looking at, it might not work as well. B2B can only help a few businesses at a time and connect them with a small number of interested buyers.	added and rephrased

No.	Identifier	Question or Comment	Evaluator Response
21	Page 105, paragraph 228, 5th bullet point	<p>Re: "...and some of them are not SMEs."</p> <p>To be checked again if there are companies which are not SMEs by definition. We need to be precise with the definition/interpretations, in particular what we count: permanent employees only, or, include also seasonal workers.</p>	<p>those 3 words are removed. There were a couple of companies that mentioned in the online survey that they have more than 250 employees. But I agree, the question must have been clearer - do we mean including seasonal employees or not. However, the EU definition also has a criterion for turnover "...annual turnover not exceeding 50 million euro, and/or an annual balance sheet total not exceeding 43 million euro..." As far as I know the project does not have info on that</p>

Annex 2: Terms of Reference

Context

1. The International Trade Centre (ITC) is responsible for the business aspects of trade development, as the joint technical cooperation agency of the United Nations (UN) and the World Trade Organization (WTO). The objective of ITC is to enhance inclusive and sustainable growth and development through trade and international business development for micro, small, and medium-sized enterprises (MSMEs) in developing countries, especially least developed countries (LDCs), and countries with economies in transition, through increased business capacities of those enterprises to trade and through a conducive business environment and strengthened institutional ecosystems for those enterprises. ITC contributes to the Sustainable Development Goals (SDGs) through its support to MSME international competitiveness for inclusive and sustainable growth through value addition, trade, investment, and global partnerships.
2. Phase II (2021-2024) of the project "Linking Ukrainian SMEs in the Fruits and Vegetables Sector to Global and Domestic Markets and Value Chains" started on 1 April 2021. The project is implemented by ITC with the aim to maximize the impact of the results already achieved during Phase I (2016-2021) and is funded by the Swedish Embassy in Ukraine. The total project budget is SEK 20,003,805 (approx. USD 2,348,140).

Project Background

Objectives of the project – Phase II

3. The project aims to maximize the impact of the results achieved in Phase I as well as (a) widen the geographical coverage by including additional regions; and (b) include the nuts product group and the wine sector. More competitive enterprises in these sectors contribute to achieving targets linked to the 2030 Agenda, particularly related to SDG 8 "promoting sustained, inclusive and sustainable economic growth, full and productive employment", SDG 12 concerning "responsible consumption and production", SDG 9 "industry, innovation and infrastructure", and SDG 5 "gender equality".
4. To achieve its long-term objective, the project foresees to assist MSMEs from the fruit and vegetable sector (including nuts) to produce goods as per market requirements, linking pilot MSMEs to target markets, particularly within the EU as well as to improve the capacities of BSOs to provide quality services to MSMEs. The project also aims to provide support to the wine sector with a focus on quality and production, helping sector representatives to take a strategic approach toward sector's development.

Project Background

5. A 2018 evaluation of the project found the project as relevant and aligned with country priorities. It also highlighted that "The underdeveloped institutional framework, seasonality of the fruit and vegetables business, overall absorption capacity and overall mistrust among stakeholders, requires more time and efforts to gain the scale and intensity as it was initially envisaged." The project will prepare an update of the implementation of the recommendations from the midterm self-evaluation of the Phase I project, to report the status of implementation as at October 2022. Phase II of the project takes into account lessons learned during Phase I as well as other ITC past and ongoing activities in the country, feedback from national stakeholders and demand expressed by the beneficiaries including private business, regional authorities, and sectoral BSOs.
6. Inclusion of the nuts product group and the wine sector was done in response to the request from potential beneficiaries and with consideration of several supportive factors. For the nuts product group, the timing is highly relevant as the industry transforms from household orchards to commercial orchards and the latter will be harvested in the nearest years. Therefore, it is essential to support commercial producers with establishing market linkages. The wine sector development in Ukraine is gaining momentum and needs a structural approach to sectoral development to contribute to the benefit of its players, in particular growers, as well as to address quality aspects respecting fair trade principles.
7. Both the nuts product group and the wine sector belong to labor-intensive value chains and provide significant potential for social and economic inclusion for Ukrainian citizens, including youth, women, and poor rural population. This is especially important given limited earning opportunities in the target regions.
8. Those SMEs that already benefitted from the assistance during the current phase will continue benefitting from activities aimed at sustaining their presence in the new markets, reinforcing business connections, and scaling up export sales.

Project Results Chain

9. **Impact** - Contribute to enhanced competitiveness and sustained export growth of the Ukrainian SMEs in the fruits, vegetables, nuts, and wine sectors: Agriculture and agribusiness represent a significant share of the Ukrainian economy, with 19% of GDP and USD 18.6 billion in export value in 2018 (39% of all country's exports). Advancement of sectors with a high potential for value-added products would create value chains with higher value-added and with backward and forward linkages. Phase II will also contribute to job creation; economic empowerment of women; and minimization of the environmental footprint by introducing principles of sustainable production practices and standards.
10. **Outcome** - Enhanced competitiveness and internationalization of SMEs from the selected sectors as well as the enablement of BSOs to provide relevant services to enterprises: This is meant to be achieved by assisting SMEs from

the fruit and vegetable sector (including nuts) to produce goods as per market requirements, linking pilot SMEs to target markets, particularly within the EU as well as to improve the capacities of BSOs to provide quality services to SMEs. The project intends also to provide support to the wine sector with a focus on quality and production, helping sector representative to take a strategic approach toward sector's development. For the producers of fruits, vegetables and nuts the project sets targets such as increase in export sales and increase in number of SMEs that transacted international business. For a wider group of producers, including the wine sector it is envisaged to improve business operations leading to the increased SMEs' international competitiveness. To address the prevalence of traditional gender stereotypes in Ukraine, the project intends to design a set of multi-media products – such as video interviews with women entrepreneurs – to encourage Ukrainian women to enter a career in international trade. There are few women associations like Council of Women-Farmers (Ukraine), Women in Business (Vinnitsa), Women's Committee at Kherson Regional Chamber of Commerce and Industry which can be involved in awareness raising, capacity building and networking activities to build effective regional cooperation between the relevant stakeholders to advance gender equality. To achieve the outcome of Phase II the project is structured around four outputs, discussed below.

11. **Output 1 - Roadmap updated and/or developed for selected value chains:** It is planned to update roadmaps for fruits and vegetables. The roadmap for nuts is currently being developed by the project. The roadmap for the wine sector will be designed using the value chain approach and priorities set in cooperation with relevant stakeholders and producers. It will allow to identify trade-related constraints faced by SMEs, gaps in BSO services, and to develop measures to boost the competitiveness of the sector. The project is meant to closely engage the stakeholders and local authorities in the strategy formulation process to **develop local capacities to formulate sound strategies and policies** derived from market perspectives. The close interaction with the private sector representatives and relevant expertise will contribute to a better understanding of the private sector's needs and create an environment that allows challenges to be discussed openly and priorities set in a consultative manner. The expected results of Output 1 will be the number roadmaps/strategies developed/updated and endorsed by stakeholders, as well as the increased capacity of relevant stakeholders and local authorities to understand and set strategic priorities for the development of the sectors concerned.
12. **Output 2 - Capacities of SMEs strengthened to improve their international competitiveness:** The project is meant to assist selected SMEs from the selected sectors to reinforce and enlarge their presence in the market and increase exports. For all product groups, including wine, the focus is on improving the capacity of SMEs to meet EU market requirements (mandatory and voluntary) including food safety, environmental management, and sustainability standards. The project intends to enhance SME capacities through awareness building, training, advisory services, and study tours. The scope includes building competencies in growing, harvesting, post-harvesting, packaging, logistics, marketing and sales, branding, CSR, as well as in business planning and management. It is expected that because of the assistance delivered through training and advisory services beneficiary enterprises/producers will get a better understanding of the market requirements, implement changes to improve their international competitiveness, introduce quality standards as well as adjust products to the needs of the target markets.
13. **Output 3 - Capacities of sectoral BSOs strengthened to provide SMEs with relevant business support services:** The project intends also to continue to enhance BSOs capacities, enlarge their service offerings to SMEs and develop operational and managerial performance. The scope of BSOs capacity building is meant to cover supply chain management, quality assurance and certification, trade intelligence, market analysis, and research, sales, export strategy. To ensure sustainability, the project will anchor knowledge sharing platforms within partner BSOs, help them to integrate into international networks, and establish mechanisms for cooperation. BSOs will be assisted in collecting and using the knowledge gained from project seminars and trainings to anchor this knowledge at the national level and ensure general dissemination within the country. BSOs will be entrusted with leadership of event organization such as trade fair participation and matchmaking events. After successful joint organization of first events, it is foreseen that the projects will take a step back and will act in the background supporting the BSOs in case assistance is required. Thus, BSOs will learn by doing while receiving full visibility of the action. BSOs will be also backstopped in their fund-raising efforts throughout the project's lifecycle, by training and helping them to develop fund-raising strategies. It is expected that at the end of the project at least six partner BSOs will improve/develop new service portfolio and develop operational capacities; sectoral SMEs will appreciate and value the services and will be willing to pay for them; knowledge-sharing platforms will be established and better coordination among BSOs will be ensured.
14. **Output 4 - Market linkages created for SMEs from fruits, vegetables, and nuts sectors to expand their sales domestically and internationally (in particular, with a focus on the EU market):** The major focus of the project is meant to assist companies to establish market linkages leading to tangible results. Beneficiary SMEs from the fruits and vegetables sector will continue to be connected to target export markets and linked with buyers, thus ensuring their solid presence in the foreign markets, internationalization, and sustainable business generation. For the new product group - nuts the project will initially focus on identifying target markets and preparing beneficiary SMEs for the interaction with buyers and for participation in matching activities, i.e., trade fairs, meetings with buyers, etc. As a result, it is expected that SMEs will be ready for matching events and for successful participation in trade fairs; and will establish new contacts with potential for business transactions.
15. With reference to the logical framework (see attached), it should be noted that all targets are set for the entire project duration. Regarding the first outcome indicator (number of SMEs reporting improved international competitiveness), this refers to the number of SMEs reporting changes in their business practices because of ITC trainings and advisory services. Regarding the second outcome indicator, the indicator was fine-tuned after the project's inception phase when the structure of the target sectors was analyzed. Regarding the third outcome indicator, this refers to the number of SMEs transacting sales or purchases with a foreign firm because of ITC support. Regarding outputs 2 and 3, priority capacity building areas for the SMEs and BSOs were defined in the roadmaps based on value chain analysis.

Project Approach and Management

16. In terms of coherence, the project is meant to be aligned with the strategic orientation of the [Export Strategy of Ukraine \("road map" of strategic trade development\) for 2017-2021](#) that the government developed with ITC's support. This strategy's objectives included, among others, the creation of favorable conditions for business, development of business support services as well as the transition from exporting raw materials to exporting value-added goods. The project is also aligned with the UNCDF of Ukraine, specifically in the context of the Pillar 1 of the ["Government of Ukraine – United Nations Partnership Framework 2018-2022"](#) that focuses on sustainable economic growth, environment and employment.
17. Phase II was developed as a result of a direct request from beneficiaries as well as local stakeholders including regional governments and relevant sector associations. At the planning and operations level, the project aims to discuss and tailor all interventions with beneficiaries including SMEs, BSOs, and public sector stakeholders, following the same demand-driven approach during implementation.
18. Local ownership on the part of enterprises and BSOs is ensured through cost-sharing of the services provided by the project. Project activities are delivered by a National Project Manager (NPM) and a team of national consultants and local service providers.
19. At the ITC HQ level, a Project Manager is responsible for the overall management of the project and implementation of project activities at the field level, including the supervision of the project office in Ukraine and financial project monitoring and reporting of results.
20. At the project oversight and guidance level, the Project Steering Committee (PSC) Ukrainian members are involved in project decision-making, monitoring of results, and implementation of activities. The PSC gathers the donor (the Swedish embassy in Ukraine), the implementing agency (ITC), the regional authorities, representatives of responsible ministries and the private sector (chambers of commerce and industry, and other key partners and stakeholders).
21. The main rationale of the above-described inclusive approach and participatory management is to ensure a maximum level of sustainability of the effects of the project and their ownership by the local business eco-system (enterprises and institutions). To that end, the project uses local service providers/ national consultants to perform most trainings and advisory services to enterprises, so that after project completion, local expertise and knowledge will provide continuous backstopping and coaching to SMEs, including to those that will not be directly reached through the project.

Project Beneficiaries

22. Direct project beneficiaries include MSME/producers of defined sectors, BSOs (including sectoral BSOs), local authorities and other government institutions. End beneficiaries are the Ukrainian people, who will benefit from the social and economic impact created by the increased international sector competitiveness, manifested primarily through jobs and income generated by these sectors.
23. **MSME/Producers:** Although results achieved during Phase I were promising, the number of enterprises/producers ready to export were relatively low in absolute terms. The share of processing enterprises is unprecedentedly low compared to other countries/regions – around 17 small enterprises were established and function in six regions (Dnipropetrovsk, Kherson, Mykolayiv, Odessa, Vinnitsa and Zaporizhzhya) starting from 2015, with maximum number of employees of up to 100. Only a small fraction of SMEs understand markets requirements and are capable to meet them.
24. **BSOs:** The institutional landscape in Ukraine, in the target regions, is fragmented with limited sectoral associations and low capacity of BSOs to absorb and disseminate knowledge. Only a handful of BSOs in the target regions are equipped to assist companies in trade development. The capacities to conduct research and analysis, produce studies and reports, despite a positive tendency, remain limited. A newly established State Institution Export Promotion Office has limited capacities and low expertise to meet the demands of MSME/producers. BSOs face challenges such as: inadequate capacity to deal with more complex demands of companies looking to export to developed markets; limited capacities to promote and deliver quality services; weak sustainability; limited geographical coverage; lack of trade and market-specific knowledge and specialization (in particular for the EU and other highly regulated markets as until recently BSOs were not required to provide this information); lack of appropriate tools to gather and disseminate trade intelligence; and lack of coordination and limited networking expertise. In addition, SMEs are often unable to pay for such services.
25. **Government:** The practical support from local administrations to the MSME/producers' groups is still inadequate and negligible due to a lack of resources and expertise.

Project Geographical Coverage

26. The geographic coverage at the onset of **Phase I** included three regions (Kherson, Mykolayiv, and Odesa). From June 2019 to April 2021 the coverage of Phase I expanded to include three more regions (Dnipropetrovsk, Zaporizhzhya, and Vinnitsa). These six regions were also covered at the onset of **Phase II** of the project, and in July 2022 the project expanded its activities to all regions of Ukraine.

Project Lessons learned from Phase I

27. At the end of Phase I, the project was working with 15 BSOs, including regional chambers of commerce and industry and associations. At the Government level, the project helped local authorities (e.g., regional administrations) and the Export Promotion Office of Ukraine to improve the dialogue with the private sector and better understand their needs, as well as to improve awareness of global trends in the F&V sector. During Phase II, to further advance export potential to developed markets, the project aims at continuing generating a high level of commitment and willingness to

collaborate at the three levels of intervention (SMEs, BSOs and Government) to ensure the establishment of a conducive business environment in the long term (impact).

28. According to project management, the programming of the new phase was done with consideration of the experience gained during Phase I and more specifically, in view of the recommendations of the midterm evaluation of Phase I conducted in March-April 2018, which indicated the following:

The active involvement of local BSOs and national consultants in the implementation of the project activities contributes to enhancing local capacities, ensuring local ownership and sustainability of project results.

Building trust between local administrations, the private sector is an important contributor for achieving positive changes.

Companies achieve better results when they are strongly committed and ready to invest time and money in long term relations with foreign markets.

Continue and further intensify the presence during trade fairs and organize continuous buyer-seller meetings.

Market linkage events are seen by businesses as the most fruitful activity organized by the project.

Intensifying connections with national institutions and government.

Special efforts should be put on women since the share of companies, when are women-owned / -controlled or with a majority of women employed, remains small in the target sectors.

Longer term and consistent actions are required to strengthen BSOs, increase their role and ensure appreciation of their services by SMEs.

Purpose of the Midterm Evaluation

29. As stated in the project document signed by the Embassy of Sweden to Ukraine and ITC in April 2021, a midterm evaluation will be conducted after one and a half years of the project's initiation to evaluate project implementation progress against planned activities and to make relevant adjustments if necessary. The evaluation will cover all project activities, results achieved, and lessons learned of the project at midterm. This is intended to guide the project's activities during the second half of its life cycle to maximize its chances of fulfilling its objectives in the **new context created by the war in Ukraine**.
30. The evaluation will assess the progress achieved by the project towards the objectives that were set at its design stage (accountability perspective) and the learning elements obtained through the project's experience (learning perspective). Lessons learned will be used to inform future/new joint project activities in their alignment with the [Strategy for Sweden's reform cooperation with Eastern Europe for 2021-2027](#).
31. The evaluation will follow a forward-looking approach. It will assess the project repositioning in striving and adapting to continuously maximize scale and outreach and the sustainability of results within the current invasion context. This will also be with a view of enhancing the ability of ITC to better support pro-poor market systems developments for agricultural sectors in Ukraine by supporting these sectors in pivoting/reconnecting to international value chains.
32. The evaluation will pay particular attention to the soundness of indicators and targets, the relevance of baselines established at the inception of the project to assess beneficiaries' conditions and the means of verification used to gather and validate results. Besides, it will examine due implementation of results-based management methods throughout the project and, in alignment to those good practices and disciplines, the ability of project management for real time management and sound decision-making (including at the local level). Note that, according to a [2018 evaluation of Sida's market systems development approach](#), Sida has mainstreamed an Inclusive Market Systems Development approach across its portfolio, encouraging all contributions to consider these aspects of sustainability. It emphasizes that as well as being a tool for accountability, RBM should be used to inform ongoing learning and adaptation (e.g. by applying the [DCED Standard for Results Measurement](#)). The DCED Standard is a framework that aids projects to clearly state the hypothesis and set indicators that are monitored regularly to demonstrate whether events are going according to plan.
33. **Risk Management:** Considering the risks that affect the full realization of project objectives, the assessment of the project risk mitigation approach will be of utter importance in this evaluation. Specifically, the evaluation will examine the relevance of the project's approach risk management plan and the effectiveness and efficiency of project management and partners in implementing and adapting it to evolving challenges. Particular attention will be paid in this section to the current war in Ukraine and the impact that this is having and will have on project outcomes. Where possible, adaptations, mitigations, and exit strategies will be proposed, based on different evaluable scenarios.
34. **Recommendations:** The evaluation will examine the project's responsiveness to incorporating lessons learned and recommendations of the midterm evaluation of the Phase I project. Key findings and recommendations shall focus on delineating the intervention's achievements and gaps. The midterm evaluation will identify what works and what does not work in terms of activities, outputs, and potential outcomes. It will set out to offer the project funder (the Swedish Embassy in Ukraine) and other key stakeholders, strategic and operational recommendations on the future direction of the project as well as an independent and objective perspective on a possible enlargement of its portfolio, which has been deemed as necessary to overcome the multiple and new external challenges that are being faced by the beneficiary sectors.

Target audience and users of the Midterm Evaluation

35. The intended users of this evaluation include project management teams (at HQ and in Ukraine), the funder (the Swedish Embassy in Ukraine), the Project Steering Committee (PSC), as well as ITC management and staff, and the wider community of ITC stakeholders interested in learning more about ITC interventions or about the project under evaluation.

Scope

36. The scope of the evaluation will include all the project activities, results achieved, and lessons learned from the project at midterm, and will cover the period from 1 April 2021 up to and including 31 March 2023.

Evaluation questions and criteria

37. The evaluation will use the OECD-DAC evaluation criteria, namely: relevance, coherence, effectiveness, efficiency, potential impact, and sustainability. Cross-cutting issues including gender equality and human rights, youth engagement, green growth, and social responsibility will also be assessed. The evaluation questions formulated below are indicative and are intended to be elaborated in the evaluation's inception report.
38. Overall, the evaluation needs to take into consideration the disproportionately negative impact the COVID 19 pandemic as well as political- and security-related instability have had and are having on the concerned agricultural sectors and Ukrainian regions as well as the war with Russia.

Relevance

39. The evaluation will assess the extent to which the project objectives and design respond to the evolving needs of Ukraine and targeted beneficiaries' (BSOs and MSMEs), the needs, policies, and priorities of the funder (the Swedish Embassy in Ukraine), and the extent to which they are relevant to ITC's mission and strategic objectives. Note that "respond to" means that the objective and design of the project are sensitive to the economic, environmental, equity, social, political economy, and capacity conditions in the country. The relevance of the project will also examine if the project continues to respond these needs as circumstances have changed. Beneficiaries are defined as the individuals, groups, or organizations, whether targeted or not, that benefit directly or indirectly, from the project. Other terms, such as rights holders or affected people, may also be used. Relevance also includes an assessment of the responsiveness to changes and/or requests from national counterparts and shifts caused by external factors in evolving country, regional and sector contexts. Key questions may include, inter alia:

What are the strengths and weaknesses related to project design, in particular the project's Logical Framework, Theory of Change (ToC) and the further development of it into operational results chains for the achievement of inclusive and sustainable trade? What can be learned to better align the project objectives and ToC to the Strategy for Sweden's reform cooperation with Eastern Europe for 2021-2027, in particular elements related to inclusive economic development?

What are the key business environment constraints faced by the project, their evolution, and the ability of project management to engage on these? What was the quality of the project's analysis in identifying the issues that prevent the target groups from benefiting from or engaging with the market system? Have the analyses and ongoing monitoring influenced decision-making and shaped activities? (Particular attention to be devoted to the experience / performance of the project in contributing to strengthened conditions for free, fair, and sustainable trade.)

What is the relevance of the project's approach risk management plan within the current context?

To what extent did the midterm evaluation of Phase I, including its lessons learned and recommendations, inform the design of the Phase II project?

Coherence

40. The evaluation will assess the compatibility of the project with other interventions in Ukraine, with the same sectors, and within ITC. The evaluation will assess the extent to which other interventions support or undermine the project, including internal coherence and external coherence, as well as complementarity, harmonization, and coordination with others, and the extent to which, the project is adding value while avoiding duplication of effort. In addition, considering the COVID-19 pandemic and the disruptions provoked by the war, increased coordination and coherence are required. Key questions include, inter alia:

Regarding internal coherence, what is the level of compliance of the project with the strategic objectives of ITC and the Swedish Embassy in Ukraine? What is the ability of project's management to establish synergies and interlinkages with relevant interventions of ITC and the Swedish Embassy in Ukraine?

Is the scope of the project in conformity with ITC core services and impact areas as set out in ITC's Strategic Plan 2022-2025? Are the project's core services' roles and synergies within ITC's matrix identified (design), and further developed into coordinated and well managed results chains (implementation)?

Regarding external coherence, is there evidence of inclusive development partnerships through the alignment to the Ukraine's own priorities and policies, and systems and processes. In relation to the interventions of other development partners, what is the extent to which ITC's project is market building or market distorting in providing the support?

In terms of resource mobilization and use, is there evidence of partnerships with entities with complementary strengths to coordinate resources for joint objectives?

What other synergies or possible overlaps have been observed, or forward-looking synergies could be developed in the future, with other related – most notably UN managed – programmes and capacities? What are the strengths of

partnerships within the UN family (engagement with UN Resident Coordinator offices [RCO]; participation in the UNSDCF and CCA, in joint programming and M&E) as well as potentially with WTO and other partners?

Effectiveness

41. The evaluation will assess the extent to which the project is achieving, or is expected to achieve, its objectives and its results, considering their relative importance. Key questions may include, inter alia:

How well has the project taken advantage of the lessons learned and recommendations of the midterm evaluation of Phase I to optimize its effectiveness?

How performant is the project's monitoring system? To what extent has the project achieved, or is expected to achieve, its objectives, and its attributable results along the causal pathway, including any differential results across sectors and regions in the country? Can the results be distributed across different groups, and do the results surpass the intended objectives of the project? (This is in line with the UN leave no-one behind policy. It is meant to encourage the evaluation to "examine equity issues and results for groups that have been marginalized, while not assuming that equity is an objective of the intervention". (OECD/DAC (2019)

What is the effectiveness and efficiency of project management and partners in implementing and adapting the project to evolving challenges? Under the current circumstances of the war in Ukraine, what is its impact on the project towards reaching its outcomes? What possible adaptations and risk mitigations can be proposed, based on different evaluable scenarios?

To what extent has the project contributed to improved competitiveness and internationalization of MSMEs and the performance of BSOs' to provide relevant services to enterprises? (Particular attention to be devoted to the project's potential to promote stronger competitive ties with the EU.) Is the project on track to meet the targets set out in the logical framework? Is it falling behind? What are the implications for continuation?

How is the project analyzing and addressing, where needed, access to finance bottlenecks for partner MSMEs (to build or sustain exports)? Similarly, regarding partnerships or workstreams that have been closed earlier than expected, what can be learned from these experiences for the future?

Efficiency

42. The evaluation will assess the extent to which the project delivers, or is likely to deliver, in an economic and timely way, as well as its capacity to adapt to changing circumstances. Key questions may include, inter alia:

Are the project implementation mechanisms appropriate to achieve planned outputs and contribute to project outcomes? Are the project approach and indicators still valid, or are improvements necessary?

Do feasible alternatives exist that can deliver similar results with the same resource? (Note that before cost-effectiveness comparisons can be made, alternatives must be identified that are genuinely feasible and comparable in terms of quality and results.)

In comparison to other work in similar sectors, how does the project's impact achieved so far compare for the amount of money spent? How does the cost for key inputs, including the use of consultants, relate to appropriate comparators? Is the number, expertise, and structure of staffing and the relationship to ITC and the national and HQ levels adequate?

Are the inputs adequate for achieving the planned results and intended outcome? Is the spending in line with the project budget? To what extent has the project been adapting its 'value offer' over time? Why/why not, and how?

Has the project encountered any delays and was the planning revised accordingly?

Potential Impact

43. The evaluation will assess the extent to which the project has generated, or is likely to generate, significant positive or negative, intended, or unintended, higher-level effects.

Is the project likely to achieve its planned objectives upon completion, in particular in terms of expected benefits for ultimate beneficiaries (impact-level)? What is the likelihood that the project will contribute to the broader and longer-term national development impact? What is the potential impact of the project locally?

What is the likelihood that the project will contribute towards international commitments set out in the 2030 Agenda, particularly SDG 5 "gender equality", SDG 8 "promoting sustained, inclusive and sustainable economic growth, full and productive employment", SDG 9 "industry, innovation and infrastructure", and SDG 12 "responsible consumption and production"?

At midterm, can any unintended positive or negative effects already be observed as a consequence of the project's interventions?

What is the most and least valuable type of support offered by the project? Why?

Sustainability

44. The evaluation will assess the extent to which the net benefits of the project are likely to continue beyond the phase of ITC's direct support. This will also include an assessment of the likelihood that actual and anticipated results will be resilient to risks beyond the project's lifespan.

How effective has the project been in establishing national ownership? How have in-country stakeholders, including the private sector been involved in project design, inception and implementation?

Are the project results likely to be durable and anchored in national institutions? Are government and related national institutions likely to maintain the project financially once external funding ends? Will access to the benefits generated by the intervention be affordable for the beneficiaries over the long term? Are national partners able, willing, and committed to continue building on the systems enhanced by the project?

Has the project prepared for an exit plan to ensure a proper hand-over to the national government and institutions after the project ends? Under the current circumstances of the war in Ukraine, what possible exit strategies can be proposed, based on different evaluable scenarios?

Does the project increase resilience to shocks and pressure (by addressing specific dimensions of fragility and their root causes)? How is the project thinking about, and supporting, resilience (including the ability of newly exporting MSMEs to maintain/grow their exports)?

How does the project measure progress towards sustainability and scale, achievements and lessons learned to date?

What options exist for possible support to MSMEs to facilitate access to finance (investor engagement, accessing working capital, etc.)?

- How will the impacts and the mechanisms to achieve these impacts continue after funding for the project has ended so that more and more people will continue to benefit from the intervention? Note that according to a [2018 evaluation of Sida's market systems development approach](#), Sida has mainstreamed an Inclusive Market Systems Development approach across its portfolio, encouraging all contributions to consider these aspects of sustainability. It emphasizes that as well as being a tool for accountability, RBM should be used to inform ongoing learning and adaptation (e.g. by applying the [DCED Standard for Results Measurement](#)). The DCED Standard is a framework that aids projects to clearly state the hypothesis and set indicators that are monitored regularly to demonstrate whether events are going according to plan.

Cross-Cutting Issues

- To what extent does the project contribute towards cross-cutting issues including human rights and gender equality (human rights, democracy, the rule of law and gender equality); inclusion of youth (peaceful and inclusive societies); green growth (environmentally and climate-resilient sustainable development and sustainable use of natural resources); and social responsibility (inclusive and economic development)? Note that the objectives set out in the [Strategy for Sweden's reform cooperation with Eastern Europe for 2021–2027](#) include human rights, democracy, the rule of law and gender equality; peaceful and inclusive societies; environmentally and climate-resilient sustainable development and sustainable use of natural resources; and inclusive economic development. Development markers set out in [ITC's Mainstreaming sustainable and inclusive trade Guidelines](#) for ITC projects include gender equality; inclusion of youth; green growth, and social responsibility – including human rights.
- Does the project need to be adjusted in order to contribute to these issues?

Evaluation team and management

45. The evaluation will be commissioned and managed by ITC's Independent Evaluation Office (IEU). The unit will hire an external consultant (either an individual or a team), which will be managed by an ITC evaluation officer. The consultant is to be selected mainly based on expertise in the areas of evaluation, trade and development, and knowledge of the fruit and vegetable sector. The consultant must sign a non-disclosure agreement to avoid possible conflicts of interest.

ITC Independent Evaluation Unit

46. The ITC Independent Evaluation Unit (IEU) will supervise and monitor the progress of the midterm evaluation. The evaluation will be managed, and quality controlled by the IEU. The role of the IEU will be to provide guidance and oversee the evaluation process. The duties of the IEU will be to:

Manage the evaluation, including the supervising the evaluation process; involving stakeholders in the process; ensuring the quality of deliverables; and conducting regular consultations and consensus-building activities;

Provide technical comments to the draft inception report and endorse the final inception report; ensure the draft inception report has determined the key evaluation questions the evaluation should answer;

Circulate the draft inception report to key programme stakeholders (i.e., Project Management Team, funders, etc.); collect feedback and comments for review and onward submission to the consultant(s);

Provide technical comments to the draft evaluation report;

Manage the process of preparing the evaluation report, including the circulation of the draft report and collecting comments, and ensuring follow-up;

Quality control the final evaluation report; send the final evaluation report to key stakeholders;

Organize a stakeholder meeting to discuss the evaluation results; and

Ensure the management response is submitted and ensure proper follow-up on the recommendations and dissemination of results and lessons learned.

The Project Management Team

47. The Project Management Team will:

- Support implementation of the evaluation through collecting documentation and making it available to the IEU and/or directly to the consultant(s);
- Facilitate stakeholder meetings, including the provision of introductions required for the consultant(s) to carry out meetings and interviews;
- Provide administrative, logistical (including travel arrangements), and practical support to the consultant(s) when required.
- Liaise with the United Nations Department for Safety and Security (UNDSS) in Ukraine for security clearance purposes;
- Participate in the consultations during the evaluation process and provide feedback, comments and clarify expectations on accountability and learning issues;
- Be available to take part in interviews;
- Provide comments and inputs to the draft TOR; the draft inception report; and the draft evaluation report;
- Ensure proper stakeholder involvement in the entire evaluation process;
- Provide a management response to the midterm evaluation;
- Ensure and/or support the implementation of the accepted or partially accepted recommendations; and
- Support the dissemination of the evaluation through consulting with the PSC, and other country stakeholders on the evaluation findings and conclusions.

Swedish Embassy in Ukraine

- 48. The Swedish Embassy in Ukraine will:
 - Be available to take part in interviews; and
 - Provide comments and inputs to the draft TOR; the draft inception report; and the draft evaluation report.

The Project Steering Committee (PSC)

- 49. The PSC will:
 - Be available to take part in interviews; and
 - Provide comments to the draft evaluation report.

Methodology

- 50. The midterm evaluation is expected to follow the principles outlined in the [ITC Evaluation Guidelines](#). Furthermore, it shall be performed in line with the [Norms and Standards for Evaluation](#), integrating [Human Rights and Gender Equality](#), and respecting the [Ethical Guidelines for Evaluation](#) published by the United Nations Evaluation Group (UNEG).
- 51. According to UNEG guidelines, evaluations should be carried out in a participatory and ethical manner. The evaluation should take account of cultural differences, local customs, religious practices, gender roles, and age throughout the planning, implementation, and reporting of the evaluation. UNEG guidance also specifies that the chosen methodology for an evaluation should explicitly address issues of gender and under-represented groups and be in line with the UN system's commitment to the human rights-based approach. The evaluation will involve four (4) phases through the evaluation process: (1) Desk Review and Diagnostic Phase, (2) Data Collection and Analysis Phase, (3) Reporting Phase, (4) Management Response Phase. The sequencing of the evaluation and roles and responsibilities are outlined below.
- 52. The evaluation will involve four (4) phases through the evaluation process: (1) Desk Review and Diagnostic Phase, (2) Data Collection and Analysis Phase, (3) Reporting Phase, (4) Management Response Phase. The sequencing of the evaluation and roles and responsibilities are outlined below.

Desk Review and Diagnostic Phase

- 53. The selected consultant(s) review the relevant ITC policies, strategies, programme, and project documents, and conducts interviews (face to face or virtual) with ITC programme and project managers.
- 54. The selected consultant(s) will prepare an inception report. The inception report should clarify the evaluation approach, describe the project theory of change (ToC) and corresponding results chain, evaluation questions, evaluation matrix, data collection methods and instruments, major analysis and findings based on desk review, evaluation framework, key issues to be assessed, data gaps to be addressed during evaluation, and timeline of the evaluation. Note that an evaluation matrix is an organizing tool to help plan for the conduct of an evaluation. It is prepared during the inception phase of the evaluation, and is then used throughout the data collection, analysis and report writing phases. The evaluation matrix forms the main analytical framework for the evaluation. It reflects the evaluation questions to be answered and helps to consider the most appropriate and feasible method to collect data for answering each question. It guides the analysis and ensures that all data collected is analysed, triangulated, and then used to answer the evaluation questions, leading to conclusions and recommendations.
- 55. The inception report is used to identify the most appropriate methodological approach for the evaluation, including mitigation measures should local data collection not be feasible. The inception report should also include an indicative evaluation communication and learning plan.

56. For this evaluation, it is important that the inception report includes an analysis of the new situation that is faced by the beneficiary sectors, and possible diagnostics with a forwarding looking perspective.

Data Collection and Analysis Phase

57. The selected consultant(s) will apply the evaluation methods agreed in the inception report, to answer the evaluation questions identified in the inception report and in the evaluation matrix, including triangulation of methods to ensure ideal coverage and assessment and the use of both quantitative and qualitative data collection methods. Ideally, data collection would include obtaining data, including data collected through interviews with beneficiaries and stakeholders. It should be noted that there will be a number of trade fairs taking place in 2023 that the project will be participating in with a collective stand of Ukrainian exporters.

58. The list of upcoming trade fairs to which the producers have been or will be invited to attend include:

Fruit Attraction 2023, October 2023, Madrid, Spain; and

Anuga 2023, 7-11 October 2023, Cologne, Germany.

59. If certain conditions (such as travel restrictions, local health situation, or political instability) preclude on-site data collection, alternative forms of data collection must be considered.

60. The evaluation will distil the findings that emerge from the data collected and the analysis will examine the project from a synthetic perspective assessing its relevance, coherence, effectiveness, efficiency, potential impact, potential sustainability, and cross-cutting issues into a single and coherent midterm evaluation report.

Reporting Phase

61. Following data collection and analysis, the selected consultant(s) will draft the midterm evaluation report. The draft should be shared with IEU for peer review and quality assurance. Thereafter, the IEU will share the revised draft with the programme and other key stakeholders and partners inviting comments. The comments will be acknowledged and addressed respectively by the selected consultant(s).

62. To ensure participation and ownership among key stakeholders, regular consultations will be conducted during the evaluation process. In concrete terms, this implies that key stakeholders (in particular the project team) will be consulted at the drafting stages of the (i) terms of reference, (ii) inception report, and (iii) evaluation report and will have the opportunity to provide comments. Moreover, it is envisaged to have a meeting with the project team to present and discuss the findings before the conclusion of the final draft of the evaluation report.

Management Response Phase

63. Upon completion of the evaluation, the project management will prepare a management response and related action plan addressing each of the recommendations. In agreement with ITC management, programme management, and other key stakeholders (e.g., funders), the IEU will be responsible for following up on the implementation of the evaluation recommendations and reporting the process of the implementation to ITC Senior Management Committee.

Timeline and deliverables

64. The evaluation is planned to be conducted in a timeframe of approximately six months, between June and December 2023. It should be noted that the estimated timeline is tentative; it is only to provide an indication as to the amount of time that should be expected for the evaluation process. If more or less time is required, it will be discussed between the consultant(s) and the IEU.

Deliverable 1 – Draft inception report

65. The consultant(s) completes an initial round of desk research and preliminary review of documentation to determine the evaluability of the programme, including initial interviews to determine the methodology.

66. The inception report is a strategic and technical analysis that paves the way for the evaluation process. It will build on and be coherent with the TOR of the midterm evaluation. It sets the context for the evaluation, particularly the conditions related to evaluability. The inception report defines what will be evaluated (evaluation questions and matrix) and how the process for conducting the evaluation will be deployed (evaluation methods, sources of data, and a workplan), and field visits (including a list of identified beneficiaries, with relevant contact details for interviewees and recipients of the questionnaire and focus group discussions, and interview schedules).

67. It will include an analysis of possible risks encountered during the evaluation process together with a mitigation plan and a strategy for communication/dissemination of the evaluation report.

68. The inception report will be based on the evaluation questions in the TOR, desk research, and early interviews. It will provide a complete and finalized set of evaluation questions with an indication of specific judgment criteria and indicators, as well as the relevant data collection sources and tools in an evaluation matrix. The inception report will address how the data is collected on each sector, and its analysis will be distilled and synthesized to evaluate the project and produce a single and coherent evaluation report.

69. The inception report will include a **contextual and diagnostic analysis covering each of the project sectors** that are benefiting from the project. This is important because of the current disruption caused by the war in Ukraine and as it should guide the forward perspective of the evaluation. Accordingly, this analysis will identify possible scenarios for further repurposing or even scaling up of the project to meet new realities and prospective needs in Ukraine's trade

situation. From an operational perspective, it will also be used to identify the most appropriate methodological approach for each sector, including mitigation measures should local data collection not be feasible.

70. The selected consultant will submit the draft inception report **one month after the contract has been signed**.

Deliverable 2 – Final inception report

71. The IEU will review the draft inception report to ensure its conformity with the TOR and quality requirements. Should these requirements not be met, the IEU will liaise directly with the consultant(s) to rectify any issues identified. The IEU circulates the draft inception report to all key stakeholders for comments and feedback. Comments and feedback are sent to the IEU, and the IEU will compile all comments and feedback and relay them to the consultant(s).
72. The consultant(s) answer questions, provides justifications, and/or incorporates changes into the draft inception report. At the end of this period, the consultant(s) submits the final inception report to the IEU, which will include the approved ToC, methodology, data collection instruments, and the complete analysis of data collection methods, for approval. The IEU will circulate the final inception report to all key stakeholders.

Deliverable 3 – Update and Validation Workshop

73. The consultant(s) carries out the evaluation and implements the agreed methodology as set out in the inception report. At the end of this period, the consultant(s) sends an update to the IEU on the collected findings and preliminary observations. In addition, the consultant(s) will provide a presentation to be discussed during a validation workshop, organized by the consultant(s). This workshop shall allow the consultant(s) to present and discuss preliminary findings, conclusions, and recommendations with key stakeholders.

Deliverable 4 – Draft Midterm Evaluation Report

74. Following the validation workshop, the consultant(s) completes the write-up of the draft midterm evaluation report, which will be the core product of the evaluation process. The draft midterm evaluation report should be relevant to decision-making needs, written in a concise, clear, and easily understandable language, and of high scientific quality.
75. The final report should highlight the purpose, scope, and limitation of the evaluation, and should contain an Executive Summary, a description of the applied methodology, evidence-based findings, conclusions, lessons learned, and recommendations directly derived from the evaluation findings and conclusions. The analysis should also highlight constraints, strengths on which to build, and opportunities for the project. Lessons learned should allow the users to know what is doable in the future and what should not have been part of the project, and guide future phases on how development cooperation work should look. **Particular attention to be devoted to lessons learned that could be useful to enhance project's coherence with the Swedish 2021-27 Strategy for Eastern Europe.**
76. The recommendations should give a forward-looking attention to needs as emerged through the Ukrainian war response and recovery planning, which in turn will guide activities in Ukraine of the ITC in its support to the development of agricultural value chain as well as the operational aspects of implementing the Swedish strategy mandate.
77. The report will be prepared in English and will preferably comprise not more than 40 pages, excluding the Executive Summary and annexes. The IEU will review the draft midterm evaluation report to ensure its conformity with the TOR, the inception report, and quality requirements. Should these requirements not be met, the IEU will liaise with the consultant(s) to rectify any issues identified. The IEU circulates the draft evaluation report to all key stakeholders for comments and feedback. Comments and feedback are sent to the IEU, and the IEU will compile all comments and feedback and relay them to the consultant(s).

Deliverable 5 – Final Midterm Evaluation Report, Audit Trail, and Evaluation Briefing

78. The consultant(s) will incorporate changes into the midterm evaluation report and provide answers to questions and justifications, and accounts for these in an Audit Trail. At the end of this period, the consultant(s) submits to the IEU the final midterm evaluation report, including the Audit Trail, and an Evaluation Briefing which may be comprised of a Communication Note or a Presentation for briefing purposes, or both. In the case of a Presentation, the presentation slides will be submitted to the IEU for future purposes.

Profile required for the consultant(s)

79. Ideally, the consultant(s) should comprise of a team that includes national experts from Ukraine and/or who possess background knowledge/expertise in Ukraine. The team should also strive for gender balance in its composition and should demonstrate experience in implementing evaluations remotely. Ideally, the evaluation team should combine a mix of competent team members (including evaluator(s) based in Ukraine) that fulfil the following pre-requisites, expertise, and experience:
80. The selection of a suitable consultant(s) will be based on these criteria:
- No previous engagement/involvement in the design and delivery of the project under evaluation;
 - At least 6 years of relevant evaluation experience, and proven relevant thematic experience
 - Demonstrated knowledge of and a strong record in designing and/or leading evaluations (including both qualitative and quantitative evaluation methods) of development projects/programmes within the past five years;
 - Technical capability to carry out the work required for Ukraine or conflict zones would be an asset;
 - Experience in leading evaluations with the UN and/or Sida and knowledge of the UN and/or Sida and their/its reporting system would be an asset;

- Technical competency in sustainable / inclusive trade development issues, and private sector development approaches;
- Experience and knowledge in evaluating agro sector and agro value chain / market systems development;
- Experience and knowledge in evaluating agricultural value chain development, particularly fruits and vegetables, nuts and wine sectors;
- In-country experience in Ukraine;
- Knowledge of other related local programmes/projects, and of associated local institutions and government structures in Ukraine where the project is being implemented will be an asset;
- Proficiency in English and excellent report writing skills, with the ability to write clear and concise analytical reports;
- Proficiency in Ukrainian and/or Russian;
- Good facilitation, presentation and analytical skills;
- Ability to communicate effectively with various stakeholders including government, funders, private sector, and other beneficiaries;
- Excellent organization and time management skills;
- Strong interpersonal skills, with the ability to work with people from different backgrounds to deliver quality products within short timeframe; and
- Ability to be flexible and responsive to changes and demands; and to be result-based and open to feedback.

Logical Framework

Objectives	Project indicators	Corporate indicators	Baseline	Targets	Means of verification	Risks and assumptions
Impact: Impact: The project will contribute to enhanced competitiveness and sustained export growth of Ukrainian SMEs in the fruits, vegetables, nuts and wine sectors.	- Increased exports of SMEs from selected sectors	GOAL 17: Revitalize the global partnership for sustainable development - TARGET 17.11: Support significantly increased exports of developing countries, doubling the LDCs' share of global exports by 2020	0	0.00	National statistics; Statistics from relevant ministries, associations and BSOs; Evaluation report.	Assumptions: <ul style="list-style-type: none"> - <input type="checkbox"/> Availability of sector disaggregated national statistics and data, including on women entrepreneurs, women and young workers - <input type="checkbox"/> Global recession and COVID -19 does not severely affect SMEs - <input type="checkbox"/> Major markets are not affected by negative economic development and COVID 19 - <input type="checkbox"/> Continued liberal trading regime and no move towards protectionism in the target markets - <input type="checkbox"/> Stable social, political & business environment in the country Risks: <ul style="list-style-type: none"> - 2. Economic and political crisis in the country - 4. Political and security instability, including the deterioration of the security situation in Southern Ukraine
	- Increased exports of SMEs from selected sectors to the EU	GOAL 8: Decent work and economic growth - TARGET 8.5: By 2030, achieve full and productive employment and decent work for all women and men, including for young people	0	0.00	National statistics; Statistics from relevant ministries, associations and BSOs; Evaluation report.	
	- Increased share of SMEs in the economy of Ukraine	N/A	0	0.00	National statistics; Statistics from relevant ministries, associations and BSOs; Evaluation report.	
Outcome: Outcome: Enhanced competitiveness and internationalization of SMEs from the fruits, vegetables, nuts and wine sectors	Number of SMEs reporting improved international competitiveness	C1: Number of MSMEs having made changes to their business operations for increased competitiveness as a result of ITC support	0	50.00	Pilot SMEs survey	Assumptions: <ul style="list-style-type: none"> - <input type="checkbox"/> Further spread of COVID-19 does not severely affect SMEs - <input type="checkbox"/> The Government of Ukraine remains committed to the transformation process of agriculture - <input type="checkbox"/> Southern Ukraine remains out of conflict zone - <input type="checkbox"/> National government partners remain committed - <input type="checkbox"/> BSOs have sufficient absorption capacities - <input type="checkbox"/> Interest and at least minimum capacity of industry associations to integrate the program into their service portfolio (BSOs willingness to change) - <input type="checkbox"/> Coordination and collaboration among BSOs - <input type="checkbox"/> Policy consensus to endorse strategy/ policy papers - <input type="checkbox"/> BSOs are committed, able and not biased in undertaking surveys among their clients/members - <input type="checkbox"/> BSOs are able to implement the performance improvement roadmap, including following the recommendations on service provision and fee structures - <input type="checkbox"/> Companies are able to pay for required services
	Number of SMEs reporting improved international competitiveness that are women owned/operated/controlled or with majority women employed	C2: Number of MSMEs led by women having made changes to their business operations for increased competitiveness as a result of ITC support	0	15.00	Pilot SMEs survey	
	Number of SMEs that have transacted international business	C3: Number of MSMEs having transacted international business, including national business transactions that are part of international or global value chains, as a result of ITC support	0	21.00	Consultant reports; Pilot SMEs survey	
	Number of SMEs that have transacted international business are women owned/operated/controlled or with majority women employed	C4: Number of MSMEs led by women having transacted international business, including national business transactions that are part of international or	0	7.00	Consultant reports; Pilot SMEs survey	

		global value chains, as a result of ITC support					<input type="checkbox"/> Enterprises are responsive, follow up on buyer solicitations and regularly report back to the project <input type="checkbox"/> Sufficient political and social stability Risks: - 10. Local government authorities are not committed and do not support project implementation - 3. Changes at the government level affecting the content of the project - 9. Lack of adequate donor coordination resulting in overlaps of TRTA provided and duplication of ITC technical assistance by other donors - 7. Lack of commitment and collaboration and/or Insufficient absorption capacity of beneficiary BSOs and/or SMEs.
	Increase in export value of selected (pilot) SMEs as compared to the baseline (percentage)	N/A	0	30.00	Consultant reports; Pilot SMEs survey		
	Number of new markets accessed by SMEs	N/A	0	4.00	Consultant reports; Pilot SMEs survey		
	Number of BSOs that have improved services and/or operational performance	N/A	0	6.00	- Survey among BSOs		
Output: Output: Output 1: Roadmap updated and/or developed for selected value chains.	Number of value chains analysed	Number of advisory services provided	0	2.00	Value chain analysis report for the wine sector; Project reports		Assumptions: <input type="checkbox"/> National partners are committed <input type="checkbox"/> Local governments support project implementation <input type="checkbox"/> Trust is built among stakeholders <input type="checkbox"/> Pilot SMEs are willing to share sensitive information <input type="checkbox"/> There is sufficient interest in selected areas at intervention <input type="checkbox"/> SMEs are interested in collaboration Risks: - 11. Trust is not built among stakeholders
	Number of roadmaps (intervention strategies) developed/updated	Number of advisory services provided	0	2.00	Roadmaps/ intervention strategies endorsed by regional stakeholders and published; Project reports		
Output: Output: Output 2: Capacities of SMEs strengthened to improve international competitiveness	Number of training courses, seminars and workshops conducted	Number of group trainings	0	14.00	Project reports		Assumptions: <input type="checkbox"/> SMEs are open to changing existing practices and committed to implementing project recommendations <input type="checkbox"/> SMEs are ready to cost share Risks: - 5. SMEs are not open to changing existing practices, or are not committed to implementing project recommendations - 6. SMEs are not ready to increase cost sharing proportion
	Number of advisory services provided (by specific technical area)	Number of advisory services provided	0	12.00	Project reports		
	Number of SMEs trained	N/A	0	70.00	Project reports; Post-event reports/training evaluation; Consultant reports		
	Number of SMEs trained that are women owned/operated/controlled or with majority women employed	N/A	0	20.00	Project reports; Post-event reports/training evaluation; Consultant reports		
	Number of participants in workshops	Number of participants to group trainings	0	400.00	Project reports; post-event reports/training evaluation; Consultant reports		
	Number of women participants in the workshops	Number of female participants to group trainings	0	60.00	Project reports; post-event reports/training evaluation; Consultant reports		

Output: Output: Output 3: Capacities of sectoral BSOs strengthened to provide SMEs with relevant business support services	Number of training courses, seminars and workshops conducted	Number of group trainings	0	6.00	Project reports	Assumptions: - <input type="checkbox"/> BSOs are open to collaborating with the project - <input type="checkbox"/> BSOs are willing to implement project recommendations and introduce new/improved services to their clients Risks: - 7. Lack of commitment and collaboration and/or Insufficient absorption capacity of beneficiary BSOs and/or SMEs.
	Number of BSOs trained	N/A	0	10.00	Post-event report; Project reports; Consultant reports	
	Number of workshop participants	Number of participants to group trainings	0	70.00	Post-event report; Project reports; Consultant reports	
	Number of women participants of the workshops	Number of female participants to group trainings	0	25.00	Post-event report; Project reports; Consultant reports	
	Number of new/improved services provided by BSOs	B1: Number of cases in which BSOs improved their performance and services for the benefit of their members/clients as a result of ITC support	0	6.00	Project reports; Consultant reports; Company surveys	
Output: Output: Output 4: Market linkages created for SMEs from fruits, vegetables and nuts sectors to expand their sales domestically and internationally (in particular, with a focus on the EU market).	Number of trade fairs/buyer-seller meetings that beneficiary companies have attended	Number of advisory services provided	0	7.00	Feedback from SMEs/ company surveys; Project reports	Assumptions: - <input type="checkbox"/> SMEs are open to changing existing practices and are committed to implementing project recommendations - <input type="checkbox"/> SMEs are ready to cost share Risks: - 1. Further spread of COVID-19 and increased uncertainties with negative consequences on business activities
	Number of companies participating in trade fairs/ buyer-seller meetings	N/A	0	70.00	Post-event reports; Feedback from SMEs/ company surveys; Project reports	
	Number of participating companies in the trade fairs/buyer-seller meetings that are women owned/operated/ controlled or with majority women employed	N/A	0	10.00	Post-event reports; Feedback from SMEs/ company surveys; Project reports	
	Number of business contacts made as a result of participation in trade fairs/buyer-seller meetings	N/A	0	700.00	Post-event reports; Consultant reports; Feedback from SMEs/ company surveys; Project reports	

Annex 3: Training Courses

year	Topic
2001	
2	workshops on ITC Market Analysis Tools for Ukrainian SMEs and associations
3	An online workshop focused on export planning and international business networking organized in cooperation with the Dnipropetrovsk Chamber of Commerce and Industry, and the Dnipropetrovsk Regional State Administration
4	An on-site training for F&V producing and processing companies of the Vinnitsa and its neighbouring regions
5	An online training focused on export/import statistics navigation and analytics to prepare towards international trade fairs and foreign business missions
6	Three webinars on hazelnut cultivation and postharvest handling . These webinars were conducted at the request of the Ukrainian Nut Association and its members, representing commercial hazelnut orchards from different regions of Ukraine: - Webinar on hazelnut orchards design, pollination efficiency and reproductive patterns, hazelnut varieties, harvesting machinery and equipment, protection of tree with windbreaks and application of fertilizers; - Webinar on hazelnut plant protection against diseases and insects; Webinar on hazelnut nutrition, irrigation, pruning and postharvest
7	An online awareness webinar on Quality & Compliance in the wine sector as a part of preparation for a study tour to Moldova. The speakers presented two existing models of food safety and 6 quality controls in the EU and Moldova
7	Two workshops were conducted online for producers, processors and associations, selected to participate in the International Trade Fair for the Food and Beverage Industry ANUGA 2021: - Workshop "Before the Fair" focused on general objectives for trade fair participation and provided general facts about the event , COVID-19 safety regulations, arrangement of the collective stand, preparation of marketing copies and samples; - Workshop "Participation and Communication – At the Fair" focused on communication objectives and common communication mistakes, logistics, preparation of sales materials and resources, meeting records, making appointments before and during the trade fair, including with a mobile application, as well as collection of information from competitors (14 participants, including 9 women; 9 SMEs, 1 BSO).
8	An online orientation session for the Ukrainian fresh F&V producers and their associations, selected to showcase at the International Specialized Fair of Fruits and Vegetables, FRUIT ATTRACTION. The participants were provided with general facts about the trade fair and requirements on marketing copies , demos and samples; were informed of COVID-19 related safety regulations; received recommendations on keeping meeting records, making appointments before and during the trade fair, including with a mobile application;
10	An online orientation workshop "GRASP – Social Responsibility Certificate for the European market" organized in cooperation with the Ukraine Horticulture Business Development Project (UHBDP) to cover the EU requirements for fruit and vegetables, various international certificates required for exports and, in particular, GLOBALG.A.P. Risk Assessment on Social Practice (GRASP)
11	A two-day training "Farm Certification according to GlobalG.A.P. International Standard" aimed to provide the producers with an overview of the standard requirements including its main principles, procedures and benefits. The participants visited Organic-D LLC farm, which had been certified with the project support
2022	
12	Awareness building presentation in hazelnut protection (fertilisers, chemicals and when to apply them, frost protection, brief disease information, insect control) and on innovations (pruning for increased production, new harvesting equipment to reduce labour needs), delivered during the conference "Nut Ukraine. Meeting Global Challenges", organized by The Ukrainian Nut Association (UNA). for hazelnut producers, held in the Kyiv region on February 4, 2022 (number of participants: 148, women: 47; BSOs: 2, SMEs – 68).
13	Three (3) online workshops for the producers, processors and their associations, selected to participate in the Gulfood 2022 international food and beverage trade fair: 7 - The "Before the Fair" workshop described the general objectives 14of trade fair participation and provided general facts about the event , arrangement of the collective stand, and preparation of marketing copies and samples. (12 participants, including 4 women; 6 SMEs, 2 BSOs); - The "At the Fair" workshop covered communication objectives and common communication mistakes, logistics, sales materials and resources preparation, and meeting records. (14 participants, including 2 women; 7 SMEs, 3 BSOs); - The "Ready to go?" workshop focused on improving skills on how to make appointments before and during the trade fair, including using the relevant application provided by the trade fair, collecting information from competitors, and following up. (15 participants, including 4 women; 8 SMEs, 3 BSOs).
14	Four (4) individual coaching sessions were organized for the collective stand participants in-between the general coaching sessions in February 2022.
15	A series of visits were carried out to 6 hazelnut orchards located in different parts of Ukraine to hold pruning masterclasses , assess the orchards' condition and provide advisory services to growers on how to improve current practices in terms of hazelnut care, nutrition, genetics, and plant protection. (28 people, including 1 woman, 8 SMEs, 1 BSO).
16	Seven (7) subsequent online trainings to raise Ukrainian wine producers' awareness on improving grape wine production techniques in terms of quality and compliance control during the fermentation process, processing and stabilization of wine materials, wine bottling, blending and storage: - "Obtaining high-quality raw materials for grape wine production" covered quality and compliance control of raw materials, including grape varieties, specificity, and criteria for determining the harvest date. (41 participants, including 11 women; 27 SMEs, 3 BSOs and 1 policy institution); - "Primary processing and obtaining quality wine materials" focused on primary processing and obtaining quality wine materials, including control of auxiliary materials selection (antioxidants, yeasts, enzymes, etc.),12 must clarification, maceration, chemical balance of must, and must racking. (34 participants, including 10 women; 20 SMEs, 1 policy institution); - "Production of high-quality white, rosé, orange and sparkling wines". (33 participants, including 9 women; 24 SMEs, 2 BSOs); - "Production of high-quality red wines". (30 participants, including 11 women; 18 SMEs, 2 BSOs and 1 policy institution); - Training "Wine aging in wooden barrels" covered quality barrel selection and wine aging in oak barrels. (24 participants, including 6 women; 11 SMEs, 2 BSOs and 1 policy institution); - "Processing and stabilization of wine materials". (29 participants, including 8 women; 16 SMEs, 2 BSOs and 1 policy institution); - Training "Wine bottling process" covered quality and compliance control during wine bottling and blending, preparation of wine for bottling and cold sterile wine bottling. (24 participants, including 7 women; 17 SMEs, 1 BSO and 1 policy institution). Each training was followed by a Q&A session, providing for questions and practical advice.

year	Topic
17	Three (3) preparation briefings were conducted online for producers, processors and their associations selected to participate in the SIAL 2022 international food trade fair and at the International Specialized Fair of Fruits and Vegetables FRUIT ATTRACTION 2022, the Ukrainian fresh producers and their associations were also invited to join the general sessions. - The "Before the Fair" workshop briefing covered the key points of trade fair preparation, factors for success, the benefits of using the trade fair website, preparation of marketing materials including samples and "rules" for success, stand presentation, and key messages. (19 participants, including 7 women; 15 SMEs, 2 BSOs); - The "At the Fair" workshop described communication objectives and personal presentation, making appointments, listing buyers to contact, keeping meeting records, identifying potential leads, and visiting stands of buyers and competitors. (16 participants, including 8 women; 12 SMEs, 1 BSO); - The "Ready to go?" workshop focused on logistics issues, appointments, trade fair working schedule, and preparing for follow-up after the show. (10 participants, including 5 women; 6 SMEs, 1 BSO). 12 Antioxidants, yeasts, enzymes, etc. 8
18	An online coaching session was conducted as a preparatory meeting for the Ukrainian fresh producers and their associations, selected to showcase at FRUIT ATTRACTION 2022 within the ITC collective stand. The participants were provided with general facts about the trade fair and marketing copies, demos, and samples requirements. They received recommendations on participation arrangements, making appointments before and during the trade fair, including using the applications provided by the trade fair organizers (10 participants, including 5 women; 6 SMEs, 1 BSO).
19	A series of 6 online training modules were conducted to raise awareness of Ukrainian vine growers and wine producers on the application of the principles of sustainable development in viticulture and winemaking : - Module 1, "General issues of sustainability in the vine-growing and winemaking sector", covered: (i) key economic, social and environmental challenges (climate change, biodiversity loss, water and resource depletion, waste generation), (ii) experience and heritage values in the wine sector, (iii) social/community and environmental responsibility, (iv) sustainability assessment tools (life cycle analysis, carbon balance, human footprint), (v) key international requirements, accreditation of viticultural approaches to sustainable development at the international level, (vi) fundamentals and implementation of the environmental/sustainable management process. (21 participants, including 6 women; 10 SMEs, 3 BSOs); - Module 2, "Sustainable development management", focused on: (i) main aspects in the wine sector (ecology, food safety, staff safety and comfort, cellars and vineyards in their natural environment), (ii) international standards ISO 14001 and ISO 26000, (iii) certification process, (iv) global viticulture and winemaking strategies, (v) sustainable development management and control tools, continuous improvement process, (vi) communication tools, drafting a sustainability report. (23 participants, including 8 women; 11 SMEs, 2 BSOs); - Module 3, "Grapes and climate: basics, climate risks, adaptation to climate change, reduction of the greenhouse effect", covered: (i) climate characteristics (climatic zones, microclimates, measurement methods), (ii) climate and viticulture (climate indicators, impact on the phenology and physiology of vine); adaptation of management practices and grape varieties, (iii) IPCC scenario activities, main impacts, adaptation potential of vineyards and wine production, (iv) adaptation to extreme conditions (spring frosts, hail, water stress), (v) reduced impact of the greenhouse effect (carbon footprint, adaptation of agricultural practices for growing grapes, climate plan). (19 participants, including 6 women; 12 SMEs, 1 BSO); - Module 4, "Biodiversity of vine-growing terroirs", focused on: (i) national and international challenges, accreditation systems and regulatory framework, (ii) biodiversity assessment systems, (iii) operational approaches within sites and terroirs, (iv) new areas – agroecology, agroforestry, wine cellar biodiversity. (13 participants, including 3 women; 6 SMEs, 2 BSOs); - Module 5, "Introduction of integrated, sustainable, organic and biodynamic vine-growing and winemaking", covered: (i) global viticulture approaches, (ii) protection of users of vineyards and surrounding areas, (iii) establishment of a vineyard and its development in terms of landscape and biodiversity, (iv) soil management, herbicide limitation, carbon storage, (v) soil erosion control, (vi) phytosanitary protection management, pesticide reduction, (vii) low greenhouse gas technologies, (viii) waste management, packaging and phytosanitary wastewater. (12 participants, including 5 women; 3 SMEs, 1 BSO); - Module 6, "Eco-design of wine cellars", covered: (i) green building, (ii) landscape integration, (iii) energy efficiency and alternative energy sources (solar- and geothermal energy, energy recovery from grapes and winemaking by-products), (iii) water management, (iv) environmental management of wastewater from wineries, (v) workers' comfort and safety. (12 participants, including 5 women; 4 SMEs, 2 BSOs).
20	Two (2) subsequent practical webinars on the basics of export marketing improvement and development action planning : - "Introduction to Export Marketing Planning", focused on rationale for export marketing planning, definition of responsible staff, planning process and tools (6 participants, including 3 women; 5 SMEs); - "Introduction to Export Marketing Planning", focused on detailed analysis of export marketing improvement and development action plan template, the document structure and review of short export marketing plan examples (3 participants, including 1 woman; 3 SMEs).
21	A workshop on the basics of drying fruits, including to raise Ukrainian wine producers' awareness on improving grape wine production techniques in terms of quality and compliance control. (13 participants, including 4 women; 12 SMEs).
2023	
22	An online coaching session for the Ukrainian fresh producers and their associations, selected either to exhibit at FRUIT LOGISTICA 2023 within the collective stand organized by ITC, or attend the trade fair with a study visit. It is a part of trade fair preparation.
23	An online awareness-building event organized together with the International Wine Organisation (OIV) The aim is to present the OIV structure and its technical committees, where Ukrainian representatives can participate and what are the benefits of working in those committees
24	An online coaching session for the Ukrainian producers and exporters of fruit, vegetables and edible nuts, selected either to showcase at GULFOOD 2023 within the Ukraine collective stand organized by ITC, or participate with a study visit. It is a part of trade fair preparation
25	Four (4) workshops for the Ukrainian agri-producers willing to export to the EU through B2C online channels. Each workshop included the Q&A session, providing for questions and practical advice <ul style="list-style-type: none"> • "E-commerce Strategy" workshop covered the key elements of e-commerce strategy, online channels, e-commerce models and mono/omnichannel approaches striving to foster the participants' understanding of how customers search online, why online visibility is important and how to improve it. (48 participants, including 16 women; 30 SMEs, 4 BSOs) • "Selling Online Through Marketplaces" workshop, major B2C online marketplaces were reviewed, pros and cons of selling through marketplaces and success factors (e.g. alignment with e-commerce strategy, quality content, customer communication, investing in analytics) were discussed. The participants were presented the ecomConnect cost calculator developed by ITC and based on the pricing by the world leading online marketplaces, e.g. Amazon, eBay, Etsy, and Shopify. (22 participants, including 7 women; 19 SMEs, 1 BSO)

year	Topic
	<ul style="list-style-type: none"> • "Case Review: Selling on eBay" workshop was designed to give the participants a deep dive into eBay marketplace with focus on its European platforms; demonstrate the eBay market analysis tool helping to access the product demand, competition and pricing strategy. (28 participants, including 14 women; 22 SMEs, 1 BSO) • The "Importance of Online Content" workshop covered the essence of quality e-commerce content for both the company and the product, its significance for success in sales and operation activity and the next steps recommended.
26	<p>An online training for the participants of the study tour to France and Spain of the delegation of Ukrainian small wine producers, and the representative of the Ministry of Agrarian Policy and Food of Ukraine in continuation of the training cycle in sustainable development delivered in 2022. The objective of the study visit was to contribute to the practical experience exchange between the selected project beneficiaries and local enterprises practicing sustainable vine-growing and winemaking in terms of sustainable life cycle analysis, social aspects as part of corporate and social responsibility, social and environmental responsibility, changes caused by climate change, etc. (14 participants, including 6 women; 14 SMEs)</p> <p>An online coaching training for the participants of the study tour to Georgia of the delegation of Ukrainian hazelnut growers and the Ukrainian Nut Association to learn the best practices of hazelnut post-harvest handling, processing and storage. The participants were provided the overview of the world hazelnut production and consumption, production and supply chain organization in Georgia, in particular.</p>
27	<p>Four (4) online workshops on wine tourism and rural development. Each workshop included the Q&A session, providing for questions and practical advice.</p> <ul style="list-style-type: none"> • "What Is Wine Tourism and Why It Is Important" workshop focused on motivation and drivers of the wine tourism, its economic effects, and different kinds of objectives. (41 participants, including 20 women; 27 SMEs, 5 BSOs) • "Different Wine Tourism, Different Wine Tourists" workshop presented the scale and various kinds of wine tourism and wine tourists. (33 participants, including 11 women; 25 SMEs, 3 BSOs) • "Practicalities: How a Small Winery Can Start or Do Wine Tourism" workshop outlined the challenges faced by small winemakers, tasks and their allocation, investments, customer relationship. (29 participants, including 15 women; 17 SMEs, 4 BSOs) • "Wine Tourism Is Also Collaboration" workshop described the role of hotels, restaurants, food producers, culture; government and municipalities in wine tourism as well as collaborative organizations. (25 participants, including 10 women; 17 SMEs, 3 BSOs)
28	<p>"What do EU Buyers Expect from Their Suppliers?" online training, organized in cooperation with the Rural Women Business Network, was focused on the EU requirements towards food products imported from Ukraine, and how ITC Market Analysis Tools can help MSMEs to learn more about food safety requirements</p> <p>An online awareness building training on ITC Market Analysis Tools organized together with the Dnipropetrovsk Chamber of Commerce and Industry was intended to acquaint SMEs with the functionality of the large databases on trade statistics, tariff data, and rules of origin related to applicable free trade agreement. (37 participants, including 22 women; 30 SMEs and 3 policy institutions)</p> <p>Two (2) online workshops on mandatory and optional winemaking equipment for MSME producers. Each presentation was followed by a Q&A session, providing for questions and practical advice.</p> <ul style="list-style-type: none"> • Workshop 1 covered equipment for grape harvest and postharvest handling, heat exchangers to cool grapes and must, equipment for grape crushing, stem separation and must clarification, must and pulp pumps, presses and fermentation tanks. (36 participants, including 8 women; 26 SMEs, 1 BSO and 1 policy institution) • - Workshop 2 continued the topic and covered the rest of mandatory/optional winemaking equipment, e.g. filters, refrigerators, sparkling wine equipment, bottling lines and bottling machinery, barrels and barrel washers, wine storage containers, water sterilization machines and packaging equipment. (27 participants, including 7 women; 22 SMEs, 1 BSO)
29	<p>Two (2) online workshops on wine labelling and packaging regulations applied in the EU for wine producers of different size focusing on MSME winemakers. Each workshop included the Q&A session, providing for questions and practical advice</p> <ul style="list-style-type: none"> • Workshop 1 included the overview of the current legal packaging and labelling requirements imposed on wines, including the Regulation (EU) No 1308/2013 of the European Parliament and of the Council of 17 December 2013, the Regulation (EU) No 2019/787 of the European Parliament and of the Council of 17 April 2019 and Regulation (EU) No 251/2014 of the European Parliament and of the Council of 26 February 2014. (23 participants, including 6 women; 18 SMEs, 2 BSOs) • Workshop 2 included information on labelling of wines and must- and wine-based products, mandatory/voluntary labelling requirements and labelling mistakes, Protected Geographical Indication and Protected Designation of Origin. (21 participants, including 9 women; 14 SMEs, 3 BSOs)
30	<p>A series of three (3) workshops on market information systems for Ukrainian growers, processors and exporters of edible nuts, walnuts and hazelnuts in particular, offering a practical guide to global markets and market information. The international and national consultants throughout the project prepared regular market reviews. The business highly appreciated the presence of such regular reports. The goal of this webinar series is to teach businesses and associations to independently seek market information, analyse trends, choose information sources correctly, and continue making managerial decisions. To continue this work and ensure the sustainability of knowledge and the training of potential analysts, this training session was organized.</p> <ul style="list-style-type: none"> • "Case Study" workshop gave a review of the walnut and hazelnut market situation. Together with the speaker, the participants formulated the reasons why they need market information and what market information is needed. (30 participants, including 9 women; 22 SMEs and 1 BSO) • "Market Information Systems" workshop covered the method to build own information system. (24 participants, including 11 women; 17 SMEs and 1 BSO) • "Practical Guide on Where to Find Market Information" was dedicated to identification of real sources and methods for exporters. (12 participants, including 5 women; 7 SMEs and 2 BSOs)
31	<p>A series of five (5) workshops in viticulture for a raising awareness of Ukrainian vine-growers on the importance of incorporating the principles of traceability, sustainable viticulture and efficiency in their daily practices were conducted with one of the world leading research institutes, Australian Wine Research Institute. Each workshop included the Q&A session, providing for questions and practical advice.:</p>

year	Topic
	<ul style="list-style-type: none"> • "Soils, Weeds and Cover Cropping in Viticulture" looked into the linkages between soils, their nutrition, management and the role weed control plays within that system using examples from field research and grape-growers in Australia. (79 participants, including 29 women; 43 SMEs, 1 BSO and 1 policy institution) • "New Technologies in Viticulture to Increase Efficiency" workshop focused on modern vineyard technologies; it covered destemming and sorting systems for mechanical grape harvesters, multi-row equipment and autonomous robots and tractors. (54 participants, including 16 women; 28 SMEs and 1 BSO) • The "Irrigation" session covered basic aspects of vine physiology, vineyard water demands, and how they influence irrigation management. The key focus was on technologies and strategies to enhance irrigation scheduling, including soil moisture sensors, estimation of crop evapotranspiration, the irrigation system efficiency and a brief introduction to plant-based sensors. (56 participants, including 18 women; 25 SMEs) • The "Pest and Disease Management" workshop focused on the fundamentals of insect pest and fungal disease management. It introduced the concept of Integrated Pest Management and the importance of understanding the life cycle of the pest being controlled, whether it is an insect or fungal pathogen. A brief discussion was held on applying vineyard sprays and the role this plays in controlling disease. (63 participants, including 19 women; 21 SMEs and 2 BSOs) • The "Vineyard Establishment" workshop provided an overview to the key areas of Vineyard Site Selection, Preparation and Planning, and Vineyard Establishment. Key site selection topics were discussed including climate and weather, site and soil attributes, topography, water and labour availability. (56 participants, including 20 women; 24 SMEs and 2 BSOs)
32	<p>A series of five (5) online workshops aimed to raise awareness of Ukrainian winemakers on the importance of traceability, and ways to improve grape wine production techniques in terms of quality and compliance control:</p> <ul style="list-style-type: none"> • The "Juice Processing" workshop covered methods for clarification of white juice and best practice juice handling procedures, laboratory tests as well as additions, fining and juice adjustments. (82 participants, including 31 women; 45 SMEs, 3 BSOs and 1 policy institution) • "Fermentation" covered the technical aspects of fermentation management. It highlighted the latest research, know-hows, the practices winemakers are currently doing and challenges they are facing; it examined new practices to reduce SO₂ use, yeast choice and its implications on flavour but also nutrient demand, yeast SO₂ production and ferment issues. (70 participants, including 20 women; 37 SMEs and 1 BSO) • The workshop "Wine Composition, Quality Control, Managing Taints and Faults" focused on grape and wine composition in a changing climate which has winemaking implications. The presentation highlighted the main faults and taints throughout the winemaking process and provided prevention strategies. (52 participants, including 20 women; 31 SMEs and 3 BSOs) • "Post-Fermentation Wine Storage and Management" covered the key points relating to keeping wine in good condition during post-fermentation storage, and some of the common wine faults observed during spoilage, how to recognize these as well as how to identify if your wine might be at risk of spoilage. (68 participants, including 24 women; 30 SMEs) • The "Bottling and Packaging" session focused on the key pressure points that winemakers need to understand and manage to confidently prepare, finish, and package a wine to reach the customer as intended. (61 participants, including 23 women; 27 SMEs) • Three (3) preparation workshops for the producers, processors and their associations selected to participate in ANUGA 2023 international food trade fair. The Ukrainian fresh producers and their associations participating with ITC project in the International Specialized Fair of Fruits and Vegetables FRUIT ATTRACTION 2023 were also invited to join the general sessions. • "Before the Fair" workshop briefing covered the key points of trade fair preparation, factors for success, benefits of using the trade fair website, preparation of marketing materials including samples and "rules" for success, stand presentation, and key messages. (28 participants, including 14 women; 17 SMEs, 3 BSOs) • "At the Fair" workshop described communication objectives and personal presentation, making appointments, listing buyers to contact, keeping meeting records, identifying potential leads, and visiting stands of buyers and competitors. (18 participants, including 9 women; 12 SMEs and 3 BSOs) • "Ready to Go?" workshop focused on logistics issues, appointments, trade fair working schedule, and preparing for follow-up after the show. (10 participants, including 4 women; 9 SMEs, 1 BSO)
33	An online preparatory meeting for the Ukrainian fresh producers and their associations, selected to exhibit at FRUIT ATTRACTION 2024 within the Ukraine collective stand organized by ITC. (7 participants, including 4 women; 5 SMEs and 1 BSO)
34	The webinar "What do EU Buyers Expect from Their Suppliers?" organized in cooperation with the Agency of Regional Development of the Tavria Association of Territorial Communities was focused on the EU requirements towards food products imported from Ukraine and ITC Market Analysis Tools. (18 participants, including 12 women; 18 SMEs)
35	An awareness building presentation of Wine Australia and its industry's regulatory framework for Ukrainian viticulturists, winemakers, government representatives and sector associations, focusing on sector organization in Australia, the role of Wine Australia as the national association of vine-growers and winemakers, its structure, strategy and sources of funding. (45 participants, including 17 women; 17 SMEs, 4 BSOs and 1 policy institution)
36	"The World Hazelnut Market" awareness building webinar gave an overview of the production, consumption, trends, and forecasts for the global hazelnut market including price history and supply/demand forecasts. It considered what these mean for Ukrainian hazelnut producers and processors and the opportunities that exist for them. (21 participants, including 5 women; 13 SMEs and 1 BSO)
37	The awareness building presentation of the Wine Institute of California for Ukrainian viticulturists, winemakers, government representatives and sector associations of the experience of the vine-growing and winemaking sector organization in the USA and California in particular, as well as the vision, structure, strategy aims, sources of funding and activities conducted by the Wine Institute. (49 participants, including 18 women; 22 SMEs, 5 BSO and 1 policy institution)
38	The World Walnut Market" workshop gave an overview of the production, consumption, trends, and forecasts for the global walnut market including price history and supply/demand forecasts. It considered what these mean for Ukrainian hazelnut producers and processors and the opportunities that exist for them. (19 participants, including 4 women; 14 SMEs and 1 BSO)

year	Topic
39	The awareness building presentation of the Austrian Wine Marketing Board for Ukrainian viticulturists, winemakers, government representatives and sector associations the experience of the vine-growing and winemaking sector organization in Austria, as well as the vision, structure, strategy aims, sources of funding and activities by the Board. (37 participants, including 12 women; 22 SMEs and 4 BSO)
40	Hazelnut Processing and Harvesting. Nut Waste and By-Products Usage and Exploitation " awareness building webinar focused on hazelnut harvesting, post-harvest handling and processing organization with regard to the growers' type and scale; products and standards, in particular, in terms of quality; food safety and risk management; value added and marketing; nut waste and by-products usage and exploitation. (30 participants, including 7 women; 22 SMEs and 1 BSO)

Annex 4: Results as reported 2023

Indicator and target	Achieved in 2023	Achieved in 2021-2022	Main activities and related milestones	Timeframe	Progress	Comments
OUTPUT 1: Capacities of SMEs strengthened to improve international competitiveness						
- Number of value chains analysed Target: 2 - Number of roadmaps (intervention strategies) developed/updated Target: 2	1	2	Activity 1.1 Update the roadmap for the nut sector based on public private stakeholders' consultations			
			<i>Road map for the nuts sector updated</i>		Completed	<i>The road map was updated in February 2022. The war changed the situation in the sector. It may be necessary to further analyze and update following the end of hostilities.</i>
			Activity 1.2 Conduct value chain analysis of the wine sector and develop a roadmap		Completed in 2021	
			Activity 1.3 Draft and finalize market-led value chain development document/Road map, including industry specific technical assistance solutions for SMEs and producers to enhance their competitiveness			
			<i>Drafting of Road map and Action plan for wine sector</i>		Completed in 2021	
			Activity 1.4 Organize a public-private event to validate findings of Activities 1.1. and 1.2			
			<i>Road map review event for nut sector</i>		Rescheduled to 2024	<i>To be rescheduled in conjunction with Activity 1.1</i>
			<i>Road map presentation for wine sector</i>		Completed in 2022	
<i>Disseminate Road map to stakeholders in the region</i>			Completed	<i>The Ukrainian version was disseminated among the stakeholders. It was also published on the project's webpage.</i>		
OUTPUT 2: Capacities of SMEs strengthened to improve international competitiveness						

<p>- Number of training courses, seminars and workshops conducted. Target: 14</p> <p>- Number of advisory services provided (by specific technical area). Target: 12</p> <p>- Number of SMEs trained. Target: 70</p> <p>Unique on the annual basis</p> <p>- Number of SMEs trained that are women owned/operated/controlled or with majority women employed. Target: 20</p> <p>- Number of participants in workshops. Target: 400</p>	42	34	Activity 2.1: Conduct training and awareness building workshops for SMEs in selected areas based on the roadmap			
			<u>Trainings for ALL</u>			
			<i>Trainings on trade fair participation, how to approach international buyers (i.e., how to prepare for meetings, interact during meetings, negotiate, and follow-up including development of company marketing materials)</i>	<i>February, September</i>	<i>Completed</i>	<i>The trainings were conducted for co-exhibitors and study tour participants and trade fair exhibitors, including SMEs and Associations as part of preparations for ANUGA and Fruit Attraction trade fairs.</i>
	2	8	<i>Series of trainings on E-commerce for the processing F&V, berries and nut companies, total 4</i>	<i>May</i>	<i>Completed</i>	
			<i>Awareness building webinar in EU requirements towards food products and food safety requirements</i>	<i>June</i>		<i>The event was organized in cooperation with the Rural Women Business Network,</i>
			<i>Training on waste management for the nut processing companies</i>	<i>1-10 February</i>	<i>Completed</i>	<i>The trainings were conducted during the IC's, Dr Ross Penhallegon (Associated Professor of Oregon State University), visit. The trainings were conducted directly in the orchards.</i>
	229 (unique)	132 (unique)	<i>Webinar on how to analyse the markets using ITC market analysis for private companies</i>		<i>Completed</i>	<i>The event was conducted together with the Dnipro Chamber of Commerce.</i>
	856 (aggregated)	386 (aggregated)	<i>workshops on market information systems for Ukrainian growers, processors and exporters of edible nuts, walnuts and hazelnuts</i>	<i>November</i>	<i>Completed</i>	
	20	20	<i>Online awareness building webinars in the world hazelnut and walnut markets, total 2</i>	<i>December</i>	<i>Completed</i>	
			<i>Online Awareness building webinar in Hazelnut Processing and Harvesting. Nut Waste and By-Products Usage and Exploitation</i>	<i>December</i>	<i>Completed</i>	
		<u>Trainings for wine sector</u>				

- Number of women participants in the workshops. Target: 60	1449	690	An online awareness-building event about OIV structure and its technical committees, where Ukrainian representatives can participate and what are the benefits of working in those committees	February	Completed	The event was organized together with the International Wine Organisation (OIV).
			Training in labelling and packaging regulations applied in the EU, total 2	June-July	Completed	
			Training in Tourism (wine tourism) and rural development: «Tourism services at a winery as an opportunity to increase the financial sustainability of the enterprise and create jobs in rural area, total 4	June	Completed	The series of trainings included social responsibility, economic stability, and ecological issues (biodiversity, climate change etc).
	539	228	Workshops on mandatory and optional winemaking equipment for MSME producers, total 2	July	Completed	
			Series of online workshops in viticulture for a raising awareness of Ukrainian vine-growers on the importance of incorporating the principles of traceability, sustainable viticulture and efficiency in their daily practices, total 5	August	Completed	The event was conducted with the world leading research institutes, Australian Wine Research Institute.
			Series of online workshops aimed to raise awareness of Ukrainian winemakers on the importance of traceability, and ways to improve grape wine production techniques in terms of quality and compliance control, total 5	September	Completed	The event was conducted with the world leading research institutes, Australian Wine Research Institute.
			Activity 2.2: Provide direct assistance to pilot SMEs and producers through advisory services in selected areas based on the roadmap			
			Individual advisory services to SMEs to prepare for interaction with the market (min 10)	January-October	Completed	Individual consultancy on negotiating, trade fair preparation, preparing marketing materials for F&V producers and exporters were held as trade fair preparation activities.
			Support selected (min 3) enterprises to achieve globally recognized certification standards		Postponed	The number of new companies ready to invest in certification is very limited
Provide direct assistance F&V, berries and nuts processors to establish online sales on the international platforms (min 3)		Postponed	This activity should be co-financed from the beneficiary's side. Due to the			

						<i>situation in the country the activity was postponed</i>
			<i>Provide direct assistance for the small winemakers to improve the quality and cultivation of grapes</i>		<i>Postponed</i>	<i>Due to the insecure situation for travels, the project could not invite the IC to visit the wineries</i>
			<i>Provide direct assistance to small winemaking companies in labelling</i>	<i>April-December</i>	<i>Completed</i>	
			<i>Assist in preparing Export Market plans for nutprocessors and producers (min 3)</i>	<i>April-December</i>	<i>Completed</i>	<i>Four nut exporters and growers prepared the individual market plans under the supervision of International and national consultants.</i>
			<i>Provide direct assistance to small winemaking companies in labelling, packaging and developing promotional materials</i>	<i>April - October</i>	<i>Postponed to 2024</i>	<i>The activity will depend on the budget availability.</i>
			<i>Activity 2.3: Establish an information-knowledge sharing platform for SMEs and producers in each region</i>			
			<i>Information sharing event was organized for the winemakers to share their experience and practical actions after the visit to France/Italy</i>	<i>February</i>		<i>The participants shared their views with those winemakers, who did not participate in the visit.</i>

OUTPUT 3: Capacities of BSOs strengthened to provide SMEs with relevant business support services

- Number of training courses, seminars and workshops conducted. Target: 6	1	1	Activity 3.1: Conduct trainings including on-the-job trainings for selected BSOs on key areas for improvement			
			<i>On the job training by involving BSOs in activities 1.1, 1.2, 2.1, 2.2, 4.2, and 4.3</i>	<i>June-November</i>	<i>In process</i>	<i>The project continues to involve the BSOs in organizing trainings and trade fair participation.</i>
- Number of BSOs trained. (aggregated) Target: 10	1	1	<i>Workshop in developing the Vision and Action Plan for UNA, followed by individual consultations for Ukrainian Nut Association</i>	<i>October-December</i>	<i>In process</i>	<i>UNA management developed the Vision and Strategy, the portfolio of services they plan to provide to members and non-members under the supervision of the ITC International Consultant .</i>
- Number of workshop						

participants. Target: 70 - Number of women participants of the workshops. Target: 25 - Number of new/improved services provided by BSOs. Target: 6	2	5	Activity 3.2: Create mechanisms for cooperation and information-sharing between Ukrainian BSOs and their foreign counterparts			
			<i>Information sharing event and awareness building meeting between International Organization of Vine and Wine (OIV) and wine sector representatives</i>	<i>February</i>		
	1	1	<i>Establishing an information-knowledge sharing platform for small winemakers</i>	<i>July</i>	<i>Completed</i>	<i>The project helped to establish links between the Association Of craft winemakers of Black Sea and the Association of winegrowers in France.</i>
			Activity 3.3: Help selected national BSOs to become resource centres to collect, archive and share knowledge from seminars and trainings conducted under the project			
	0	1	<i>To share training materials, contacts of consultants to enable BSOs to replicate events and transfer knowledge to a wider group</i>	<i>February-October</i>	<i>In process</i>	
			<i>Local BSOs learned to develop road maps/actionplans by involving them in the project activities</i>	<i>March-October</i>	<i>Completed</i>	
			Prepare an Action Plan for UNA to become a resource centre for the sector	<i>December</i>	<i>In process</i>	
OUTPUT 4: Business linkages created for SMEs to expand sales in both domestic and international markets, in particular in EU						
- Number of trade fairs/buyer-seller meetings that beneficiary companies have attended. Target: 7 - Number of companies participating in trade fairs/buyer-seller meetings. Target: 70 (aggregated)	5	8	Activity 4.1: Identify potential markets and new buyers for the target product groups			
			<i>Identify potential markets and new buyers for thefor nuts sector</i>	<i>June-December</i>	<i>Completed</i>	<i>Will be delivered as part of the road map update.</i>
			<i>Online presentation of Ukrainian edible nut sectorto foreign buyers and potential investors</i>	<i>September</i>	<i>Cancelled</i>	<i>Activity cancelled as it is hard to achieve the desired results during war time.</i>
	39 (aggregated)	59 (aggregated)	Activity 4.2: Assist pilot SMEs in preparation for trade fairs, buyer/seller events and study tours, including developing practical guides on export procedures and requirements for selected priority markets (if needed)			
			<i>Prepare pilot SMEs for trade fairs and study tours(for new companies)</i>	<i>May</i>	<i>Completed</i>	
		<i>Assistance to improve marketing materials i.e.brochures, catalogues</i>		<i>Ongoing</i>		

<p>- Number of participating companies in the trade fairs/buyer-seller meetings that are women owned/operated /controlled or with majority women employed. Target: 10</p> <p>- Number of business contacts made as a result of participation in trade fairs/buyer-seller meetings. Target: 700</p>	4	8	Activity 4.3: Organize participation of pilot SMEs in trade fairs, buyer/seller events, and study tours			
			<u>Trade fairs</u>			
			FRUITLOGISTICA 2023, Berlin, Germany	8-10 February	Completed	
			GULFOOD 2023, Dubai UAE	20-24 February	Completed	
			FRUITATTRACTION 2023, Madrid, Spain	3-5 October	Completed	
			ANUGA 2023, Cologne, Germany	7-11 October	Completed	
			<u>Buyers/seller missions</u>			
			<i>Sweden, Stockholm for winemakers, nut and frozen berry exporters</i>			The mission was organized and financed by the National Board of Trade Sweden. The project helped to mobilize the participants among the project beneficiaries.
	<u>Study tours</u>					
	<i>Study tour to Spain/France for small winemakers in sustainable practices in the vineyards</i>	May	Completed	<i>To gain practical experience in sustainable growing methods in the vineyards for the private and public sectors.</i>		
	<i>Study tour to Georgia for hazelnut growers to learn the best practices of hazelnut post-harvest handling, processing and storage</i>	June	Completed			
	<i>Study visit for representatives of Ukraine's Ministry of Agriculture to aid Ukraine in adopting the Vine and Wine register, an essential component for aligning with EU standards in winemaking.</i>	November	Completed			
	2221	1332				

Annex 5: Workplan January - December 2024

Main activities and related milestones	PLANNED	STATUS	COMMENTS	YEAR 2024											
				Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
OUTPUT 1: Roadmap updated and/or developed for selected value chains															
Activity 1.1 Update the roadmap for the fruits and vegetables sector based on public private stakeholders' consultations															
<i>Road map for the nuts sector and wine sector update</i>		Cancelled	Update the Strategic Road maps taking into consideration the situation in Ukraine when the military actions are over.												
Activity 1.2 Conduct value chain analysis, develop a roadmap (wine sector)		Completed in 2021													
Activity 1.3 Draft and finalize market-led value chain development document/Roadmap, including industry specific technical assistance solutions for SMEs and producers to enhance their competitiveness (wine sector)		Completed in 2021													
Activity 1.4 Organize a public-private event to validate findings of Activities 1.2 and 1.3.															
<i>Road map review event for nut sector</i>			To be planned in conjunction with Activity 1.1.												

Main activities and related milestones	PLANNED	STATUS	COMMENTS	YEAR 2024											
				Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
OUTPUT 2: Capacities of SMEs strengthened to improve international competitiveness															
Activity 2.1: Conduct training and awareness building workshops for SMEs in selected areas															
<u>Trainings for ALL</u>															
<i>Training on trade fair participation, how to approach international buyers (i.e., how to prepare for meetings, interact during meetings, negotiate, and follow-up)</i>	February-September		Activities for the exhibitors and visitors at the international trade fairs (including new companies.		■								■		
<i>Webinars /seminars on how to analyze the markets using ITC market analysis (min 1) for private companies</i>	July-August		For new companies.							■	■				
<i>Series of trainings on sustainable development, including social and environmental standards</i>	April -May		The webinars will also include EU sustainability-related regulations, such as Corporate Sustainability Due Diligence Directive and others.				■	■							
<i>Series of trainings for hazelnut producers in main technical operations in the orchard (planting, pruning, feeding, pest and diseases treatments, irrigation, harvest methods), including post-harvest</i>	March-September		Will be conducted on site of the project beneficiary company, Filbert.			■	■	■	■	■					
<i>Webinar in HACCP requirements for small (craft) fruit, vegetable and nut processors</i>	January		General webinar with practical participation, sharing obligatory documentation.							■	■				
<u>Trainings for wine sector</u>															
<i>Series of trainings on Organic Grape growing as a part of awareness rising in sustainable practices</i>	May-September		To be held in conjunction with the National University on local winery.					■	■	■	■	■			
<i>Training on Quality and Compliance: Fundamental wine defects and how to avoid them</i>	August-September		International Consultant and National University								■	■			
<i>New EU packaging requirements – ingredients, calorie content, e-labelling, and the U-label digital platform</i>	March		https://www.u-label.com			■									

Main activities and related milestones	PLANNED	STATUS	COMMENTS	YEAR 2022												
				Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	
Activity 2.2: Provide direct assistance to pilot SMEs and producers through advisory services in selected areas based on company assessment and the roadmap																
<i>Individual advisory services to SMEs to prepare for interaction with the market (min 10)</i>	January-October		Direct support, as part of trade fair preparation, to be provided by the National Project Manager.													
<i>Provide direct assistance F&V, berries and nuts processors to establish online sales on the international platforms (min 3)</i>	June-September		The companies who demonstrated interest and commitment during the trainings, will be provided with coaching and technical support on a cost sharing basis.													
Activity 2.3: Establish an information-knowledge sharing platform for SMEs and producers in each region																
<i>Establishing an information-knowledge sharing for small winemakers</i>	Sept															
<i>Establishing an information-knowledge sharing platform for hazelnut growers</i>	Feb-March		The beneficiary company Filbert and UNA agreed to consult with the small growers on a regular basis.													

Main activities and related milestones	PLANNED	STATUS	COMMENTS	YEAR 2024											
				Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
OUTPUT 3: Capacities of BSOs strengthened to provide SMEs with relevant business support services															
Activity 3.1: Conduct trainings including on-the-job trainings for selected BSOs on key areas for improvement															
<i>On the job training by involving BSOs in activities 1.1, 1.2, 2.1, 2.2, 4.2, and 4.3</i>	April-November														
<i>Training and individual consultations for BSOs, including wine associations, on how to improve service portfolio and taking strategic approach</i>	March-December		To be conducted by IC, 2 trainings within the period												
Activity 3.2: Create mechanisms for cooperation and information-sharing between Ukrainian BSOs and their foreign counterparts															
<i>Create mechanisms for cooperation and information-sharing between Ukrainian BSOs and their foreign counterparts</i>	May-October		To be achieved during the trade fairs												
<i>Information sharing event and awareness building meeting between International Organization of Vine and Wine (OIV) and wine sector representatives</i>	April-May		Support in conducting events as co-organizers												
Activity 3.3: Help selected national BSOs to become resource centers to collect, archive and share knowledge from seminars and trainings conducted under the project															
<i>To share training materials, contacts of consultants to enable BSOs to replicate events and transfer knowledge to a wider group</i>	February-October	In process	By involving BSOs in project activities												

Main activities and related milestones	PLANNED	STATUS	COMMENTS	YEAR 2024											
				Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
OUTPUT 4: Market linkages created for SMEs from fruits, vegetables, and nuts sectors to expand their sales domestically and internationally (in particular, with a focus on the EU market)															
Activity 4.1: Identify potential markets and new buyers for the target product groups															
<i>Identify potential markets and new buyers for the for nuts sector</i>	March-June		Based on the Individual Export Market Plans												
Activity 4.2: Assist pilot SMEs in preparation for trade fairs, buyer/seller events and study tours, including developing practical guides on export procedures and requirements for selected priority markets (if needed)															
<i>Prepare pilot SMEs for trade fairs and study tours (for new companies)</i>	January-October		To be provided by the ITC national consultant and the field office staff.												
<i>Assistance to improve marketing materials i.e. brochures, catalogues</i>	January-November		To be provided by the ITC national consultant and the field office staff.												
Activity 4.3: Organize participation of pilot SMEs in trade fairs, buyer/seller events, and study tours															
<i>Trade fairs</i>															
<i>FRUITLOGISTICA 2024, Berlin, Germany (7 – 9 February)</i>	January - February														
<i>GULFOOD 2024, Dubai UAE (19 -23 February)</i>	January - February														
<i>SIAL 2024, Cologne, Germany (19 – 23 October)</i>	July- October														
<i>Buyers/seller missions</i>															
<i>Sweden for processed F&V producers</i>	TBC		To be organized in cooperation with Open Trade Gate Sweden												
<i>Project Steering Committee</i>	Exact data is to be coordinated with SIDA														

Annex 6: Financial report

DESCRIPTION	Period:1 May- 31 Apr 2024			Period: May - 31 Dec 2021		Period: 1 Jan - 31 Dec 2022		Period: 1 Jan - 31 Dec 2023			Period: 1 Jan - 31 Dec 2024 ALLOCATION
	Budget TOTAL SEK (project document)	Budget TOTAL USD (project document)	Budget TOTAL USD (ACTUAL AMOUNT IN USD)	Budget	Actuals May-Dec 2021	Budget (project document)	Actuals as of 31 Dec 2022	Budget (project document)	Adjusted as of 31.01.2023	Actuals as of 31 Dec 2023	
1. STAFF AND OTHER PERSONNEL COST											
1.1 Project Management											
1.1.1 HQ based	2,913,498	342,000	299,797	114,000		114,000	106,490	114,000	105,000	110,284	60,000
1.1.2 National project manager	981,389	115,200	100,984	38,400	69,302	38,400	3,585	38,400	46,000	40,247	40,000
1.1.3 National project assistant	552,031	64,800	56,804	21,600	34,602	21,600	37,479	21,600	20,400	28,957	28,000
1.2 Consultants /advisors			0						-	-	
1.2.1 International Consultants (travel included)	4,472,475	525,000	460,215	135,000	63,481	210,000	52,371	180,000	80,000	98,133	30,000
1.2.2 National Consultants	1,584,534	186,000	163,048	60,000	38,014	66,000	21,061	60,000	60,000	22,014	28,000
Subtotal category 1	10,503,927	1,233,000	1,080,847	369,000	205,398	450,000	220,985	414,000	311,400	299,635	186,000
2. TRAVEL											
2.1. HQ based Staff	153,342	18,000	15,779	6,000	3,356	6,000	3,600	6,000	10,000	6,598	2,000
2.2. Field office staff	255,570	30,000	26,298	10,000	10,101	10,000	15,417	10,000	15,000	13,508	
Subtotal category 2	408,912	48,000	42,077	16,000	13,457	16,000	19,017	16,000	25,000	20,106	2,000
3. EQUIPMENT, VEHICLES AND FURNITURE	59,633	7,000	6,136	5,000		1,000	179	1,000	1,000	372	
Subtotal category 3	59,633	7,000	6,136	5,000	0	1,000	179	1,000	1,000	372	-
4. OPERATING AND OTHER DIRECT COSTS											
4.1 Meetings, conferences and trainings	1,703,800	200,000	175,320	60,000	8,768	80,000	5,047	60,000	60,000	10,637	10,000
4.2 Trade fairs, outgoing trade mission and B2Bs***	3,577,980	420,000	368,172	120,000	128,392	180,000	229,345	120,000	240,000	326,906	95,717
4.4 Local office	511,140	60,000	52,596	20,000	7,487	20,000	2,986	20,000	5,000	-	
Subtotal category 4	5,792,920	680,000	596,088	200,000	144,647	280,000	237,378	200,000	305,000	337,543	105,717
5. CONTRACTUAL SERVICES											
5.1 Studies, surveys, publications	340,760	40,000	35,064		6,081			40,000	2,000	-	
5.2 Evaluation (midterm, final)	596,330	70,000	61,362			25,000		45,000	45,000	13,059	10,000
Subtotal category 5	937,090	110,000	96,426	0	6,081	25,000	-	85,000	47,000	13,059	10,000
SUBTOTAL	17,702,482	2,030,000	1,821,574	590,000	369,583	772,000	477,559	716,000	689,400	670,715	303,717
PSC 13%	2,301,323	263,900	236,805	76,700	48,046	100,360	62,083	93,080	89,622	87,193	39,483
TOTAL BUDGET	SEK 20,003,804.66	\$ 2,348,140.00	\$ 2,058,378.46	\$ 666,700	\$ 417,629	\$ 872,360	\$ 539,641	\$ 809,080	\$ 779,022	\$ 757,908	\$ 343,200

***The expenditure under the " 4.2 Trade fairs, outgoing trade mission and B2Bs" is higher than initially allocated as the market linkages remains most demanded activity and all the unspent resources under other budget lines are credited to this budget line.

Annex 7: Evaluation Matrix

	Relevance		
1	Did the project respond to the correctly identified business environment constraints in line with its ability? Have the analyses and ongoing monitoring influenced decision-making and shaped activities?	<ul style="list-style-type: none"> ➤ key business environment constraints are correctly identified ➤ quality of the project's analysis in identifying the issues that prevent the target groups from benefiting from or engaging with the market system ➤ extent of correspondence of the project activities to the identified needs but with the project ability also in contributing to strengthened conditions for free, fair, and sustainable trade.) 	Triangulation of the information from desk review and KII results
2	What is the relevance of the project's approach risk management plan within the current context?	<ul style="list-style-type: none"> ➤ Extent of the validity of the identified risks in hindsight ➤ Quality of the risk management plan from the ProDoc in the light of the current environment 	Triangulation of the information from desk review and KII results
3	To what extent did the midterm evaluation of Phase I, including its lessons learned and recommendations, inform the design of the Phase II project?	<ul style="list-style-type: none"> ➤ Extent of addressing the recommendations of the MTE of Phase 1 in Phase II 	Triangulation of the information from desk review and KII results
4	What are the strengths and weaknesses related to project design, in particular the project's Logical Framework, Theory of Change (ToC) and the further development of it into operational results chains for the achievement of inclusive and sustainable trade? What can be learned to better align the project objectives and ToC to the Strategy for Sweden's reform cooperation with Eastern Europe for 2021-2027, in particular elements related to inclusive economic development?	<ul style="list-style-type: none"> ➤ Internal coherence of the project design ➤ Quality of the project's Logical Framework, Theory of Change (ToC) ➤ Extent of alignment of the project objectives and ToC to the Strategy for Sweden's reform cooperation with Eastern Europe for 2021-2027, in particular elements related to inclusive economic development 	Triangulation of the information from desk review and KII results
5	How is the project thinking about, and supporting, resilience (including the ability of newly exporting MSMEs to maintain/grow their exports)?	<ul style="list-style-type: none"> ➤ Evidence of planned activities increasing resilience to shocks and pressure (by addressing specific dimensions of fragility and their root causes) 	Triangulation of the information from desk review and KII results
6	Are the inputs adequate for achieving the planned results and intended outcome?	<ul style="list-style-type: none"> ➤ Extent of adequacy of inputs to planned results 	Triangulation of the information from desk review and KII results
7	How have in-country stakeholders, including the private sector been involved in project design, inception and implementation?	<ul style="list-style-type: none"> ➤ Extent of national stakeholders contributing to project design 	Triangulation of the information from desk review and KII results
	Coherence		

8	Regarding internal coherence, what is the level of compliance of the project with the strategic objectives of ITC (ITC core services and impact areas as set out in ITC's Strategic Plan 2022-2025) and the Swedish Embassy in Ukraine? What is the ability of project's management to establish synergies and interlinkages with relevant interventions of ITC and the Swedish Embassy in Ukraine?	<ul style="list-style-type: none"> ➤ Extent of alignment of the project with (a) the strategic objectives of ITC and (b) Sida in Ukraine ➤ Extent of additionality of the project ➤ evidence of planned partnerships with entities with complementary strengths (including ITC and Sida projects in Ukraine) to coordinate resources for joint objectives ➤ extent of complementarity within the UN family (engagement with UN Resident Coordinator offices [RCO]); 	Triangulation of the information from desk review and KII results
Effectiveness			
9	How well has the project taken advantage of the lessons learned and recommendations of the midterm evaluation of Phase I to optimize its effectiveness?	<ul style="list-style-type: none"> ➤ Evidence of building on LL from Phae 1 to increase effectiveness 	Triangulation of the information from desk review and KII results
10	To what extent has the project achieved, or is expected to achieve, its objectives, and its attributable results along the causal pathway, including any differential results across sectors and regions in the country? Can the results be distributed across different groups, (This is in line with the UN leave no-one behind policy. It is meant to encourage the evaluation to "examine equity issues and results for groups that have been marginalized, while not assuming that equity is an objective of the intervention". (OECD/DAC (2019) What are the implications for continuation?	<ul style="list-style-type: none"> ➤ Extent of the achievement of the planned results ➤ Extent of equal distribution of the results along different groups ➤ Likelihood of achieving the planned results towards the end of the project 	<ul style="list-style-type: none"> ➤ Triangulation of the information from desk review, online survey and KII results ➤ Comparison of the planned and actual results from the Logframe (results framework)
11	How performant is the project's monitoring system?	Quality of the monitoring system	Triangulation of the information from desk review and KII results
12	What is the effectiveness and efficiency of project management and partners in implementing and adapting the project to evolving challenges? Under the current circumstances of the war in Ukraine, what is its impact on the project towards reaching its outcomes? What possible adaptations and risk mitigations can be proposed, based on different evaluable scenarios?	<ul style="list-style-type: none"> ➤ Quality of adaptive management to achieve the planned results? ➤ List of factors affecting the performance ➤ Perceptions on possible future adaptation measures 	Triangulation of the information from desk review and KII results
13	To what extent has the project contributed to improved competitiveness and internationalization of MSMEs and the performance of BSOs' to provide relevant services to enterprises? (Particular attention to be devoted to the project's potential to promote stronger competitive ties with the EU.)	<ul style="list-style-type: none"> ➤ Extent of contribution of the project to improved competitiveness and internationalization of MSMEs and the performance of BSOs' to provide relevant services to enterprises ➤ Increased competitive ties with the EU 	Triangulation of the information from desk review, online survey and KII results
14	How is the project analyzing and addressing, where needed, access to finance bottlenecks for partner MSMEs (to build or sustain exports)?	<ul style="list-style-type: none"> ➤ Extent of analyzing and addressing the bottlenecks (including A2F) by the project team, 	Triangulation of the information from desk review and KII results

	Similarly, regarding partnerships or workstreams that have been closed earlier than expected, what can be learned from these experiences for the future?		
	Efficiency		
15	Are the project implementation mechanisms appropriate to achieve planned outputs and contribute to project outcomes? Are the project approach and indicators still valid, or are improvements necessary?	<ul style="list-style-type: none"> ➤ Extent of adequacy of the project implementation mechanisms and approach 	Triangulation of the information from desk review and KII results
16	Do feasible alternatives exist that can deliver similar results with the same resource? (Note that before cost-effectiveness comparisons can be made, alternatives must be identified that are genuinely feasible and comparable in terms of quality and results.)	<ul style="list-style-type: none"> ➤ Existence of feasible alternatives that can deliver similar results with the same resource 	Triangulation of the information from desk review and KII results
17	In comparison to other work in similar sectors, how does the project's impact achieved so far compare for the amount of money spent?	<ul style="list-style-type: none"> ➤ Extent of cost-effectiveness ➤ Extent of cost -efficiency ➤ To what extent has the project been adapting its 'value offer' over time? Why/why not, and how? 	Triangulation of the information from desk review and KII results
18	How does the cost for key inputs, including the use of consultants, relate to appropriate comparators? Is the number, expertise, and structure of staffing and the relationship to ITC and the national and HQ levels adequate?	<ul style="list-style-type: none"> ➤ Extent of Adequacy of staffing and management arrangements 	Triangulation of the information from desk review and KII results
19	Is the spending in line with the project budget?	<ul style="list-style-type: none"> ➤ Extent of alignment of the spending with the project budget 	Triangulation of the information from desk review and KII results
20	Has the project encountered any delays and was the planning revised accordingly?	<ul style="list-style-type: none"> ➤ Frequency and magnitude of delays due to external and internal factors ➤ Extent of adequacy of addressing the delays with revised planning 	Triangulation of the information from desk review and KII results
21	Does the project have adequate communication plan and products? How visible is the project?	<ul style="list-style-type: none"> ➤ Adequacy of communication and visibility of the project 	Triangulation of the information from desk review and KII results
22	In terms of resource mobilization and use, is there evidence of partnerships with entities with complementary strengths to coordinate resources for joint objectives?	<ul style="list-style-type: none"> ➤ Evidence of actual partnerships with development partners 	Triangulation of the information from desk review and KII results
23	What other synergies or possible overlaps have been observed, or forward-looking synergies could be developed in the future, with other related – most notably UN managed – programmes and capacities? What are the strengths of partnerships within the UN family (engagement with UN Resident Coordinator offices [RCO]; participation	<ul style="list-style-type: none"> ➤ Evidence of synergies and overlaps ➤ Perceptions on possible synergies in the remaining half 	Triangulation of the information from desk review and KII results

	in the UNSDCF and CCA, in joint programming and M&E) as well as potentially with WTO and other partners?		
	Potential impact		
24	Is the project likely to achieve its planned objectives upon completion, in particular in terms of expected benefits for ultimate beneficiaries (impact-level)? What is the likelihood that the project will contribute to the broader and longer-term national development impact?	<ul style="list-style-type: none"> ➤ Likelihood of achieving the expected objectives upon completion ➤ likelihood that the project contributing to the broader and longer-term national development impact 	Triangulation of the information from desk review and KII results
25	What is the likelihood that the project will contribute towards international commitments set out in the 2030 Agenda, particularly SDG 5 "gender equality", SDG 8 "promoting sustained, inclusive and sustainable economic growth, full and productive employment", SDG 9 "industry, innovation and infrastructure", and SDG 12 "responsible consumption and production"?	<ul style="list-style-type: none"> ➤ likelihood of the project contributing towards SDGs (particularly SDG 5 "gender equality", SDG 8 "promoting sustained, inclusive and sustainable economic growth, full and productive employment", SDG 9 "industry, innovation and infrastructure", and SDG 12 "responsible consumption and production") 	Triangulation of the information from desk review and KII results
26	At midterm, can any unintended positive or negative effects already be observed as a consequence of the project's interventions?	<ul style="list-style-type: none"> ➤ Extent of the already observable impact 	Triangulation of the information from desk review, online survey and KII results
27	What is the most and least valuable type of support offered by the project? Why?	<ul style="list-style-type: none"> ➤ Perception of the most and least valuable type of support offered by the project by the MSMEs and the BSOs 	
	Sustainability		
28	How effective has the project been in establishing national ownership?	<ul style="list-style-type: none"> ➤ Extent of national ownership 	
29	Are the project results likely to be durable and anchored in national institutions? Are government and related national institutions likely to maintain the project financially once external funding ends? Will access to the benefits generated by the intervention be affordable for the beneficiaries over the long term? Are national partners able, willing, and committed to continue building on the systems enhanced by the project?	<ul style="list-style-type: none"> ➤ Likelihood of the project outcome being durable ➤ Extent of financial risks to sustainability 	
30	Has the project prepared for an exit plan to ensure a proper hand-over to the national government and institutions after the project ends? Under the current circumstances of the war in Ukraine, what possible exit strategies can be proposed, based on different evaluable scenarios?	<ul style="list-style-type: none"> ➤ Evidence of the existence of an exit plan ➤ Perceptions regarding possible exist strategies given the current circumstances 	
31	Does the project increase resilience to shocks and pressure (by addressing specific dimensions of fragility and their root causes)?	<ul style="list-style-type: none"> ➤ Evidence of activities increasing resilience ➤ 	

32	How does the project measure progress towards sustainability and scale, achievements and lessons learned to date?	<ul style="list-style-type: none"> ➤ Evidence of (planned) activities increasing likelihood of sustainability and scaling up 	
33	What options exist for possible support to MSMEs to facilitate access to finance (investor engagement, accessing working capital, etc.)?	<ul style="list-style-type: none"> ➤ Perceptions on the options for possible support to MSMEs to facilitate access to finance 	
34	How will the impacts and the mechanisms to achieve these impacts continue after funding for the project has ended so that more and more people will continue to benefit from the intervention? Note that according to a 2018 evaluation of Sida's market systems development approach , Sida has mainstreamed an Inclusive Market Systems Development approach across its portfolio, encouraging all contributions to consider these aspects of sustainability. It emphasizes that as well as being a tool for accountability, RBM should be used to inform ongoing learning and adaptation (e.g. by applying the DCED Standard for Results Measurement). The DCED Standard is a framework that aids projects to clearly state the hypothesis and set indicators that are monitored regularly to demonstrate whether events are going according to plan	<ul style="list-style-type: none"> ➤ Likelihood of sustainability of the impact including the spread for different groups ➤ How does RBM support in measuring the likelihood of the above 	
Cross cutting			
35	To what extent does the project contribute towards cross-cutting issues including human rights and gender equality (human rights, democracy, the rule of law and gender equality); inclusion of youth (peaceful and inclusive societies); green growth (environmentally and climate-resilient sustainable development and sustainable use of natural resources); and social responsibility (inclusive and economic development)? Note that the objectives set out in the Strategy for Sweden's reform cooperation with Eastern Europe for 2021–2027 include human rights, democracy, the rule of law and gender equality; peaceful and inclusive societies; environmentally and climate-resilient sustainable development and sustainable use of natural resources; and inclusive economic development. Development markers set out in ITC's Mainstreaming sustainable and inclusive trade Guidelines for ITC projects include gender equality; inclusion of youth; green growth, and social responsibility – including human rights	<ul style="list-style-type: none"> ➤ Extent of contribution of the project to issues of human rights and gender equality (human rights, democracy, the rule of law and gender equality); inclusion of youth (peaceful and inclusive societies); green growth (environmentally and climate-resilient sustainable development and sustainable use of natural resources); and social responsibility (inclusive and economic development) 	

Annex 8: List of Persons Interviewed

Government of Ukraine

1. Director of the Department for Agrarian Development, Ministry of Agrarian Policy and Food of Ukraine
2. Deputy Director, Entrepreneurship and Export Promotion Office of Ukraine
3. former Director of the Department of Agriculture Development and Irrigation, Kherson Regional State Administration
4. Director, V. Ye. Tairov Institute of Viticulture and Winemaking

ITC

5. Programme Coordinator, Office for Eastern Europe and Central Asia,
6. National Project Manager
7. Administrative Assistant
8. Chief, Office for Eastern Europe and Central Asia (OEECA),
9. Project Manager, Trade and Market Intelligence for the Eastern Partnership Countries project

NGOs

10. First Vice-President, Dnipropetrovsk Chamber of Commerce and Industry
11. Chairperson, Ukrainian Agricultural Export Association
12. Head of the Board of Roads of Wine and Taste of the Kherson Region, Owner of Palichevi Farm
13. President, Ukrainian Nut Association
14. Chairperson of the Association of Black Sea Wine Craft Producers, Co-owner of Slivino Winery
15. Chairperson, Association of Gardeners, Grape Growers and Winemakers of Ukraine (UKRSADVINPROM)
16. Head of the Agriculture Entrepreneur Committee, Ukrainian Chamber of Commerce and Industry
17. Chairperson of the Association of Craft Winemakers of Ukraine and Executive Director of Beykush Winery
18. President, Ukrainian Berries Association
19. President, Ukrainian Horticultural Association
20. Director General, U-Food Association
21. Project and MEAL Manager, Safe Economic Environment for Rural Women – Security and Peace for All project financed by UN Women's Peace Humanitarian Fund and implemented by UN Women and PU Rural Women Business Network
22. President, National Association of Agricultural Advisory Service

National Consultants

23. NC on GlobalG.A.P.
24. NC on business development
25. NC on Communications and PR
26. NC on Communications and PR

International Consultants

27. Strategic expert on the development of the nut sector in Ukraine
28. IC on wine tourism
29. IC on hazelnut cultivation and pruning
30. IC on Viticulture and Grape Wine Production Technique

SMEs

31. Co-Owner, Winery of Maryan and Nataliya Shevchenko
32. Owner, Don Alejandro Winery
33. CFO, Sadi Donbassa LLC
34. Director General, Big Wines
35. CEO, Lvivskyi Sad
36. Director, Vesta-Leader Ltd.
37. Head of Production, First Winemaking Station
38. Consultant, Wine Idea
39. Director, Filbert LLC
40. CEO, Danube Agrarian Ltd
41. Director, Vol-Nat LLC
42. Head of Export, Nutsee LLC
43. CEO, Fruitlife LLC (Almafruit TM)
44. CCO, USPA
45. Director, Armoprom-D LLC
46. Manager, Yasmina Nuts
47. Production Assistant Specialist, Sadyi Dnepra LLC (UApple TM)
48. Director, Sofia Nuts LLC
49. Director, Power of Nature LLC
50. Export Manager, Farm GADZ
51. Deputy Director, Poltava-Sad LLC
52. Production Director, Eragro LLC
53. Manager, Aurora LLC
54. Director, Fruzbi Ukraine LLC

Development partners

55. International Consultant, ERA project, USAID
56. QFTP project, SECO
57. CFIC Economist, FAO
58. Creative Industries Specialist, USAID Competitive Economy Program Ukraine (USAID CEP)
59. Expert Sourcing + Markets, IPD – Import Promotion Desk
60. Senior Programme Manager and Strategic Communication, Sida
61. Controller, Swedish Embassy Kyiv

Other

62. Export Promotion Center

Annex 9: Online Survey Questionnaire

Dear Project Beneficiary,

The International Trade Centre (ITC) is conducting an independent midterm evaluation of the project “Linking Ukrainian SMEs in the Fruit and Vegetables Sector to Global and Domestic Markets and Value Chains” Phase II, which is funded by the Swedish International Development Agency (Sida) and covers four target sectors, namely fruits, vegetables, nuts, and wine.

The evaluation will help to identify the aspects of the project that have worked well and others that may need to be improved in the second half of the project.

The following questionnaire aims to obtain your feedback in your capacity as project beneficiaries. The questionnaire will be sent to all micro, small and medium-sized enterprises (MSMEs) and business support organizations (BSOs) participating in the project.

The senior management should preferably complete the questionnaire. All responses will remain confidential and only be seen by the ITC Independent Evaluation Unit (IEU).

We kindly ask you to complete this questionnaire before 27 January 2024. The questionnaire should not take more than 15 to 20 minutes. Your opinion matters to us, and we kindly request that you provide open and honest answers that accurately reflect your experience with the project.

Your support and input will be greatly appreciated. Thank you

ITC Independent Evaluation Unit

1. What region(s) do you work in? (Multiple answers are possible)

- Cherkasy Oblast
- Chernihiv Oblast
- Chernivtsi Oblast
- Dnipropetrovsk Oblast
- Donetsk Oblast
- Ivano-Frankivsk Oblast
- Kharkiv Oblast
- Kherson Oblast
- Khmelnytskyi Oblast
- Kyiv Oblast
- Kirovohrad Oblast
- Luhansk Oblast
- Lviv Oblast
- Mykolaiv Oblast
- Odesa Oblast
- Poltava Oblast
- Rivne Oblast
- Sumy Oblast
- Ternopil Oblast
- Vinnytsia Oblast
- Volyn Oblast
- Zakarpattia Oblast

- Zaporizhzhya Oblast
 - Zhytomyr Oblast
2. In which category is the organization/institution you work for?
- Chamber of Commerce
 - Business Association
 - Micro, Small, or Medium-sized Enterprise (MSME)
3. How many staff are currently employed in your organization/institution?
- 1 to 5
 - 6 to 10
 - 11 to 25
 - 26 to 50
 - 51 to 100
 - 101 to 250
 - Over 250
4. Which type of events, activities or support from ITC have you participated in or received? (more than one option is possible)
- Collective training sessions, seminars and/or workshops (online or in-person)
 - E-Learning (webinars)
 - Study Tours
 - Working Groups
 - Mentoring (longer-term informal relationship-based training intervention)
 - Coaching/consulting (shorter-term well-planned task-oriented and structured training intervention)
 - On-the-job training (structured training within the workplace aimed at imparting specific knowledge or skills for the employees to perform their job effectively, e.g. practical workshops, master-classes, etc.)
 - Learning-by-doing (more informal and spontaneous process of acquiring knowledge and skills through direct hands-on experience not always following a predefined training plan but happening naturally as individuals engage in practical tasks and problem-solving)
 - All of the above
 - None of the above
 - Other (please specify in next question)
5. Follow-up on question 4: If you responded "Other" to question 4, please specify here.
-
6. What is your general degree of satisfaction with the type of support received from ITC in relation to your work?
- Highly satisfied
 - Somewhat satisfied
 - Barely satisfied

- Somewhat unsatisfied
- Highly unsatisfied

7. Please provide comments, details or explanations related to your answer to question 6.

8. In your opinion, to what extent are the ITC project activities aligned with your institution's/company's needs and priorities?

- High
- Medium
- Low
- Hardly at all

9. Please provide comments, details or explanations related to your answer to question 8.

10. To what extent has the ITC project complemented other support that your organization/institution might have received/been receiving?

- To large extent
- To some extent
- To a minor extent
- Hardly at all
- No other assistance has been received

11. Please provide comments, details or explanations related to your answer to question 8, clarifying other assistance that you might have received/been receiving.

12. In your opinion, to what extent does the ITC project have the necessary operational capacity to support MSMEs' enhanced market linkages in a timely manner?

- To large extent
- To some extent
- To a minor extent
- Hardly at all

13. Please provide comments, details or explanations related to your answer to question 12.

14. To what extent has the ITC project contributed to the capacity building of your organization/institution?

- High
- Relatively High
- Relatively low
- Low
- Hardly at all

15. Please provide comments, details or explanations related to your answer to question 12.

16. What makes ITC support unique that you most appreciate? (Multiple answers are possible.)

- Delivers concrete and visible results that make a difference in terms of strategic organization preparation and implementation of related activities
- Facilitates access to international and national expertise
- Enables networking with other MSMEs and BSOs both in Ukraine and abroad
- Contributes to Ukraine's business internationalization Contributes to the professionalization of Ukraine's BSOs
- Contributes to Ukraine's visibility and credibility in trade relations Contributes to the development of Ukraine's domestic consultancy market Offers a serious opportunity to train the staff of your MSME or BSO
- Offers a real opportunity to promote and or enhance the image of my MSME or BSO Provides adequate skills in trade-related issues
- Provides access to EU and global markets
- Provides long-term business opportunities and linkages
- Provides adequate support in establishing partnership/dialogue with the business sector in the EU
- Provides direct guidance in defining and prioritizing possible solutions for improving the economic conditions in your MSME or BSO
- None of the above
- Other (please specify in next question)

17. Please provide comments, details or explanations related to your answer to question 16.

18. Has the ITC project contributed to improving any of your work processes?

- To large extent
- To some extent
- To a minor extent
- Hardly at all

19. Please provide comments, details or explanations related to your answer to question 18.

20. In your opinion, has the ITC project contributed to increasing the sales volume of your company / Ukrainian MSMEs in the fruits, vegetables, nuts or wine sector(s) at the national level?

	To large extent	To some extent	To a minor extent	Hardly at all	I do not know
Fruits Sector					
Vegetables Sector					
Nuts Sector					
Wine Sector					

21. Please provide comments detail or explanations related to your answer to question 18.

22. In your opinion, has the ITC project contributed to increasing the export volume of your company / Ukrainian MSMEs in the fruits, vegetables, nuts or wine sector(s)?

	To large extent	To some extent	To a minor extent	Hardly at all	I do not know
Fruits Sector					
Vegetables Sector					
Nuts Sector					
Wine Sector					

23. Please provide comments, details or explanations related to your answer to question 22.

24. In your opinion, to what extent are the changes you have made through ITC support likely to continue after the ITC intervention has stopped?

- Highly likely
- Somewhat likely
- Unlikely
- Highly unlikely
- Too early to tell

25. Please provide comments, details or explanations related to your answer to question 24, in particular explaining how the changes will continue, if that is what you think.

26. Since ITC is pursuing sustainable development, we would like to know the following: did the ITC project help to improve any of the following related to your work? (More than one option is possible)

- Gender equality / women's empowerment
- Engaging youth
- Environmental concerns
- Corporate social responsibility
- Not at all
- I do not know

27. Please provide comments, details or explanations related to your answer to question 26.

28. In your opinion, what should have been included in the ITC project, that currently is not or is in a limited scope? (More than one option is possible.)

- To provide access to finance via its own credit facility
- To provide assistance with access to finance for example business planning, due diligence procedures, credit application forms, etc.

- To provide more systematic structured advice on follow-up issues likely arise after project events, like trade fairs
- To provide more visibility support for the project results (in relation to SMEs/Business Associations Chambers of Commerce)
- To provide more opportunities for policy dialogue with Ukraine 's relevant national and regional authorities
- To create an online platform for information- and experience-sharing in the four target sectors (fruits, vegetables, nuts and wine)
- To be more inclusive in relation to gender equity, engaging youth, environment/climate change
- None of the above
- Other (please specify in next question)

29. Follow-up on question 28: If you responded "Other" to question 28, please specify here.

