Vincenzo Panettieri

(Bees value chain Expert)

Report of the mission in Kosovo

(20 – 31/05/2013)

- Mainlines (mission specifications)
- Activities and results
- The follow-up
- Diary
1. Mainlines

1.1. Mission specifications

Duration: 20 – 31/05/2013 (12 days)

• With regard to the territorial system subtended by the geographic area of the Municipality of Dragash (Republic of Kosovo), in the frame of the extension of the Grant Service Contract1 established between UNDP-Kosovo and Eurada,
  - on the basis of the actual knowledge2 related to the territorial Bees value chain,
  - according to the strategic guidelines3 shared with the local actors of the value chain,
  - with the aim of implementing the strategic intervention4 BEIPB01,
  - in consideration of the needs of quickly improving the skills of the local actors of the value chain,

acquiring an adequate set of information in order to elaborate a Calendar/map, a Survey of the sustainable productions and a Training Plan for the beekeeping activities of Dragash.

Target

• Carrying on a technical scientific assessment, coherently with the target of the mission.

Activities

• Identifying local beekeepers training needs.

• The activities must be carried on through involving as much as possible the local actors (producers, administrations, service providers, etc.), with a triple aim:
  - to generate awareness on the importance of the “territory as resource per se” for a sustainable development,
  - to generate “ownership” towards common problems and common solutions,
  - to induce practices of joint cooperation.

Boundary conditions

• The definition of the sustainable potentialities and of the constrain’)s of the value chains has also to take into consideration the needs of improving the service system for supporting the local economy, in function of the existing delivery capacities and emergent new demand.

• Acquisition of an adequate set of information in order to elaborate:
  1) a Calendar/map and a Survey of the sustainable productions for the beekeeping activities, through identifying and describing, in qualitative and quantitative terms, the biodiversity of beekeeping interest (kinds of bees pastures, their extensions, their pollen/honey-dew productivity) related to the different ecosystems of the geographic area of Dragash, in order to evaluate the possibilities of sustainably increasing the global quantity of production of meadow (spring) and mountain (summer) multi-flower kinds of honey, the variety of production (mono-flower honeys, other kinds of valuable multi-flower honeys, honey-dew), and the general quality level of the products;
  2) a Training Plan for beekeeping activities, to be implemented during the next mission of the expert in Dragash.

Expected results

• Definition of follow-up activities.

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1 The GSC is aimed at providing the ILS LEDA services at support of the for Project “Conservation of biodiversity and sustainable Land use Management in Dragas”, with the objective of improving the performance of the economic system in the Dragas Area, in terms of capacities, productivity, competitiveness, business, markets.
2 See the “Survey of the Resources of Dragas” updated to 19/10/12.
3 See the “1 level Strategic Guidelines for the Bees value chain”.
4 See the “Integrated Projects for the Bees, Forest and Herbs value chains”.

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2. Activities and results

2.1. Organization of the operational activity

2.1.1. The area of interest

The area of interest of the activity is constituted by the geographic area of the municipality of Dragash (South Kosovo).

2.1.2. Methodological approach

The activity has been carried on through an action-research process aimed at identifying:
- the actual productive characteristics and conditions of the Bees value chain of Dragash,
- the kinds and the conditions of the existing ecosystems considered as sites of bees grazing areas,
- the basic training needs of the local actors.

2.1.3. Operational organization

In order to accomplish the targets of the mission, the action-research have been carried out through the accomplishment of adequately focused
- Field Surveys,
- meetings with local and extra-local actors,
- preliminary training activity,
- desk analysis in real time.

The complete and organized diary of the activities accomplished during the mission can be found in the last two pages of this report.

2.2. Implementation of the operational activity

2.2.1. Field Surveys and meetings with local and extra-local actors

a) Tasks

Target: knowing, examining, assessing.

Regarding the local productive processes and methodologies:
- ecosystems and grazing areas;
- consistency of placements;
- farming methods, type of hives;
- technical skills, professional attitude;
- herd health management;
- technological level of primary and secondary stages;
- existence and state of repair workshops and warehouses.

Regarding the marketing issues:
- quality of production;
- sales volumes;
- sales channels;
- approach to the market and promotional needs.
Regarding the national policies:
• check the interest and willingness of the national government to support the sector, providing it with a law of consumer assurance, production development, greater transparency of the market, through a dedicated meeting with Representatives of the Agriculture Ministry.

Regarding the context and the Harmonization:
• better understand the business environment of the extra-territorial sector, through visits to other laboratories or companies, even related to the beekeeping sector;
• identify and learn about other intervention policies in favor of the sector for harmonizing them through brief meetings with other organizations operating in the territory in beekeeping.

b) Productive processes and methodologies - Marketing issues

• Activity

Eight producers, owners of about 450 hives, were visited. Were examined by sampling about 40 hives. Each beekeeper was asked in colloquial form to answer questions relating to types of farming, types of production, main blossoming, harvest periods, honey quantity collected, methods of extraction, storage, preservation, sale, critical points and prospects of development.

The weather conditions have often been an obstacle to more detailed visits. The defections of some beekeepers, sometimes in the time immediately preceding the same visit, they represented a further obstacle to the implementation of the agenda.

The activity of field surveying has been a good occasion for the identification of the kinds of bees grazing areas.

• Results
  - Ecosystems and grazing areas.

    The visited areas are characterized by the presence of natural ecosystems vast and strongly positive for bees and beekeeping. The bees themselves can enhance and amplify the scope of their ecosystem service through the pollination action on botanic species visited to collect the nectar.

    During the period of the mission were detected, among plants in blossoming: Fabaceae (Robinia Pseudoacacia, Medicago S.) Trifolium spp, Lamiaceae (Lamium, Thymus spp, Mentha spp.), Rosaceae (nectariferous), Asteraceae (Taraxacum O.).
- Consistency of individual workstations.

  Beekeepers, except a few, place all the hives into a single location, usually near their home. The placements are often located in impervious sites, difficult to reach and limiting for any transport or shifting of materials (beekeeping equipment are characterized by size or weight). Then beekeepers do not deviate from the traditions of other countries.

- Methods of breeding, type of hive.

  Methods are traditional; in some cases they are related to personal systems not always logical in terms of production; anyway, with the exception of some singular cases, systems are not deleterious or harmful to the production. The hives most used are type "Langstroth". Less used the hives type DB (Dadant Blatt) characterized by the highest volume (and higher capacity) of the nest (see Figure 2).

1 - Clockwise: growth cluster near an apiary (ranunculaceae (buttercup), borraginaceae, composites, Brassicaceae); Medicago S. in blossoming; microsporangia formation in Pinus, hives in a wide area of conifers on the border with Albania (Koritnik).
The Langstroth hives are characterized by having the nest and the supers (the last one for the collection of honey for human consumption) of equal volume. This similarity allows to safely move bodies and combs for obtaining honey or bees depending on the season or the needs; the presence of "brood" (eggs and larvae) in honey combs, widespread technique among beekeepers in Dragash, is not permitted by European standards and in particular by the Organic Honey EU Regulation.

- Technical skills and professionalism

Technical skills are good. The general knowledge of bees behaviors, the management of beehives can be considered acceptable.
Other practices can be improved; some of them will have to be excluded, in order to achieve better results, without changing the traditional connotations of the activity.

The level of professionalism is still very low. The arrangement of the apiaries, of hives in the apiary, the lack of basic tools: the need for “savings at all costs” adversely affects the work efficiency.

To the left: even the old or damaged combs are stubbornly offered to the bees at the expense of productivity of the colony and increase of health risks. 
At the center: a knife - a tool too short, dangerously fragile and too sharp – works instead of the lever detacher honeycombs (right)
- Health management

The visited beehive did not show cases of disease particularly dangerous. Varroasis, with some exceptions negligible in clinical as epidemiological terms, it does not seem, at least at this stage of the season, scoring negatively families.

The anti-Varroa products are used without a complete knowledge of the facts. The active principles are the same circulating in the EU; sometimes are used supply methods, particularly pollutants considered illegal in the EU.

There is not knowledge and practice of innovative systems with low or no pollution impact for honey and for the environment. Systems of this type, which imply greater dexterity and greater compliance with "organic" criteria, are suspiciously considered.

- Degree of technological secondary phases and subsequent

The care for the honey production stops at the extraction phase. The honeycombs are transported to locals (rooms) improvised as needed, even inside the house, and then centrifuged. The systems of cleaning and filtering of honey are often coarse or absent. Packaging systems are entirely "home-made" and empirical.

The containment of honey occurs into glass jars or plastic for food but also in any other type of container: metal or plastic which originally have already contained other matters, even non-food substances.

- Existence and state of repair workshops and warehouses

It was not possible, except in one isolated case, visit laboratories and / or storage warehouses or locals for the only honey. When existing, the rooms have not any guarantee of hygiene and food safety.
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- Quality of production

Honey, currently the only local beekeeping production, presents visual and coarse defects: fractions containing wax or other foreign material such as pieces of bee etc ... In the mass of honey can arise air bubbles that, due to the density, remain in it by altering both the visual appearance that the processes of crystallization; when the lower viscosity makes it possible the outcrop of the air bubbles, are formed surface foam.

There are no analytical data on the values of the main physical and chemical parameters and melissopalynological characteristics of local honeys.

Fig.8 – Local where permanently stay machineries and equipment for extracting and working honey. Clock-wise: local view, kg 50 honey container, decapping banquet, centrifuge basket and “home” containers for honey.

Fig.9 - A sample of honey presenting severe visual defects and impurities derived from the absence of banal tricks finishing. A filtration process implemented with simple, but adequate tools, immediately improve the level of appearance and shelf life of the food.
- Sales volumes
  The average production per hive is declared around 15 kg. The honey produced is completely sold.

- Sales Channels
  The honey is sold directly by beekeepers. Customers are individuals or small local retailers who know the producer.
  There is not existing a real wholesaling operation. Some beekeepers reported having extra-domestic buyers (Macedonia and Turkey).
  The chain currently existing can be defined as "short" one.

- Sale prices
  The sale price is around 8/9 euro per kilo.

- Market approach, promotional needs
  Beekeepers show satisfaction with the current market conditions. All of them say they always sell all their product and the request level is higher then their production possibilities. They do not seem interested in carrying out specific actions to value of the product, do not show particular attention to obtaining quality certifications, the readying of commercial lines, the creation of "brand" for their productions.
  It is finally absent the awareness of the supply chain; nor any beekeeper is expressed on opportunity to create one of quality.

c) National policies

  - Activity and results
   An inadequate law is currently in force in Kosovo: it is contradictory and in some phrases disadvantageous for the category should protect.
   It was assessed useful to know what guidelines and policies the Ministry of Agriculture had for the sector. It was then asked, and obtained, a meeting in Pristina with Mr. Arsim Memaj Head of Animal Production Division of the Ministry of Agriculture of Kosovo.
   The Kosovar beekeeping sector is defined by 70,000 hives owned by about 6,000 beekeepers with an average production of 15 kg per hive. Only 10 producers (1,75\%\textsubscript{0}) possess more than 300 hives throughout the country.
   The Ministry seems willing to allocate € 300,000 per year for the sector.
   The current law should be subject to revision and implementation. After an exchange of views on some of the main issues (rules to define the sector and rules for defining product-standards) Mr. Arsim Memaj invited UNDP to actively participate in the discussion of the new law. The director has promised to send to the office of UNDP Dragash the existing text of the law and drafts on which you are working.
   Furthermore, a meeting at the Kosovar Agency for Standardization has not produced interesting results for the project in its current phase.

d) Context and harmonization

  - Activity and results
   - Visits to other laboratories/companies, even related
     On the morning of 28/05 has been visited a shop of reselling equipment and tools for beekeeping.
     In the city of Peja was held a meeting with local beekeeping enterprise. The company manages about 500 hives, yearly produces 10 tons of honey and 1.500 "queens" species *Apis Ligustica Carnica* for sale, uses two voluntary corporate certifications (HACCP and ISO), attends in international fairs in Italy, Austria, Croatia, has its own line of products labeled and edits its promotional material.
   - Meetings with other NGOs
     Meetings were held in Prizren with Mr. Basri Pulaj of Helvetas and Driton Sahatqiu of Caritas Kosovo for a discussion about methodologies employed as an approach to the problems of beekeepers in Dragash and about concrete measures from these organizations played.
     Aside from the testimony of their commitment, no specific points of possible synergies was revealed.

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2.2.2. Preliminary training activity

a) Tasks

Target: knowing, assessing, training-sharing.

Regarding the openness of the local actors toward to the change and the innovation:

- verify the degree of sensitivity and interest in the issues presented and, more generally, the degree and quality of the needs and constraints, expressed and not, through discussion meetings with beekeepers;
- assess the availability to start an enhancement production-process, through analysis of the production cycle,
- assess the capacity to achieve the product certification, through discussion and meetings with beekeepers.

Regarding the needs of consciousness raising:

- show significant aspects of the organization of the beekeeping sector related to the productive diversification and to the approach to the market;
- furthermore, highlight the competition solicitations and the innovative dynamics related to those aspects.

b) Change, innovation, consciousness raising

- Activity
  
The contents of the training have been related to the following issues:
  
  I. market structure, factors that influence the price trend;
  II. associations as a source of services for producing and professional improvement;
  III. strategic issues for a honey promotion policy;
  IV. basic concepts on systems for disease control with particular reference to varroasis.

- Results
  
The training was an opportunity to have an exchange of ideas with local producers and receive impressions of current needs and future approaches.
  Rather than worry about the market, over which they did’nt express significant opinions, showed some interest in an orientation school, trainings and technical updating in beekeeping.
  Beekeepers also showed interest in the issues related to the diseases: Varroa, comparing fighting methods, comparison of the various active principles used in this regard.

2.2.3. Desk analysis in real time

a) Desk analysis in real time

Target: knowing, verifying, assessing.

- Activity
  
  In order to assess and verify in real time the information gathered, a daily activity of desk analysis has been carried on.

2.3. Conclusions

2.3.1. Considerations

The frame situation, as far as examined, it is quite complex; some gradual and measured interventions could lead to the completion of a value chain; whatever its degree of complexity, it could be fully integrated and homogenized.

A scarcely Utilized competitiveness

Beekeepers in the immediate, should definitely take better care of stages after primary production (production in the field).
The honey in fact after the admittance in "laboratory" and the extraction (phase inevitably delicate: it should not be overlooked) is literally abandoned to his fate.
In fact, the product, even when superficially sensory-analysized, shows aspects of great value: pleasant aroma, flavor reminiscent of the plant nectar; but serious visual and olfactory defects are also found in (waxy particles, smoke odor/ flavor due to its excessive use in the process of supers subtraction).
The absence of any analytical reference on the physical and chemical parameters prevents to express any evaluation of the product in terms of quality. However, for what has been possible to see, the product should not have, in this respect, serious difficulties. It is existing the uncertainty of residuality: a not perceived problem which, for that reason, should be underestimated.
Beekeepers are firmly anchored to their tradition of production and they are rightly proud. This attitude hampers the evolution of the sector towards real market expansion and product promotion policies.

### Chances for increasing the variety of the honey products

The wildflower honey is the product par excellence. The geo-botanical structure of territory probably does’nt allow another else. Moreover schedule and unrealized visits, meetings agreed and then disregarded did not help to clarify this issue. However in some areas on the border with Albania, certainly there are areas dedicated to the production of honeydew (hones from conifers), very welcome in Germany and Austria which now constitute the largest share in the tourist sector and are the major European consumers of this type of honey.

### Resistances to change

Despite having mentioned these aspects and put forward some project assumptions, the response was very lukewarm.
They believed in good faith they can not do otherwise and the only possible production is the current one. Never seasonal collections had been carried out. The diversification, requested by some of them does not seem substantiated by a convinced professional need.

### 2.3.2. Avenues and perspectives

#### Using the tradition

This rootedness in tradition that seems to dampen the immediate development of beekeeping in Dragash is, in fact, if properly managed, the winning element.
An aspect so strong and so clearly expressed could also lead to the acceptance of particular strategies of enhancement.

Today it seems difficult to orientate beekeepers towards objectives and strategies that would require also changing their production practices (production of mono-floral hones, organic production, etc…). But beekeepers could also be oriented towards innovative addresses, provided they are clearly linked to the territory of which they are quite rightly proud.

Innovative processes could be related to the development of productions value through a policy of geographical region typing; in this way the distrust of the “new” (anyway: product certification and new forms of promotional communication would be compulsory) could best be overcome. At least, the inclusion in a “basket” involving other categories could further encourage the modernization of the beekeeping sector.

The implications of this process are binding. We should first proceed with in-depth surveys such as chemical and physical analyses useful in defining the “range” of the qualitative parameters. So we should start a study of botanical and geographical characterization through the analysis of pollen and continue with the creation of a “Chart” describing product in sensory terms. Only at this step could be investigated promotional line through which the product can achieve new market share.

On this road, however, are already moving Kosovar beekeepers of other territories and districts.
Beekeepers in Dragash should immediately catch up in relation of their compatriot fellows.
3. The follow-up

3.1. Actions to be carried on

3.1.1. The actions on products/processes

a) Productive perspectives


A part of the Pinus spp, none of the species viewed in the period of the mission is present in sufficient quantity, or located in sufficiently large areals, to allow the production of mono-floral honey. However, the wildflower honey coming from these blooms is certainly a very high value and can be classified as "mountain spring honey."

The presence of large and compact ranges of conifers mainly in the southern area adjacent to the lands of Albania may instead provide immediately to the production of honeydew honey (pine or fir). A dark honey, aromatic, strong flavor, almost always liquid, with lower content of reducing sugars than nectar honeys with significant presence of mineral salts. Much loved, great value, not to be confused with other honeydew honeys of lower sensory value. Its production, from the proceeds from the limited information received, is at the top or late summer. Like, more or less, everywhere in our latitudes and in our climate.

Therefore, significant reasons of competitiveness can be find in order to justify a succession of actions (both of involvement of the local actors and of productive assessment and control), aimed at elaborating a "characterization format" having, at the same time, scientific, productive and promotional purposes: the Survey of Dragash Bees, in which the identified kinds of honey are listed with their organoleptic and nutritional properties and their times and places of production (the "calendar/map").

These actions that, in a future, if opportune, could be extended also to the not-honey bees productions, should be:
- involvement of beekeepers interested in the enhancement process,
- identification of one or more placements according to criteria of bee productivity and botany territorial significance,
- phase control of breeding and harvesting (by bees),
- control of the stages of collecting (by beekeepers), extracting and processing in the laboratory,
- analytical tests (chemical and physical parameters and pollen analysis),
- recording data and their evaluation.

A characterization study of this type, in principle, has a minimum duration of three years, must always be carried in the same territory, it must record the presence of any crops or anthropogenic modifications which may affect the determination of the pollen spectrum in studying that one.

In order to support optimized increase and improvement of the Bees value chain, the Survey of Dragash Bees is a really useful tool. A format of it, fulfilled with the first results of this kind of action-research carried out until now, will be released within the 30/06/13.

- Short/medium term actions.

The beginning of effective interventions influential on the products / processes in the medium term requires only few preliminary and preparatory actions, among which also the training activity, described as follows, should be listed.

b) Training activity

The Training Plan for the beekeeping activities of Dragash will be released within the 30/06/13.

It substantially consists of the following issues.
I. Basic training

• Issues
  Bee biology, breeding techniques, production of new colonies (swarming natural and artificial), beekeeping production from the field to the hive (honey, royal jelly, pollen, propolis), introduction to main health problems of bees and general principles of bee pathology.

• Aims
  The Bees value chain represents a very strong opportunity of relatively easy production of employment at a very low specific cost. Therefore, the basic training, whose beneficiaries should be young, selected, motivated people, is aimed at obtaining very quick impact effects on the employment and average income characterizing the territory of the Municipality.

II. Production of quality honey

• Issues
  Practices in the field, main physical and chemical properties of honey, quality parameters, technology, storage and preservation.

• Aims
  The purpose of the training will make beekeepers aware of what are the qualitative characteristics of honey, what are the actions and conditions that guarantee the respect and which result in its deterioration. These issues are the central node through which pass all other actions (from farming techniques to the arrangement of a laboratory, technologies for processing, marketing and promotion). Beekeepers must become aware that the laboratory, far from being a “place of luck” to extract honey, is the strategic place where is settled the fate of the product. A modest supply of filters "sack" and ripening small help understanding what is proposed in practice.

III. Good practices

• Issues
  Production following GMP (Good Manufacturing Practices) and HACCP (Hazard Analysis Critical Control Points).

• Aims
  It is needed to develop a planning-map of the honey processing and cover all stages of that one. The beekeeper must attribute to the process a strategic value and not consider it only a utility. Honey is much more durable than meat or cheese to microbiological attacks; anyway it’s equally true that the absence of pollutants, healthy, hygiene, cleaning and inspection of the manufacturing process are now required and deemed fundamental in any operation in the food industry. The arrangement of this part also allows greater design capability useful for the preparation and activation of a laboratory also in terms of installation.

IV. Bees pathology

• Issues
  Varroasis, American fool brood, Nosemose, CCD. Conventional, integrated, biomechanical therapies.

• Aims
  Not always the use of therapeutic preparations coincides with the proper awareness of their use. The correct use of medicines can prevent problems of drug resistance, pollution problems of the product, image problems; aspects which would become immediately a market problem.

V. Organization

• Issues
  Forms of organization e cooperation in beekeeping

• Aims
Illustrate complex and simplified forms of organization of producers. A process chain in beekeeping without a strong “rural” and territorial connotation does not get results: in terms of quality, increased consumption, income of the producers themselves. A simple form aggregative, primordial type and pure defense of interest, is not enough. Beekeepers must start from these levels only for moving towards forms of association able to develop and propose policies of interest and involvement of the consumer. Complex shapes to attack, by more advanced ways, competitors existing or entering into the Market.

VI. Territorial characterization

- Issues
  Territory certification: analytical methods, strategic aims.

- Aims
  Concretely explain the steps and effort required to create a valuation process. Sampling, analysis, data cataloguing, evaluation, disciplinary (internal rules), brand.

The realization of the steps II. and III. should induce participants to understand the need of appropriate (and few expensive) equipment to give a better processing of the product and the need to set up a laboratory, even associative or cooperative, supplied by the main tools and machinery and structured in a functional and hygienic way.

The realization of the step IV. should encourage producers to consider medical treatment as an inescapable phase of a “quality road”. The refinement of the techniques of intervention, the adoption of strategies to fight - not only medicine nor active substance - are the answer to a problem that, otherwise, has no solution.

The realization of the step V. intends to bring concrete examples of beekeeping organization in order to obtain benefits, immediate and future; they can only be achieved if pursued through a process of strategic sharing.

The implementation of Step VI. opens the door to possible next phases that Dragash beekeepers decide to make on the way of the honey promotion and enhancement of value chain.

3.1.2. Improvement and implementation of the beekeeping frame law

It would be useful to participate in the revision process of the national beekeeping law. The optimization of the legislative contest is extremely valuable and appropriate. The availability expressed at the Ministry could lead to significant results both in the regulatory framework and in the daily life of hundreds of Kosovar beekeepers. It is absolutely necessary to set the border of “game field” and the “game rules”. The current standard contains so many and such inaccuracies of both method and techniques – diastasic (enzymatic) activity is defined as “diastolic” (sic) - that only the dishonest, fraudulent people and illegal importers can benefit from that one.
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<td></td>
<td>• Meeting with Caritas Kosovo</td>
</tr>
<tr>
<td>Fri</td>
<td></td>
<td>• <em>Travelling (Prizren - Tirana - Perugia)</em></td>
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