

Assessment of the Impact of the Analytical Activities of InteliAgro and the Center for Agricultural Policy Analysis at the Institute of Agricultural Economics

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Abbreviations:

| | |
|------------|------------------------------------------------------------------------------------|
| BAAP | Bulgarian Association of Agricultural Producers |
| BBAB | Bull Breeding Association in Bulgaria |
| BAH | Bulgarian Agricultural Holdings |
| CAP | Common Agricultural Policy |
| CAPA | Center for Agricultural Policy Analysis |
| CATI | Computer-assisted telephone interviewing |
| CAWI | Computer-assisted web interviewing |
| EQ | Evaluation Question |
| FARPI – MU | FAPRI-MU – Food and Agricultural Policy Research Institute, University of Missouri |
| GDP | Gross Domestic Product |
| GOB | Government of Bulgaria |
| IAE | Institute of Agricultural Economics |
| IAF | InteliAgro Foundation |
| IME | Institute on Market Economics |
| IASI | Institute for Agrostrategies and Innovations |
| MoAFF | Ministry of Agriculture, Food and Forestry |
| NAAS | National Agricultural Advisory Service |
| NGPA | National Grain Producers Association |
| NSI | National Statistical Institute |
| NC | North Central |
| NE | North East |
| NW | North West |
| RDP | Rural Development Program |
| SFA | State Fund Agriculture |
| SC | South Central |
| SE | South East |
| SW | South West |

I. Executive Summary

Since January 2012, ABF has supported four different projects targeted at supporting the development of local capacity to provide independent analysis in agriculture and address this growing need. Thus, ABF has tested two approaches in developing the local capacity for carrying out agro-policy and sector analyses and engaging in public debates on critical and important matters in the sector that affect the citizens, business, stakeholders and decision-makers.

The first approach aimed at expanding the capacity of a leading Bulgarian expert team in economic and business matters with expertise in agricultural economics. This later evolved in creating a specialized independent organization to act as a source of quality information, analyses, consultations and advice in the entire spectrum of agribusiness. Apart from these activities, the established center had to address the needs of government authorities, professional associations, private businesses, research institutes, media outlets, and the public. ***This is referred to as an Independent foundation approach.***

The second approach targeted at developing local analytical capacity dedicated to carrying out agro-policy studies by establishing a Center for Agro-policy Analysis (CAPA) at the Institute of Agricultural Economics (IAE), a public entity. The CAPA analytical model is based on the sophisticated econometric modeling approaches applied at the Food and Agricultural Policy Research Institute (FAPRI) at the University of Missouri. ***This is referred to as Governmental research institute approach.***

ABF has invested 1,079,340 BGN in 4 projects between January 2012 and currently with the last project finishing in June 2019.

The purpose and scope of the evaluation conducted was to study the implementation of the two approaches and the results and potential impact achieved. The main objectives of the evaluation, as stated in the RFP were to assess the effect of the analytical efforts of InteliAgro and CAPA on the farmers' and Government of Bulgaria (GOB) access to quality information, analysis and advice as well as the impact of both organizations on the decision-making of farmers and agribusiness firms and the program and policy decisions of the Ministry of Agriculture, Food and Forestry (MOAFF). Additional goal was to assess the sustainability prospects of the organizations, both approaches in terms of efficiency and sustainability prospects and to make recommendations on the feasibility of replicating the models for strengthening the analytical capacity of other sectors of the Bulgarian economy.

Evaluation Design and Methodology

The scope of the evaluation included development of an evaluation methodology and survey tools, data collection, and analyses. Key stakeholders such as decision makers at state entities, representatives of the civil society, agribusinesses and farmers were important contributors to the conclusions and recommendations.

Evaluation methodology was developed during the initial implementation phase and was coordinated with the ABF evaluation team. The methodology was built upon a combination of methods of documentary research, quantitative methods (Quantitative Survey of 251 direct beneficiaries (farmers), randomly selected and stratified sample by holding size (medium, large and very large), sector (cereal and oilseeds, dairy and meat, vegetables and fruit), and the statistical region (NUTS2) where the farmers carry out their agricultural activities); qualitative methods (Forty-four (44) in-depth interviews with other

relevant stakeholders - agricultural associations, MOAFF, farmers, agricultural universities, in-depth interviews with InteliAgro and CAPA's staff, case studies).

The data gathered was analyzed using different methods for statistical analyses and expert evaluation. Some of the methods used include Statistical analysis, Data reliability analysis and logical review; Analysis of samples and calculation of maximum statistical errors for each of the confidence intervals. Descriptive analysis, Descriptive statistics, Statistical evaluation and hypothesis verification Factor analysis. Besides the statistical analyses, Case studies and qualitative experts' evaluations were used.

The Findings and Analyses are structured using the evaluation questions raised in the ToR.

1. Accomplishment of the Objectives Set at Launching

Both implemented approaches have achieved the immediate objectives they have set (CAPA's support is still in place). In terms of long-term impact, InteliAgro has proven to be recognized as an independent analytical unit by various partners as proved by the qualitative survey (in-depth interviews) with different stakeholders.

In terms of impact on production or policy level the impact is very small. This is due to being very optimistic and ambitious formulating the goals but also to the concrete environment in the agricultural sector: business is mostly interested in investment and funding that is supported by the EU structural funds and the government that although open to consultations from the sector is not actually considering such.

2. Outreach of the Two Organizations

Both InteliAgro and CAPA have gained publicity and are recognized by different stakeholders, identified within their goals. Their products are used by different stakeholders to provide information to their members (branch organizations), to be publicized or for statistical and informational purposes. Branch organizations recognize as the most familiar source of information the MoAFF, since they bring the official government policy it is natural they are the most familiar source. This is followed by the specialized TV Programs, specialized websites, Branch Organizations, State Fund Agriculture and CAPA. **Branch organizations use CAPA's services more often than those of InteliAgro.** This is associated with the fact that CAPA is structure within the MoAFF and is related to the government information sources.

Reach out to Farmers: Both CAPA and InteliAgro are recognized by farmers as a source of information - CAPA with 32.3% and IteliAgro with 19.1% recognition. The top five sources are ranked as follows: SFA (96.8% of the respondents), MoAFF (93.6%), specialized TV shows (92.8%), specialized agricultural websites (92.4%) and the NSI (86.5%). Still this is a considerable success since both organizations are comparatively new and much smaller and independent (InteliAgro) compared to the sector ministry or national statistics.

3. Impact of Each Organization, Based on Indicator Analysis

InteliAgro has been critical and objective in their policy positions and proposals and due to that fact they are not quite popular with the administration. On the other hand, InteliAgro team has gained momentum and are appreciated and welcomed by media specialized in economics and agriculture. To summarize, InteliAgro managed to do the planned project activities and even to extend its outreach beyond that (trainings, seminars, events, annual magazine) with personnel limited in number. While CAPA's efforts during that first implementation period were focused on building the model and collecting the data

needed, they managed to achieve their targets as indicated by the table above. During the second phase of their development, the data collected for the indicators shows progress, but the targets are not reached yet. CAPA has one more year to do so.

InteliAgro succeeded in building a strong team though small as well as a network of analysts to use on a case-by-case basis. All these experts supported InteliAgro's research and analytical work and in some cases took care of farmers'/investor's requests for help. The foundation maintains a database of analysts and uses their expertise when needed. During the evaluation period (several months after the project end) it was found that InteliAgro has managed to maintain the same staff and level of operation. This confirms the high prospect of sustainability of the organization and its ability to motivate and keep people.

CAPA started as a separate unit within the IAE with a team of four: a team leader, two researchers, and an assistant writer. It appears challenging to replace experts and train them adequately. Currently, CAPA team consists of a team leader, an analyst, and two assistants.

It is slightly different though with government representatives (different directorate representatives from MoAFF were interviewed). They use mostly governmental sources of information (as part of their work obligations) from sources like the information from various departments of the Ministry itself, EUROSTAT data and other sources like the national statistics, customs, FAO, OECD, the Institute on Agricultural Economics, IME. This is due to the fact that they need to work with "official statistical data" only. The majority consider the materials of both organizations and "not official". Still CAPA being part of a governmental institute is being slightly in a more favorable position.

For both organizations it could be noted that they are not recognized by policy elite, MoAFF or Parliament. Although they have been very active in their work of developing analyses and positions, as well as in working on policy proposals (InteliAgro) and active in numerous forums, there is no data to support that they have been recognized by policy makers.

4. Specific Examples of GOB Decision Making (based on the advice/recommendations of the two approaches)

From the very beginning, the InteliAgro Foundation defined its advisory function as one of its goals in order to provide advice in policy development and act as a bridge between business and administration. One of their activities was to prepare and submit to relevant bodies official statements on draft laws and the allocation of state budget. It took time and a development effort before the name of the organization was recognized in the sector. The organization took active position in developing positions and statements on policy and legislation in the agricultural sector. There are several examples of such positions being considered and included in different acts.

InteliAgro has developed as a brand and gained reputation of professional team who come out with very critical and objective positions among the stakeholders (farmers' organizations, media but mostly MoAFF) which makes them unpopular and unsupported by the policy-makers. InteliAgro tried to work in the area of policy making as they kept providing positions and statements backed and justified by their analysis. Still the impact is limited as very few of their statements have been adopted.

The formulation of **CAPA** goals and their set-up is quite different from InteliAgro – to establish a markets and policy analysis group that conducts systematic assessments of market and policy evolution and to evaluate the impacts on farmers, consumers, trade, and the agribusiness industry and to build a country specific model for 4 main sectors in Bulgarian agriculture. The second phase continues to build upon the

results of the first one. The project succeeded in that effort and was able also to promote the model and analysis. They also have some achievements. Overall, the impact of their efforts have been limited not because the organizations were not active but simply the environment was not favorable for adopting their statements and positions.

5. *Evidence for Improved Productivity of the Farmers*

Evidence for improved productivity of the farmers who used the services of both or one organization was sought with both the qualitative and quantitative interviews but it wasn't found with just few exceptions. We consider this to be due to the fact that although both organizations have stated initially in their proposals that agricultural producers are within their direct beneficiaries' groups, later their priorities developed in such a way that there were very few actions directed at producers' level. InteliAgro provided also consultancy at farm level and there are direct results from such interventions. In order for the farmers to increase their productivity they need direct support and consultancy on their operations, business planning (that would include market information). This has been offered limited.

6. *Comparison of the Success and Deficiencies of the Organizations. Efficiency. Prospects for Sustainability*

Success: InteliAgro accumulated very strong expertise, became well known in the sector, well introduced and recognized within professional circles, established an image as a source of quality information that is politically independent. InteliAgro has taken a specific niche in economic analyses and market analyses where traditionally information is insufficient. The information articles and materials they produce are well explained, clear, concise and accessible, with figures and infographics – in an environment where information is mostly read on mobile devices (different numbers shared by on-line media but more or less about 50% of their users use mobile devices – smartphones and tablets). **Deficiency:** InteliAgro was successful in establishing a network of experts and use them when needed, but it became difficult to manage it. That network did not prove to be reliable either. The major was taking tasks and not fulfilling them on time or with the desired quality standards, “stealing” customers, etc. InteliAgro stopped working with some of the experts and limited their extension services.

The major success of CAPA has been the introduction of modeling approach in agriculture as an important analytical tool. Further, they have succeeded to supply enough information to constitute the statistical lines. In this relation, one of the exclusive achievements of the CAPA is that Bulgarian models are not an automatic transfer of FAPRI model to Bulgaria, rather the elaboration of specific and corresponding to Bulgarian reality models, using the state-of-the-art principles and concepts of model work adopted by FAPRI. With the second project, CAPA has continued to gain expertise and reassure their achievements in modeling. **The major deficiency** of CAPA is within the Institute on Agricultural Economics is often a disadvantageous circumstance. Due to this coexistence, the Centre reports to higher-ranking organizations and institutions and is dependent on the benevolence of their leaders. There is always a risk of malevolent treatment and sudden changes in policy and responses. The Center besides Prof. Bozhdar Ivanov has no other dedicated staff – there have been other two researches but they are working on the modeling and have absolutely no public exposure and none participates in the public and media events or presentations. Although these staff people are trained they need to become more involved.

6. *Symbiosis of the Two Organizations*

There were many examples found of joint activities within projects of both organizations, mostly participation in events and presentations at each other's' events. Other examples for collaboration are their presence in media and participation in interviews. Still the impression is that these are separate

organizations although funded by the same donor. Based on the analysis it seems that there is more formal collaboration between colleagues in organizing and attending public events, moderating individual sessions and the like, without actual interaction aimed at achieving common goals.

8. Competitors of the two ABF-supported organizations and comparison of their capacity and impact

There were some similarities found between InteliAgro and the Institute for Agro strategies and Innovations.

The Institute for Agro strategies and Innovations (IASI) is an NGO founded in 2014 which gets together professionals in agribusiness, food processing and investment in the area of agriculture in their expert capacities. InteliAgro and IASI have been collaborating for certain events focused on CAP (described in the previous sections). Still, there is a clear distinction as the services and activities of InteliAgro have a clear economic focus, while IASI has more policy-related context.

Other similarities (and thus competitors) for both InteliAgro and CAPA could be found among websites and portals (Agroportal, Fermer.bg, Agro.bg, etc.), industry business associations, National Agriculture Forum and others. These similarities are just related to the activities of information provision though both organizations differ in what they do.

Conclusions

✓ Effect of the analytical efforts of InteliAgro and IAE on the farmers' and Government of Bulgaria (GOB) access to quality information, analysis and advice; Impact of both organizations on the decision-making of farmers and agribusiness firms and the program and policy decisions of the Ministry of Agriculture, Food and Forestry (MoAFF);

Based on the assumptions in the report and the results from the assessment both InteliAgro and CAPA have significantly captured farmers' attention and have achieved considerable outreach. Both organizations have produced numerous analytical reports, articles and bulletins with information. Their analyses have been published by different media, websites, branch organizations, and thus received a wide outreach.

Both InteliAgro and CAPA have been recognized by all groups of respondents in the surveys – branch organizations, NAAS regional offices and farmers. They rank low though when respondents are asked to rank different sources of information. All respondents rank first the governmental institutions – typically the Ministry of Agriculture, the State Fund Agriculture and branch organizations.

Both organizations have been successful in providing quality information, analyses and advice to farmers – either directly or through media and agricultural associations. In terms of providing advice to the Government, InteliAgro has developed numerous positions and statements but only few of those have been taken into consideration. CAPA's experts have been invited to work as consultants for certain government tasks, but besides that there has been small impact.

For all projects it could be stated that they included goals focused on impact (the whole agricultural sector, all farmers, etc.) lie level like improving the competitiveness of the Bulgarian agricultural producers were set at macro level targeting a broad audience. In this regards, there is no direct evidence that the projects have influenced the productivity or competitiveness of the whole sector.

✓ Sustainability prospects of the organizations, assessment of the two approaches in terms of sustainability and efficiency

InteliAgro have dedicated time for planning their future sustainability. They have been planning services for profit and has tested those. The organization has been able to diversify their activities from a clear expert organization to such offering specialized professional research services, consulting, specialized services to industry related organizations (like banks), specialized for fee trainings, etc. Early on they have established a for-profit entity to be able to generate income as there were legal barriers for a NGO to generate income. After the project end they continued to cover this whole range of activities with the staff they had during the project implementation and even recruiting new staff. To this respect InteliAgro's sustainability prospects are clear in terms of providing for fee services and planning better to be able to sustain the more analytical and "think-type" activities that do not generate income. There is a possibility though that they decrease their pure "analytical" activities to be able to meet their resources needs. That is why, if they have to sustain the level of information provision, participation in the media and development of analytical reports, development positions and statements on legislation they will need additional external funding, that could be donor generated only.

InteliAgro and the independent Think Tank Approach they represent is more feasible and flexible, as well as with much bigger prospects for sustainability. It comes from the fact that they have a variety of activities and can complement what they do, as well as they are trying revenue generating services and based on experience, they are building on the best models. Another reason is that being independent – not related to a government institution (like CAPA) that have more freedom of being objective and critical and sometimes not supported by branch organizations or the government institutions.

In terms of efficiency, InteliAgro has been very efficient as they have been pooling their resources and expertise to cover different activities with a limited number of staff with very high quality, though, which potentially leads to overload.

CAPA's approach is more conservative because they are part of a state governed institute. This is, on one hand, providing them independence from financial interests, but on the other, making them more vulnerable to political changes and limiting their sustainability options.

The sustainability of CAPA is in close relation with the reliability, usability and persuasiveness of the results and information extracted from the model and the outreach to the stakeholders, on one side, but also on the willingness of the hosting institution to further support it. The results of CAPA's work have been remarkable and well publicized with the second project but still CAPA could not rely on pulling together external recourses or offering for-fee services, since it's not an independent organization. This is demonstrated also by their ability to attract external funding which goes to about 10% of their budget.

There are few options for providing sustainability: it could be provided if IAE adopts the CAPA activities to be within its institutional functions and to financially support it. With political changes or budget cuts this may not be the case.

Another option is to seek for external "project" based funding to be able to sustain the model. Then the funding will have to support the functioning of a team of experts to sustain the model and produce media materials and analyses. Unfortunately, there is no true market for data and informational services. If the model does not exist, the need will be filled in by statistics from the agricultural statistics system (SAPI) which is being criticized by the stakeholders as unreliable or by statistical data that is informally gathered by branch organizations – very unprofessional in fact.

A certain risk in this respect is also that CAPA operates with a very small team and just one team member is publicly associated with the activities and media appearance: CAPA's sustainability is strongly connected with an expert on the team. This makes their sustainability prospects rather low.

Given the different profile and comparative advantages of the two institutions, under the appropriate conditions the America for Bulgaria Foundation could propose an option for pooling the efforts of the two expert teams and seeking complementary activities. As far as we became aware in the course of the study, such discussions of future opportunities for cooperation in specific areas have already been held between Nikolay Valkanov and Bozhidar Ivanov. In the opinion of the evaluators, these issues need to be carefully discussed and joint initiatives and projects need to be encouraged, especially bearing in mind that this is the trend in the non-governmental sector in Bulgaria in the current conditions of limited funding and lack of expert resource.

II. Project Background title, grantee, amount of funding, objectives

Since January 2012, ABF has supported four different projects targeted at supporting the development of local capacity to provide independent analysis in agriculture and address this growing need. Thus, ABF has tested two approaches in developing the local capacity for carrying out agro-policy and sector analyses and engaging in public debates on critical and important matters in the sector that affect the citizens, business, stakeholders and decision-makers.

The first approach aimed at expanding the capacity of a leading Bulgarian expert teams in economic and business matters with expertise in agricultural economics. This later evolved in creating a specialized independent organization to act as a source of quality information, analyses, consultations and advice in the entire spectrum of agribusiness. Apart from these activities, the established center had to address the needs of government authorities, professional associations, private businesses, research institutes, media outlets, and the public. ***This is referred to as an Independent Foundation Approach.***

The second approach targeted at developing local analytical capacity dedicated to carrying out agro-policy studies by establishing a Center for Agro-policy Analysis (CAPA) at the Institute of Agricultural Economics (IAE), a public entity. The CAPA analytical model is based on the sophisticated econometric modeling approaches applied at the Food and Agricultural Policy Research Institute (FAPRI) at the University of Missouri. ***This is referred to as Governmental research institute approach.***

The table below is a synthesis of the four funded projects. Detailed description of the projects is available in Appendix 1 – Request for Proposal (and its Appendices 1 through 4).

| Title of Project | Implementing Organization | Funding (BGN) | Funding (USD) | Implementation Period | Duration (Mo) |
|-------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|----------------------|---------------|------------------------------|--------------------|
| Project 1: Economic Analysis of Agriculture | Institute of Market Economics (IME) | 150,000 | 100,000 | January 2012 – December 2014 | 35 |
| Project 2: Agricultural sector Analysis and Policy Monitoring | InteliAgro Foundation (IAF) | 310,000 | 213,800 | January 2015 – December 2017 | 36 |
| Project 3: Establishment of a center for agricultural policy analysis (CAPA) at the Institute of Agricultural Economics (IAE) | Institute of Agricultural Economics (IAE) | 386,340 | 250,900 | January 2013 – December 2015 | 35 |
| Project 4: Strengthening the Analytical and Public Outreach Capacity of CAPA (2016-2019) | | 233,000 | 134,685 | July 2016 – June 2019 | 36 |
| Total Funding | | 1,079,340 BGN | | | 699,385 USD |

Table 1. Summary of the Funded Projects

III. Evaluation design and Methodology

3.1 Purpose and Scope of the Evaluation

The purpose of the evaluation is to study the implementation of the approaches listed above and the results achieved. The main objectives of the evaluation, as stated in the RFP are:

- ✓ To assess the effect of the analytical efforts of InteliAgro and IAE on the farmers' and Government of Bulgaria (GOB) access to quality information, analysis and advice;
- ✓ To assess the impact of both organizations on the decision-making of farmers and agribusiness firms and the program and policy decisions of the Ministry of Agriculture, Food and Forestry (MOAFF);
- ✓ To assess the sustainability prospects of the organizations;
- ✓ To assess both approaches in terms of efficiency and sustainability prospects;
- ✓ To make recommendations on the feasibility of replicating the models for strengthening the analytical capacity of other sectors of the Bulgarian economy.

The scope of the evaluation included development of an evaluation methodology and survey tools, data collection, and analyses. Key stakeholders such as decision makers at state entities, representatives of the civil society, agribusinesses and farmers were important contributors to the conclusions and recommendations.

3.2. Methodology

The evaluation methodology was developed during the initial implementation phase and was coordinated with the ABF evaluation team. The methodology was built upon a combination of methods shown in Figure 1:

| |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document research methods |
| <ul style="list-style-type: none"> • Analysis of Application forms and Requests for Approval • Analysis of Interim and Final Reports of the Program • Analysis of data and external reports |
| Qualitative Methods |
| <ul style="list-style-type: none"> • In-depth interviews with CAPA's and InteliAgro's staff • Forty-four (44) in-depth interviews with other relevant stakeholders - agricultural associations, MOAFF, farmers, agricultural universities. See the breakdown by stakeholder in Table 2 • Five Case Studies with representatives of the government, farmers, and agricultural associations |
| Quantitative Methods |
| <ul style="list-style-type: none"> • Quantitative Survey of 251 direct beneficiaries (farmers), randomly selected and stratified sample by holding size (medium, large and very large), sector (cereal and oilseeds, dairy and meat, vegetables and fruit), and the statistical region (NUTS2) where the farmers carry out their agricultural activities. See Figure 2 for the profile of the respondents. • Quantitative Survey of seven branch (agricultural) organizations • Quantitative |

Figure 1. Evaluation Methods

The table below presents a snapshot of the respondents of the qualitative interviews.

| In-depth Interviews with Stakeholders | Number of Interviews Conducted |
|-----------------------------------------------------------------------------|--------------------------------|
| Branch/Agricultural Organizations | 8 |
| Farmers (grouped cereal and oilseeds; meat and dairy; fruit and vegetables) | 14 |
| Ministry of Agriculture, Forests Food and Forestry | 5 |
| Agriculture Specialized Media | 4 |
| Agriculture Universities | 1 |
| Agriculture Related Business | 5 |
| InteliAgro | 3 |
| CAPA | 3 |
| ABF Team | 1 |
| Total number of interviews | 44 |

Table 2. In-depth Interviews conducted

Quantitative Survey was also performed with respondents' profile in the Figure below.

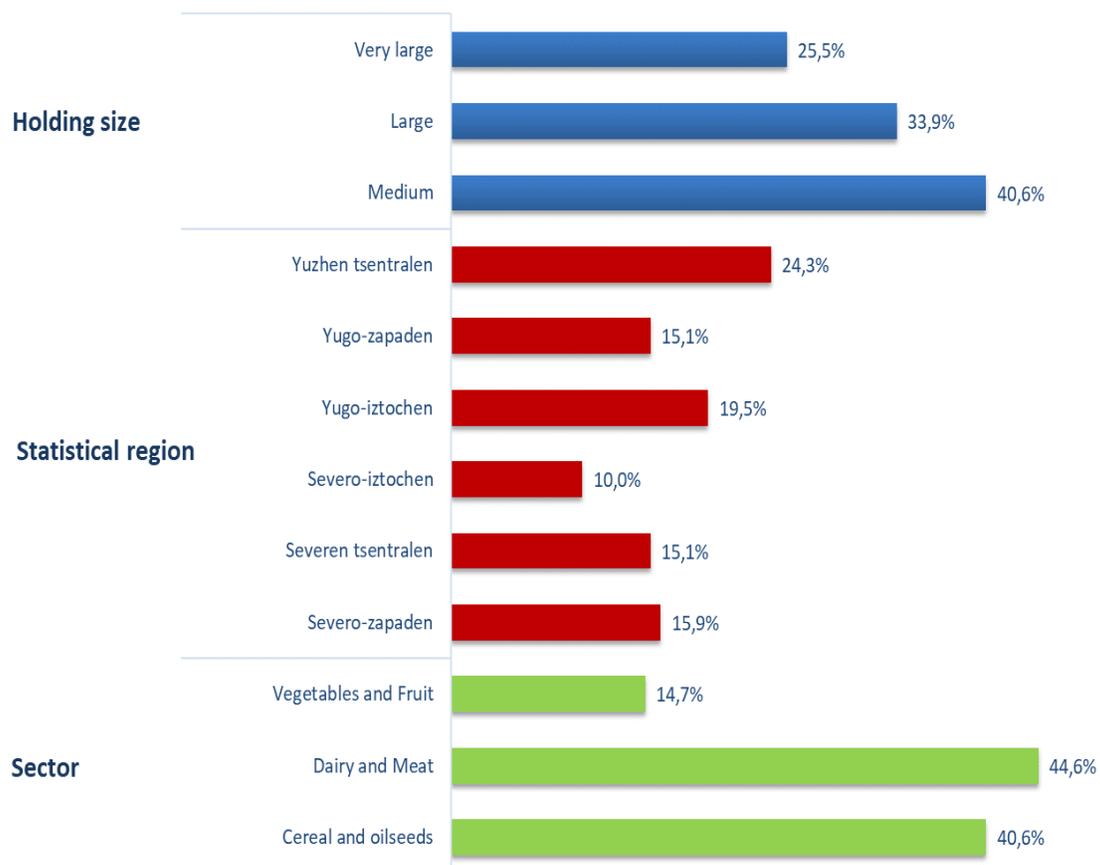


Figure 2. Profile of the respondents based on major characteristics

The data gathered was analyzed using different methods for statistical analyses and expert evaluation. Some of the methods used include Statistical analysis, Data reliability analysis and logical review; Analysis of samples and calculation of maximum statistical errors for each of the confidence intervals. Descriptive analysis, Descriptive statistics, Statistical evaluation and hypothesis verification Factor analysis. Besides the statistical analyses, Case studies and qualitative experts' evaluations were used. More details about the evaluation methodology can be found in Annex 2.

3.3. Limitation and challenges to the evaluation

The key challenges to the evaluation were the complexity of the sector as a whole, as well as the timing of the study, which coincided with the beginning of the busiest agricultural season, starting in June and continuing in July 2018. This has resulted in investing more time and efforts in both, the qualitative and quantitative studies.

Another major challenge was the emergency with the ovine rinderpest disease spreading in some areas of the country – with its outbreak in early July, when the evaluation process started. The situation was quite sensitive because the MoAFF undertook extreme measures to cut the disease, which led to farmers' protests and structural changes concerning senior officials of the MOAFF. As a result, the contacted directorates at the MoAFF were reluctant to participate in the in-depth interviews.

An additional challenge was the inadequate and outdated statistical data about agricultural production. The latest census of the agricultural holdings was done in 2012, with data processed and published in 2013. Since then, numerous changes have taken place, such as farms expanding the size of production and decreasing number of small farms. This challenge was addressed in the quantitative survey through the sample.

A major issue that was not a limitation to the evaluation but is important to be mentioned is the overall status of agriculture in the country as well as its development after Bulgaria's accession to the EU in 2007 when the sector started receiving subsidies and support from the EU. This explains the environment in which the two entities have operated. Both organizations, InteliAgro and CAPA, have produced detailed analytical reports on the impact of the Common Agricultural Policy on Bulgarian agriculture. Based on these publications¹ we have summarized the most important developments in the sector from 2007 onwards.

Bulgaria's membership in the EU has brought financial benefits to the economy and in particular to the agricultural sector. However, the specific indicators (in agriculture) related to production, productivity, efficiency, and added value have revealed weaknesses over the last 10 years, indicating that the industry's rationalization process has come to an end, but EU membership cannot automatically solve the problems and make the industry prosperous.

Total productivity of Bulgarian agriculture has increased since the country joined the EU, with the growth though the number of small farms decreased. The utilization of technological advancements is also rather low. Productivity growth is far from sufficient to catch up with the overall backwardness of the sector and the optimal use of land and labor. The most important engine of progress – investment, lags significantly behind the EU average rate.

The overall actual income from agriculture is increasing but it does not correspond to the increase in direct support. Direct area payments do not have the expected income support effect because they are to a large extent “overflowed” to the owners of agricultural land. Tied aid plays a contradictory role for

¹ Resumes of the reports of CAPA and InteliAgro analyzing 10 years of CAP in Bulgaria - <http://azpb.org/app/uploads/2017/07/CAP-Bulgaria-Analysis.pdf>

And http://inteliagro.bg/Files/71ab3acf-47b9-4fee-96dd-fc0b1f14b2f7CAP_10_years_in_Bulgaria.pdf

different industries. In any case, it should be seen as a temporary income support as it does not create competitive farms, as is shown by the experience of the EU-15 in the past.

In general, the way in which measures and support schemes are implemented in Bulgaria does not contribute to achieving sufficient for investment growth and intensification of the sector, technological innovation and the transfer of knowledge, skills and good practices. Rather it distorts the sector as it invests based on what external funding is available but not real needs.

IV. Findings and Analysis

The Findings and Analyses are structured using the evaluation questions raised in the ToR.

1. Accomplishment of the Objectives Set at Launching

1.1. Independent Foundation Approach

This approach was started in 2012 with the goal to develop an independent agricultural economic analysis unit to serve the needs of Bulgarian agriculture by building analytical capability based on straight-forward quantitative economic analysis, free of ideological and political spin. It was implemented through initially supporting the **Institute on Market Economics (IME)** in 2012 and later on supporting a new independent non-profit legal entity – **InteliAgro** to sustain what was achieved by IME and to continue the implementation of the approach of having an independent organization specializing in agriculture that will establish itself as a natural source of quality information, analysis, consultation and advice in agribusiness.

In terms of impact, InteliAgro had additional goals to improve the competitiveness of Bulgarian agricultural producers and to improve the connection between business, research institutes, independent advisors and the agricultural service industry.

With its establishment, InteliAgro launched a website that quickly became a major instrument to channel information analytical studies, comments and articles on agricultural markets in Bulgarian and in English, government policy in the sector, the implementation of the CAP in the sector, market trends. The organization established and maintained a network of experts in different fields of agriculture to share their knowledge with the farmers, they started providing trainings on specific agricultural topics, began also paid consulting services to farmers. InteliAgro became a recognized analytical entity based on their activities to produce articles and studies, they also began to submit official statements on draft laws and on the state budget allocations to the relevant bodies in the sector; organized trainings, consulted agricultural businesses.

1.2. Governmental research institute approach

This approach was supported through the establishment of a center for agricultural policy analysis (CAPA) at the Institute of Agricultural Economics (2013 – 2015), implemented by the Institute of Agricultural Economics (IAE) and strengthening the analytical and public outreach capacity of the Center at IAE.

The center was expected to conduct systematic assessments of market and policy developments and to evaluate their impact on the agricultural sector as well as to develop econometric models tailored to four agricultural sectors in Bulgaria to provide quantitative data for key indicators and project their mid-term values.

The implementation of activities adhered to the plan. The center was established, a team of analysts selected and trained, the models were developed, and data was collected, structured and entered into in the models. In the course of its development, CAPA gained more visibility and the analysts started

participating in events, publishing analytical materials and statements to the MOAFF. The second project was still in implementation during the evaluation.

1.3. Findings:

Both implemented approaches have achieved the immediate objectives they have set (CAPA's support is still in place). The planned activities by the two entities were implemented completely, which is evidenced by the indicators' values achieved. The short-term indicators (results) have been achieved and some exceeded. For example, InteliAgro (including IME) developed 18 analytical papers, published more than 245 articles (including 101 articles in the IME bulletin and 144 in other publications), CAPA produced 10 reports and published 25 articles.

In terms of long-term impact, InteliAgro has proven to be recognized as an independent analytical unit by various partners as proved by the qualitative survey (in-depth interviews) with different stakeholders. Evidence is summarized in section 2 (page 10) and 3 (page 18).

With its establishment CAPA has also completely accomplished its goals, which is justified by the reported indicators. Activities, part of their support, are still in implementation but most of the indicators exceed the targets judging by midterm results, some are close to targets, while others are still in implementation.

Both organizations have set goals to impact the whole agricultural sector, all farmers, etc. that were set at macro level targeting a broad audience. In this regard, there is no direct evidence of the impact of the two organizations like if they have influenced the productivity or competitiveness of the sector in its entirety. Neither there is evidence that they have influenced policy formulation or government decisions. Both organizations have put effort and have achieved some impact, but it is mostly in terms of development of analytical information and providing access to such, as well as outreach through different media or organizing and participating in specialized events. In terms of impact on production or policy level the impact is very small.

This is due to being very optimistic and ambitious formulating the goals but also to the concrete environment in the agricultural sector: business is mostly interested in investment and funding that is supported by the EU structural funds and the government that although open to consultations from the sector is not actually considering such.

2. Outreach of the Two Organizations

To analyze the outreach, the evaluation team used the data from the technical reports of both InteliAgro and CAPA, as well as data from the qualitative and quantitative surveys.

Both organizations (including IME at the very beginning) have included within their goals and objectives that they will target a wide group of actors in agriculture – practically all types of entities and organizations: agricultural producers, companies and institutions from the supporting industry, research institutes and universities, students, the public administration and decision makers. The wider public that is interested in the processes taking place in the agricultural was also considered to be within the outreach of the projects. CAPA also differentiated between the main sectors, namely: cereal (wheat, maize and sunflower), dairy (cow milk) and meat (pork, poultry and beef), which will benefit over 300,000 farms in Bulgaria that will have an access to the results of the analysis while planning their future activities.

MOAFF and other governmental institutions were also considered to have direct benefit from the project (CAPA) with the potential to use the baseline projections in designing the policy based on reliable and substantiated basis.

InteliAgro worked towards establishing itself as a main provider of reliable information for the agricultural sector in Bulgaria. The organization quickly became very active in their informational role building different communication channels: their own website, social media, newspapers and TV. In terms of outreach, though, when the project had been designed the outreach estimation included the entire sector

with estimated 85,000 agricultural producers, several hundred companies and institutions from the supporting industry, research institutes and universities, students, the public administration and decision makers. The design team did not stratify and made a better judgement what number of farmers and industry would in fact be getting access and how information will be channeled to the industry.

For the first two years, the CAPA team targeted at mastering the state-of-the-art modeling methodology and to adopt it for elaboration of the analytical system and derivation of results for main sectors in the Bulgarian agriculture, namely: cereal (wheat, maize and sunflower), dairy (cow milk) and meat (pork, poultry and beef), which was supposed to impact about 300,000 farms in Bulgaria that would have been able to use the results from the analysis in planning their future activities. MOAFF and other governmental institutions were also considered as potential beneficiaries of the project.

Findings:

2.1. Publicity and recognition gained: the data from the qualitative survey confirmed that both organizations have developed and gained publicity and are recognized by different stakeholders, identified within their goals. Their products are used by different stakeholders to provide information to their members (branch organizations), to be publicized or for statistical and informational purposes.

2.2. Reach out to Branch organizations: Branch organizations recognize as the most familiar source of information the Ministry of Agriculture, Forestry and Food. Since MOAFF brings the official government policy it is natural they are the most familiar source. This is followed by the specialized TV Programs, specialized websites, Branch Organizations, State Fund Agriculture and CAPA².

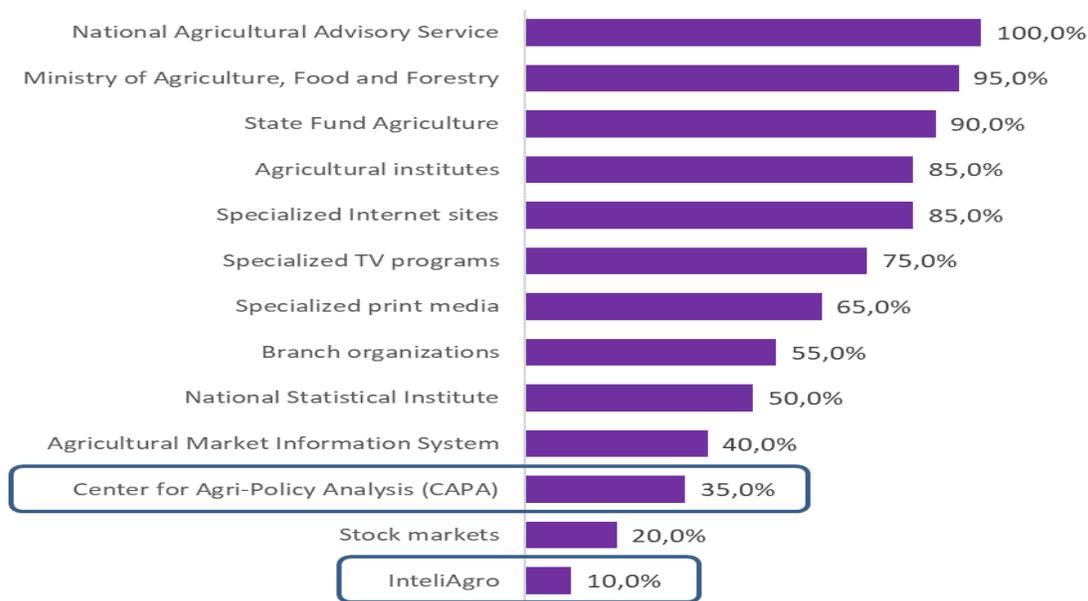
2.3. Branch organizations use CAPA's services more often than those of InteliAgro (once a month or several months), the main purpose of which is to obtain up-to-date information, to study market trends in the industry and to search for new markets for members. The respondents consider the information from both sources to be quite useful. This is due to the fact that CAPA is also associated with the government information sources.

2.4. The main types of information needed by these organizations are: statistical information about the activity in the branch, the consumption of agricultural products, current news and industry information, forecasts and trends for the development of branch and available funding from European programs and projects.

2.5. Reach-out to State Entities: Prompted awareness³ with the main sources of information on agricultural activity in Bulgaria shows that the most popular (logically) data is provided by the National Agricultural Advices Services (100% of respondents), followed by the Ministry of Agriculture, Food and Forestry (95%), State Fund Agriculture (90%), agricultural institutes (85%) and specialized sites (85%). Thus, 35% are familiar with CAPA and 10% with InteliAgro.

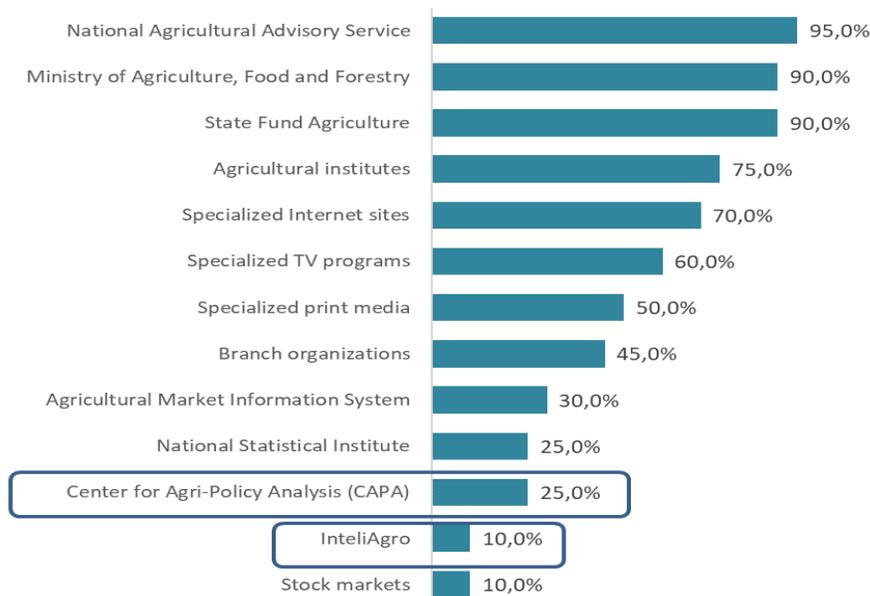
² Survey with branch organizations, Appendix

³ Survey with National Agricultural Advices Services



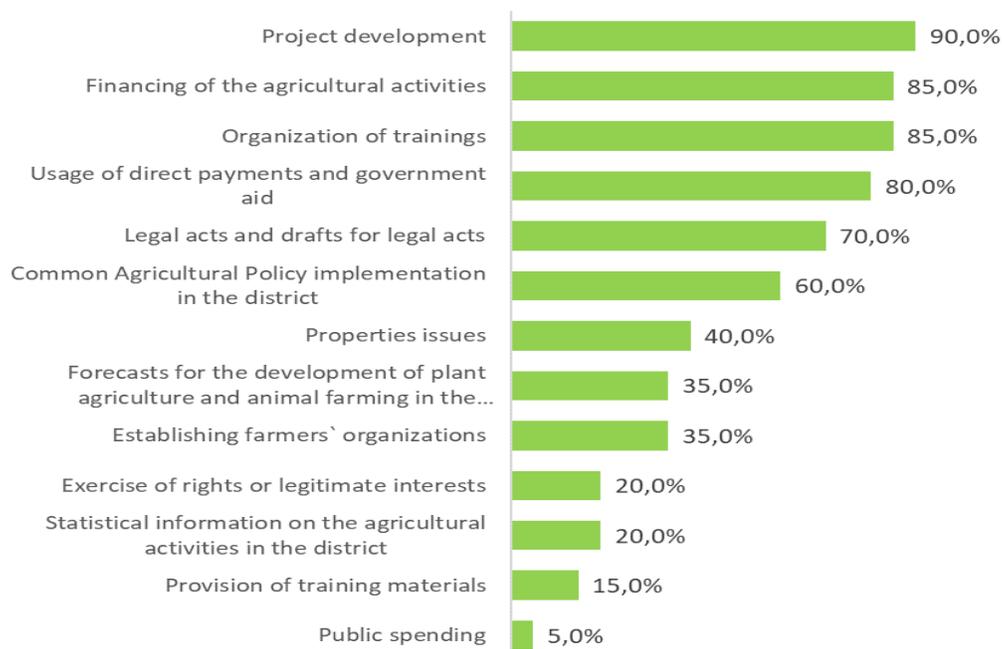
Source: Quantitative survey (base: 20 respondents)
 Figure 3. Prompted awareness of the main information sources

2.6. Pattern of information usage: the NAAS and its regional offices most frequently use their own information and also from the Ministry (MOAFF), State Fund Agriculture⁴, Agricultural institutes, etc. Both CAPA and IntelliAgro rank comparatively low with rate of awareness 25% (CAPA) and 10% (InteliAgro).



Source: Quantitative survey (base: 20 respondents)
 Figure 4. Main information sources usage

⁴ Related to information for funds from the Rural Development Program funded by the EU



Source: Quantitative survey (base: 20 respondents)

Figure 5. Main types of information requested

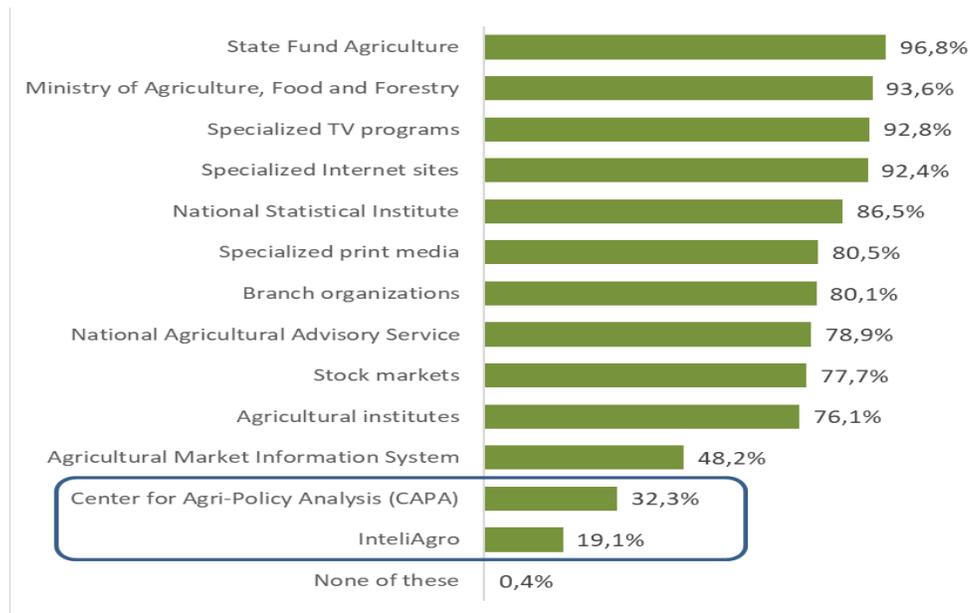
2.7. Patterns of Information used from NAAS: the information that NAAS transfers to their users mostly originates from MoAFF, SFA and the services themselves, while both CAPA and InteliAgro are at the bottom of the ranking with 10% share. This distribution is such since the NAAS users most often seek information on project opportunities and preparation (90%), financing of agricultural activities (85%), trainings (85%), direct payments and state aid (80%), legislation and drafts laws (70%) and InteliAgro and CAPA produce economic analyses and market information. These users fall within the following groups: agricultural producers (100%), but also citizens (75%), media (70%), branch organizations (40%).

2.8. Reach out to Farmers: Both CAPA and InteliAgro⁵ are recognized by farmers as a source of information - CAPA with 32.3% and InteliAgro with 19.1% recognition. The top five sources are ranked as follows: SFA (96.8% of the respondents), MoAFF (93.6%), specialized TV shows (92.8%), specialized agricultural websites (92.4%) and the NSI (86.5%). Still this is a considerable success since both organizations are comparatively new and much smaller and independent (InteliAgro) compared to the sector ministry or national statistics. Another important fact is that the organizations have become widely identifiable by the names of the lead persons – Nikolay Valkanov for InteliAgro and Bozhidar Ivanov for CAPA, often guests to different media programs presenting their analysis on certain sector-related matters. Sometimes immediate users of the presented information such as farmers are unaware that these people represent the organizations in question.

This ranking is almost unchanged by farm size, sector and location of the activity. Meat and dairy producers are an exception as they tend to use printed media (ranks 5th). Farmers from NE Bulgaria have ranked the branch organizations among the top 5 sources. The largest farms also rely on information from

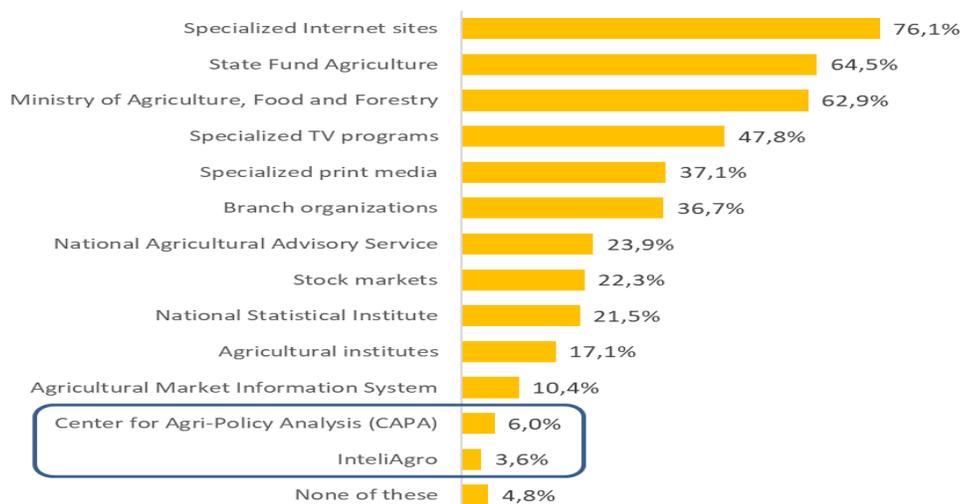
⁵ Survey with farmers

industry organizations. This is valid since the largest farms are situated in the NE Bulgaria and form the backbone of the stronger branch associations.



Source: Quantitative survey (base: 251 respondents)
 Figure 6. Main information sources awareness

2.9. Recognition as a source of information: both CAPA and InteliAgro are recognized by the respondents (farmers) as a source of information for planning their agricultural activities, but they rank quite low: 6% for CAPA and respectively 3.6% InteliAgro. The top 5 places are for: specialized agricultural information sites (76.1%), State Fund Agriculture (64.5%), MoAFF 62.9%), specialized TV shows (47.8%) and specialized printed publications (37.1%). In their planning, only 6% of farmers use the CAPA services and 3.6% of InteliAgro. Still, both organizations have been recognized.

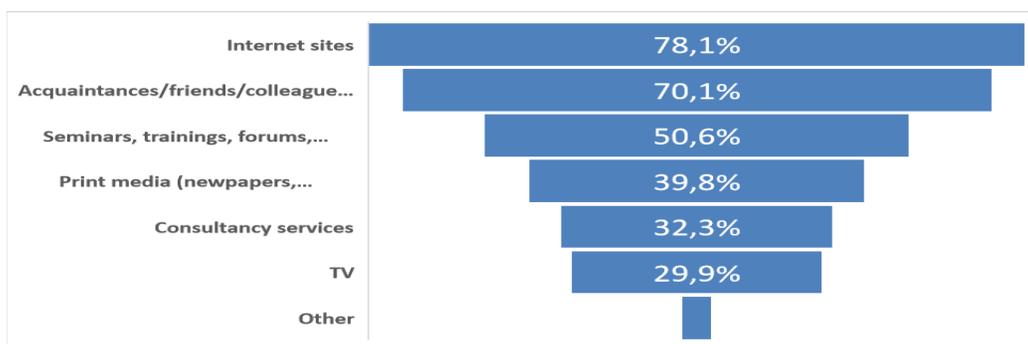


Source: Quantitative survey (base: 251 respondents)
 Figure 7. Main information sources usage

The ranking remains virtually unchanged for the different “categories” of respondents, except for cases where branch organizations appear as part of the information flow – they are recognized as major source by large farmers from Northwest and Northeast regions. The NAAS also takes one of the top positions among farmers growing vegetables and fruits. The majority of respondents (over 60%) who do not use the InteliAgro services are still well aware of the organization (15.5% of all respondents).

Although more than ¼ of the respondents (26.3%) have some previous knowledge of CAPA, more than 60% of those cannot say exactly what the activities of this organization are. Those who still have an idea point out that CAPA is involved in advice, analysis, research and forecasting in agriculture in particular.

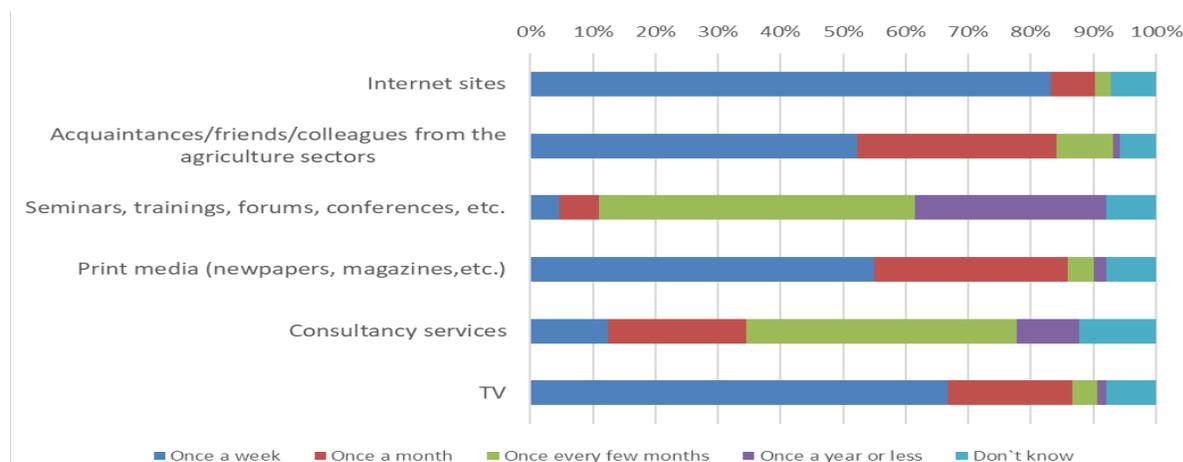
2.10. Pattern of Information Search: few questions were included in this respect and it appears that little over ¾ of the farmers (78.1%) use websites as the primary source of information for their business, including organizing and planning their activities, as 83.2% visit these sites at least once a week.



Source: Quantitative survey (base: 251 respondents)

Figure 8. Main types of information sources

The second most important source of information is informal – it is the information provided by acquaintances, friends and colleagues that operate in the same economic sector (70.1%). The information exchange occurs at least once a week for half of the respondents (52.3%), and for 31.8% less frequently – once a month. Respondents state that information received from seminars, trainings and forums (50.6%) proved to be valuable, although they participate relatively less frequently – for 50.4% of the respondents this is once every few months, and 30.7% once a year or less frequently.

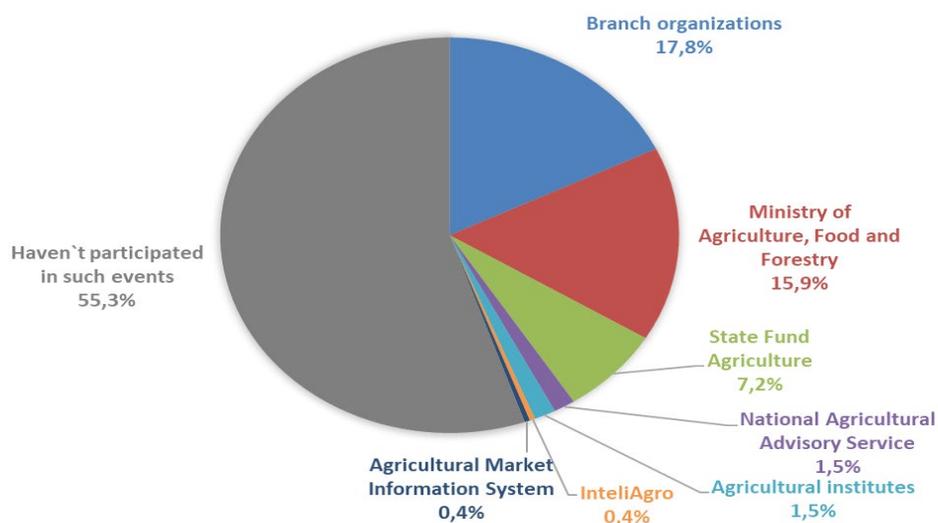


Source: Quantitative survey

Figure 9. Sources of information and their importance

There are some territorial differences in terms of preferred source of information: farmers from NC Bulgaria place the TV programs third in terms of source importance, while farmers in SW region rank third the print media. Less common sources among farmers are: print editions (39.8% of respondents), consultancy services (32.3%) and television broadcasts (29.9%), although the frequency of use of these sources is relatively high.

2.11. Trainings and Knowledge Search: when asked if they have participated in trainings, responding farmers state that they are not particularly active – in the last one year 58.2% of the respondents did not participate in any event. The rest responded that they have participated mostly in events, organized by the branch organizations (18.7%), MoAFF (16.7%) and SFA (7.6%). Of all respondents there was only one that pointed out the events of InteliAgro.

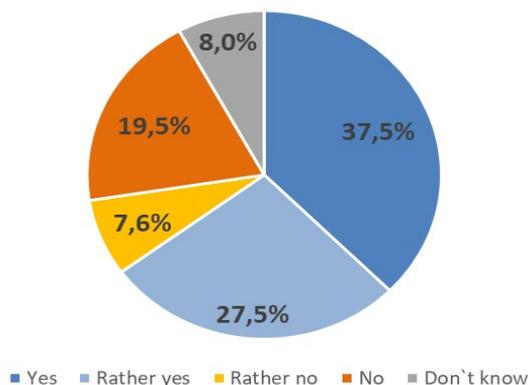


Source: Quantitative survey (base: 251 respondents)

Figure 10. Seminars, trainings, conferences and other events participation

It could be noted though that the most active participants are fruit and/or vegetable growers (51.4%), farmers in Southcentral region (52.5%) and average sized farms 55.3%.

2.12. Interest to learn more about the two organizations: at the end of the survey the respondents were asked if they would be interested to find more about InteliAgro and CAPA and their services.



Source: Quantitative survey (base: 251 respondents)

Figure 11. Willingness for getting extra information about InteliAgro and CAPA services

3. Impact of Each Organization, Based on Indicator Analysis

3.1. Output Indicators⁶:

The table below presents the achievements of the two organizations, respectively approaches:

| | Research Papers | Publications | Media Appearances | Media | Participation in Public Events |
|-------------------------|-----------------|------------------------------------------------------------------------------------------------------|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| InteliAgro ⁷ | 18 papers | 101 articles in the IME bulletin 144 articles annual magazine that is distributed to stakeholders | 210 interviews, articles, comments or media reprints | BNT, bTV and Nova televisions, Capital Weekly, 24 hours, Sega, Trud, Standart Daily, Investor, Dnevnik , Mediapool Agrozone Magazine, Forbes Bulgaria, Manager Magazine and Food Industry, TV production "Brazdi"; Forbes Russia and French television ARTE | 41 national and international public events, conferences, fairs and exhibitions and organized three |
| CAPA | 10 reports | 25 articles | Over 100 news and briefs | Bulgarian and international scientific journals | 30 public events: 6 round tables, 10 seminars, 11 workshops |

Table 3. Achievement in Output Indicators by IME, InteliAgro and CAPA

As displayed in the table above both organizations have achieved what they have promised, measured through the output indicators.

Findings:

3.1.1 Independent Foundation Approach (InteliAgro)

The indicators planned by IME and **InteliAgro** were completely met and exceeded as is shown in the table below:

| Output Indicators | Target | Achieved | Output Indicators | Target | Achieved |
|-----------------------------------------------------------------|--------|----------|----------------------------------------|--------|----------------------------------|
| Phase 1 Indicators (IME) | | | Phase 2 Indicators (InteliAgro) | | |
| Articles and publications | NA | 101 | Articles | 144 | 144 |
| Analyses and Research reports | NA | 8 | Analyses and paid reports | 12 | 10 |
| Media Appearances | NA | 129 | Legislative assessments | NA | 8 |
| Number of issues of the Grain Markets Overview monthly bulletin | NA | 21 | farm business plans | 7 | 9 |
| Surveys (farmers problems and challenges) | NA | 2 | Participation in different events | NA | 33 events with 3200 participants |

Table 4. Achievement of IME and InteliAgro Output indicators

⁶ Number and quality of: policy proposals and ideas generated; publications produced; news interviews conducted; briefings, conferences, and seminars organized; and staff who are nominated to advisory and government posts

⁷ The data includes also the achievements of IME

The approach implemented by IME resulted in well-established media presence and provision of articles and other publications. Building on what was achieved InteliAgro continued as they turn to be more successful in developing articles and specialized analyses rather than developing policy proposals, the limitations being not the quality of the proposals but the openness to changes by the government. InteliAgro has worked on participation in policy making and developing policy proposals joining forces with other organizations, but their suggestions have not been backed by the agricultural sector. (More detailed information in p. 4. Specific examples of GOB decision making on p. 27 where policy proposals developed by InteliAgro are reviewed).

InteliAgro has been critical and objective in their policy positions and proposals and due to that fact they are not quite popular with the administration. On the other hand, InteliAgro team has gained momentum and are appreciated and welcomed by media specialized in economics and agriculture.

“....Yes, what is very valuable in what they do is that they have a very critical approach that is very useful. Their articles and analyses are highly objective which is very rare for what has been published in Bulgaria... Because they are very critical and objective, you could trust the information they publish.... Sometimes they are even too critical...”

To summarize, InteliAgro managed to do the planned project activities and even to extend its outreach beyond that (trainings, seminars, events, annual magazine) with personnel limited in number.

3.1.2. **Governmental Research Institute Approach (CAPA)**

The achievement of the indicators for the two CAPA projects are presented in the table below:

| Output Indicators | Target | Achieved | Output Indicators | Target | Achieved |
|--------------------------------------------------------|---------|-------------|----------------------------------------------------------------------------------------------------------|--------|----------|
| CAPA I | | | CAPA II | | |
| Number of analytical reports | 5 | 10 | Involvement in national policy impacting tasks (program assessments, analyses, scenarios) | 8 | 4 |
| Discussions and information meetings with stakeholders | 50 | 57 | Consultations to producers, branch organizations, agribusinesses, MOAFF | 36 | 18 |
| Publications and presentations at events | Regular | 25 articles | Monthly bulletins distributed | 36 | 14 |
| Media reprints | | About 100 | Articles and publications | 40 | 26 |
| | | | Discussions, roundtables and Outlook Forums | 9 | 0 |
| | | | Participation in workshops organized by other stakeholders | 24 | 5 |
| | | | Participants in CAPA organized events | 450 | 85 |
| | | | Attendees in events organized by other organizations where CAPA team is invited to deliver presentations | 1500 | 220 |

Table 5. Achievement of CAPA Indicators

While CAPA’s efforts during that first implementation period were focused on building the model and collecting the data needed, they managed to achieve their targets as indicated by the table above.

During the second phase of their development, the data collected for the indicators shows progress, but the targets are not reached yet. CAPA has one more year to do so.

“Farmers and agribusiness have already learnt (except the smallest ones) how to use information from different sources, appreciate to have such in a market economy. They use different sources of information, the trainings of NAAS, InteliAgro and CAPA, electronic media. Some of the branch associations are also very strong at providing information – for example the association for bio production, grain producers, etc. “

3.2. Resource Indicators⁸:

Review of the organizations’ administrative capacity was done as part of the evaluation to judge on issues such as personnel, ability to perform the tasks, etc.

3.2.1. Ability to recruit and retain quality analysts, quality and reliability of networks. Staff with the ability to conduct rigorous research and produce timely and incisive analyses and to maintain key contacts in the public sector, civil society, farmers’ communities, and media.

InteliAgro. After completion of the first phase a number of experts gradually joined the team of InteliAgro: during the first half of 2015 a permanent employee was hired – an expert analyst and later, in 2016, a part-time associate and European funding expert joined the team as well. The increasing workload forced InteliAgro to ask for budget amendment in 2017 to employ a temporary administrative support member. InteliAgro sustained this staff till the end of the project and after.

Additionally, InteliAgro succeeded in building a network of analysts to use on a case-by-case basis. All these experts supported InteliAgro’s research and analytical work and in some cases took care of farmers’/investor’s requests for help. The foundation maintains a database of analysts and uses their expertise when needed.

During the evaluation period (several months after the project end) it was found that InteliAgro has managed to maintain the same staff and level of operation. This confirms the high prospect of sustainability of the organization and its ability to motivate and keep people. InteliAgro is also looking for opportunities to expand their team.

Although quite successful in their personnel policy, InteliAgro is challenged as number of staff is a limitation to growth. The team is very small and division between administrative, operational, organizational and truly expert activities like analytical and consulting is a limitation – they all are distributed between a small staff which is overloaded. With InteliAgro being self-sustainable they need to focus more on activities that are for fee and may not be able to keep the same level of expert activities, as well as the same level of presence in media.

CAPA started as a separate unit within the IAE with a team of four: a team leader, two researchers, and an assistant writer. Three researchers from FARPI were also included.

Later, one of the analysts was invited by the Analytical Department of MOAFF and went to work there. On the one hand, this was a recognition for CAPA’s ability to develop professionals who are valued and attracted by a government entity. On the other hand, the loss of a key member of the team was difficult to compensate. Attracting analysts is challenging as CAPA’s activities are very specific and differ from what

⁸ *Ability to recruit and retain quality analysts; the level, diversity, and stability of financial support; support of the hosting institution; proximity and access to decision makers and other policy elites; a staff with the ability to conduct rigorous research and produce timely and incisive analyses; quality and reliability of networks; and key contacts in the public sector, civil society, farmers’ communities, and media.*

the rest of the IAE staff does. Thus, it appears challenging to replace experts and train them adequately. Currently, CAPA team consists of a team leader, an analyst, and two assistants.

3.2.2. Level, diversity and stability of financial support

InteliAgro was developed as an expert organization but also with the flexibility to offer related services (analytical and consulting). So, on one hand, the organization could make more use of its capacity, while also attracting additional funding in support of their sustainability. The organization planned for paid services at a very early stage of their existence and started offering them. However, due to the status of the organization (it is Foundation) it had limitations in the amount of funding they can attract. So a for-profit entity was also established in order to provide for fee services.

Despite this limitation, the targeted revenue generated by the organization was met (described in detail on p. 27 when comparing the success and deficiencies of the organizations based on the different organizational models they have utilized) – a true sign that their work was well-accepted by the private sector and the organization has future after the end of the project. This is an essential evidence that InteliAgro is achieving efficiency and is developing a pragmatic approach, working steadily towards building sustainability based on provision of services that could be income-generating.

CAPA is a unit within the Institute of Agricultural Economics. Being a part of a bigger structure puts CAPA in a situation which preconditions both limitations and advantages for its operation. It has no operational independence but also gets the benefits of the IAE. As such unit, CAPA cannot be contracted independently to offer business services but at the same time does not need to offer for fee services in order to cover their expenses (such as rent, utilities, etc.). CAPA has not managed to complete the targets for financial income but they have attracted additional funding. (Detailed review on p. 27 when comparing the success and deficiencies of the organizations based on the different organizational models they have utilized)

3.2.3. Support of the hosting institution

This applies to CAPA only as it is a unit without operational independence within an Institute under the auspices of the MoAFF. The project has been supported by the IAE but still it bears certain risks in the long run (as also stated in CAPA's reports), since the state of public sector and public funding in Bulgaria is not clearly organized and sufficiently provisioned. The project of the Center is just one of the many projects the Institute has and is working on. CAPA sustainability is at a risk if the model and the functions of the team are not institutionalized within the IAE. Further, relying exclusively on governmental support creates a risk of dependencies due to the politicians' willingness to see comfortable policy and sector analyses rather than objective studies exposing problems and weaknesses. Other options of funding, such as agricultural associations, agricultural unions, or other NGOs are unrealistic at this point of time because the sector is too fragmented and resistant to joint action.

This hypothesis was verified against the data collected during the in-depth interviews.

3.3. Utilization Indicators⁹:

Conclusions in this section are based on the implementation reports of the two organizations and the in-depth interviews conducted with several groups of stakeholders including agricultural/branch associations, MOAFF representatives, and media.

⁹ Reputation as a "go-to" organization by media and policy elites; quantity and quality of media appearances and citations, web hits, testimony before legislative and executive bodies; briefings, official appointments, consultation by officials or departments/agencies; reports distributed; references made to research and analysis in scholarly and popular publications and attendees at conferences and seminars organized.

3.3.1 Recognition by Media

Both organizations have been recognized by media and sector organizations and government but there are subtle differences in the way they have been valued by the different groups of stakeholders. Different sector organizations have different opinions on the value of the analyses produced by both organizations, but the general understanding is that both organizations are very accurate and objective in what they develop.

“... we are well aware of both organizations and the materials they publish. It is excellent that there is difference in their analyses. InteliAgro are very objective and critical, as far as I know they are a private entity and many of their analyses are direct and critical, something that farmers and government don't appreciate. While the other organization (CAPA) is a government institute and thus, they cannot put themselves in the shoes of the farmers, you could see the government position. Thus, when you put the analyses of the two organizations together you could make the complete picture, they complement each other...”

“..... They are good enough economists and analysts both to move away from the positions (market) they always defend. This is also very useful because a tendency or a financial instrument where the colors of the political parties overlap – it is distorted. Both are valuable because there is invariably a market-based "fundamentalism" that I am very happy with, because Bulgarian farmers need to understand that they cannot be tainted by the state, constantly on the road and throw away this or that. There must be people like them and though unpleasant to them to go out and tell them 'you gentlemen, have been working in a market economy for many years, and you have to take your business and fate into your hands.' These are those people who consistently follow the market logic of the show”

All stakeholders interviewed are aware of both organizations, sometimes referring though to only Nikolay Valkanov and Bozhidar Ivanov. Since both organizations are new and Mr. Valkanov and Mr. Ivanov often speak on their behalf it is still a sign that they are recognized. Branch organizations that were interviewed (The National Association of Grain Producers, the National Union of Livestock Producers, the National Union of Gardeners, the National Union of Fruit and Vegetable Processors, the National Association of Agricultural Producers, etc.) shared they use information and analyses from both InteliAgro and CAPA, and value that. There are some differences in the positions varying between the fact that InteliAgro are “private” organization and they have the “liberty” to be independent and very critical with their materials. Often their positions are in-line with what the associations observations lead. The materials of InteliAgro have been developed and designed in very professional manner and differ a lot from what has been issued and published in Bulgaria in the area of agriculture in a positive way. They have been known by the stakeholders for their analyses and publications on the website, for the events organized and also as an organization providing consulting support to producers. The Association of Agricultural Producers are not quite positive towards InteliAgro saying “they have not been proactive in contacting us”. CAPA is also well familiar to the stakeholders with their analytical work and the monthly newsletters they provide to all stakeholders. There are some issues with the scope of the bulletin, as it covers few sectors (grain production mostly). The other issue with CAPA is that they are considered to be related to the government and “when someone works for a government organization cannot be on both sides of the fence – I think what CAPA produces is not that direct and critical”, also they are expected to be “more involved in policy development since they have the analyses to justify certain decision to be taken, but they do not go ahead to support their opinion with the government”.

With small differences but branch organizations representatives think that the analyses developed by InteliAgro are invaluable – very precise and concrete to the subjects, different from governmental information and analyses. CAPA analyses are also considered very valuable with some statements that

being part of the government system, they cannot be very critical. Industry Associations forward CAPA's newsletter to their members.

It is slightly different though with government representatives (different directorate representatives from MoAFF were interviewed). They use mostly governmental sources of information (as part of their work obligations) from sources like the information from various departments of the Ministry itself, EUROSTAT data and other sources like the national statistics, customs, FAO, OECD, the Institute on Agricultural Economics, IME. This is due to the fact that they need to work with "official statistical data" only. The interviewed representatives know about both InteliAgro and CAPA but only two experts shared that sometimes review their materials in order to compare positions and information. The majority consider the materials of both organizations and "not official". Still CAPA being part of a governmental institute is being slightly in a more favorable position.

Overall, both organizations have been recognized by counterparts and stakeholders and have gained awareness. While a lot has been done by both InteliAgro and CAPA there is still an identified need for information in the agricultural sector.

We can conclude that both InteliAgro and CAPA have succeeded in its main goal – to become a major source of quality information for the agricultural sector. There is no impact though in terms of the government taking in consideration their analyses and policy recommendations.

3.3.2. Quantity and Quality of media appearance and citations

The quality of work of both organizations has been pointed out by different media representatives in the in-depth interviews as "high quality and independent subjective information".

InteliAgro continued to be very active in their media appearances (what was started by IME) with 255 articles published in different publications and programs like Bulgaria Newspaper Group (Trud & 24 Hours), Agrozona Magazine, Forbes Bulgaria, Manager Magazine and Food Industry TV production "Brazdi"; Forbes Russia and French television ARTE, more than 200 media appearances. They have been valued guests in TV programs and highly appreciated by media (based on the interviews with media representatives).

The CAPA team has more moderate presence in media, although they gained momentum and Bozhidar Ivanov became more active in the marketing efforts and media participation. CAPA maintains good connections and is recognizable by media, especially branch ones. Through media CAPA outreaches the public and interested parties, identifying problems, fostering discussions and thinking and creating prepositions for changing and improving Bulgarian agriculture. InteliAgro has been very active from the very beginning in media. In terms of numbers it is 25 articles developed, over 100 news and briefs in Bulgarian and international scientific publications.

A valuable lesson learnt from the implementation of the first project was that the team realized the importance of investing time to enhance its abilities to communicate with media and present their position. The participation of the team in information broadcasts and columns also permitted the direct beneficiaries of the Center for Agricultural Policy Analysis to expand its visibility among a wider audience.

3.3.3. Recognition by Policy Elites

For both organizations it could be noted that they are not recognized by policy elite, MoAFF or Parliament. Although they have been very active in their work of developing analyses and positions, as well as in working on policy proposals (InteliAgro) and active in numerous forums, there is no data to support that they have been recognized by policy makers.

3.4. Impact Indicators¹⁰:

3.4.1. Recommendations considered or adopted by private sector, civil society, and farmers' community and advisory role to decision makers and farmers;

Both organizations have developed analyses, analytical reports, articles, statements, recommendations. Their work is highly appreciated, their recommendations are taken under consideration by the agricultural associations, but there is no evidence that any of their proposals have been adopted. Nevertheless, it is worth mentioning some of their attempts to take a stance and provide counsel to the benefit of the agricultural producers. Several examples follow:

In 2016, the National Association of Grain Producers tasked InteliAgro to research the methods of financing of hail-protection systems throughout Europe with regards to the MoAFF plans to increase the area under protection to cover the entire country and to obligate farmers and insurers to pay a special tax to support the system. InteliAgro's report laid out the practice around the world and revealed that there was no complete protection by the state and where there is some protection, it is voluntarily supported by the stakeholders. Obviously, this was not the finding expected by the National Association of Grain Producers, so, InteliAgro was not further engaged in the discussions between the MoAFF and the Association. The report was abandoned and later in 2018 (after the reporting period) when the MoAFF started public consultations on the above-mentioned idea, InteliAgro was a stand-alone voice arguing that the government propositions have been designed and planned non-transparently and if implemented can ruin the private insurance sector, imposing unfair burden to insured owners.

In terms of collaboration with the government there are also different situations: InteliAgro made a breakthrough by entering the working group on M 16.1 of the Rural Development Program but the administration seemed to ignore their work. This is also demonstrated in the in-depth interviews, where InteliAgro was completely ignored by the MoAFF. This could be explained with the fact that the administration is particularly intolerant of any form of criticism.

InteliAgro has completed this indicator as some of the products of their work are:

1. "Alternative Proposition for the National Payments for tobacco", presented at the Council for the Development of the Regions and National Infrastructure to the President of Bulgaria (with [link](#) to InteliAgro website), Apr 7th, 2015;
2. "InteliAgro Statement on Reflections on the Beehive Restrictions in Settlements" (see [link](#)), June 4th, 2015;
3. InteliAgro prepared on behalf of BBAB a "Proposal in Connection with the Option to Review the Coupled Support Scheme for Beef Cattle and Heifers from 2016"
4. Statement regarding the participated in the "Modernizing and Simplifying of the Common Agricultural Policy (CAP)" initiative of the European Commission (May 2nd, 2017);
5. Two official statements as part of InteliAgro participation in the working group for sub-measure 16.1 "Innovations" of the Rural Development Program.

¹⁰ Recommendations considered or adopted by the public sector, civil society, and farmers' community; advisory role to decision makers and farmers; awards granted; publication in or citation of publications in public testimony and the media that influences the policy debate and decision-making; website and digital presence (the quality, accessibility, maintenance of the organization's website, as well as, the quality and level of the digital traffic and engagement (the quality, accessibility and navigability of the website, number of website visitors, page views, time spent on pages, "likes" or followers)); and success in challenging the conventional wisdom and standard operating procedures of bureaucrats and elected officials.

InteliAgro completed that indicator but they also identified a weakness that they often lacked the resources and competence to address all legislative issues that aroused in the sector as they needed a contributing expert they can work with and this happened close to their project end.

With this said, InteliAgro shifted their focus towards activities that are much more private sector-related to potentially higher impact on individual producers like expansion of the consultancy business of InteliAgro Llc, extending the Foundation board to include contributing professionals, active search for funding mechanisms from EU funds (like Horizon 2020). With that they would expect higher contributions and providing support the Foundation to be able to keep the expert activities.

CAPA developed the models as an important and strong tool for analysis in agriculture. Its main advantage is quantifying the results and effects from the complex internal and external economic and policy environment and projecting the future evolvement of industries subject of the analysis. It is a completely new approach in this area of economy and this is the major achievement of the approach.

building upon this achievement, CAPA started to build awareness and promote their work and established a reputation for its analytical capacity. In terms of policy work the following can be considered:

Organization of Outlook Events with support by the MoAFF, the Bulgarian Association of Agricultural Producers (2014 and 2015), National Grain Producers Association and Embassy of the Kingdom of the Netherlands in Bulgaria (2014) and where all stakeholders were invited and the outcomes from the project were presented.

A Memorandum for Support with the MoAFF was signed, where the role of the Ministry to sub-serve for delivery of results from the project was constituted as well as their intention to strengthen the practical value of the analysis implementing them into their policy decisions. There is no further evidence of how this Memorandum was implemented.

3.4.2. Website and Digital Presence: publication in or citation of publications in public testimony and the media that influences the policy debate and decision-making

Website presence and media work have become a powerful tool for both organizations. Both organizations have gained credibility and become quite popular through their websites, materials published there but also numerous articles published in other media and interviews in internet sites, printed media, and radio and TV programs.

InteliAgro: The articles published by InteliAgro on their website were largely reprinted and used by different organizations. InteliAgro also produced a regular publication with its list of subscribers reaching 400 by the end of 2017.

InteliAgro articles covered a variety of topics with most of them (48%) focusing on market overview.

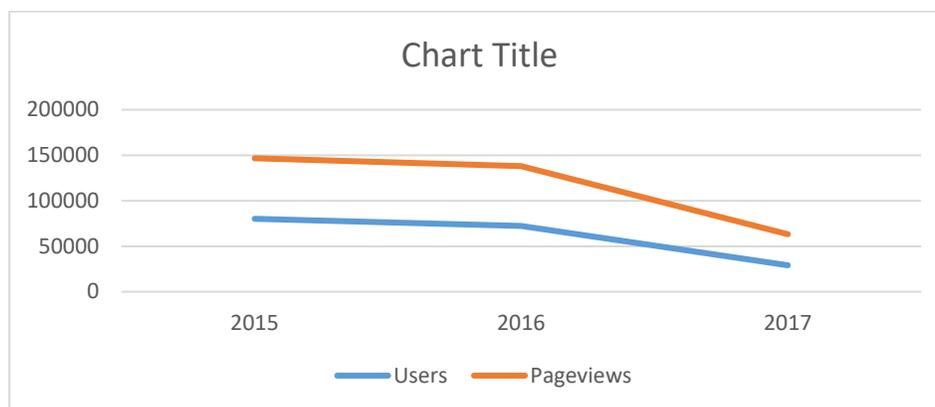


Figure 12. Number of website visits and page views, annually (2015 – 2017)

The reason of the decreasing trend in 2017 is because of the Google ap grant that has been used in 2015 and 2016. Meanwhile InteliAgro also used the social media with increasing number of followers (beginning with 400 in 2016 to get to quadruple the number at the end of 2017). This could be seen also on the chart below as currently the biggest number of visits come from referrals from social media.

The website statistics show significant traffic on InteliAgro website with the following distribution:

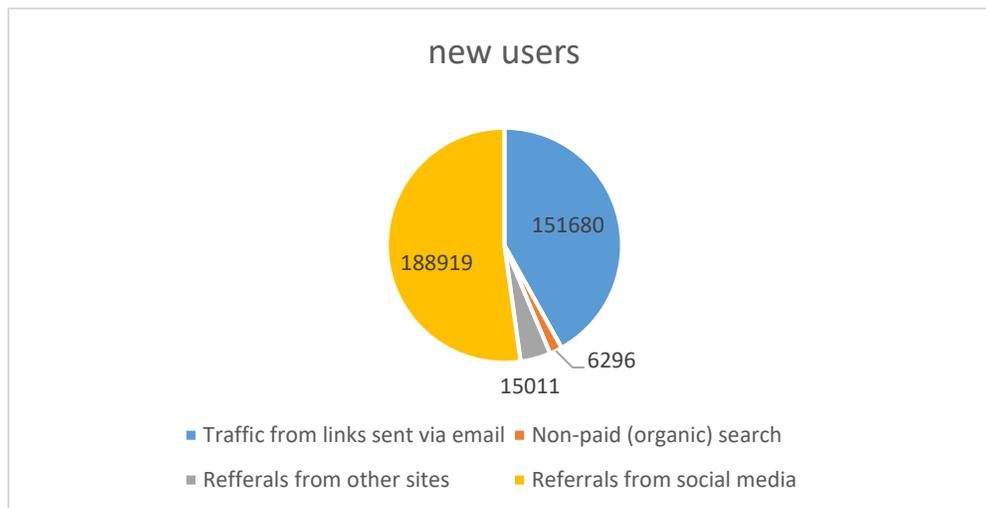


Figure 13. Website Statistics Based on Traffic on the website (google analytics)

The figure presents the activity on InteliAgro webpage based on data from Google Analytics for the period of the project (Jan 15th 2015 – Feb 15th, 2018). The statistics are derived based on analysis of the traffic channels – genuine search, referrals from emails, social media, etc. It could be concluded that most of the referrals come from social media, followed by the emails sent by InteliAgro which verifies their strategy to continue to be active in both.

In late 2017¹¹, InteliAgro identified the need for a new website with more functionalities to justify paid subscription. It was expected the new site to be launched by mid-2018.

CAPA launched their website in early 2016 and statistics show that the total number of visitors for the period 03.2016 – 06.2018 is 28 767. The average number of visitors per month is 1027 and the page-views for each webpage on a monthly and annual basis is 240.

There is a need to improve their web-presence and upgrade the website to be more readable and user-friendly as well as to offer news and pieces of information more often in order to increase the rate of visits. Social Media accounts could also support the increase of traffic.

4. Specific Examples of GOB Decision Making (based on the advice/recommendations of the two approaches)

The two organizations differ in the way they have formulated their goals and activities.

4.1. From the very beginning, the **InteliAgro** Foundation defined its advisory function as one of its goals in order to provide advice in policy development and act as a bridge between business and administration. (To support better governance of the sector by building constructive dialogue between business and

¹¹ A survey of subscribers asked them what kind of information they need, whether they would be willing to pay and how much would pay

administration). One of their activities was to prepare and submit to relevant bodies official statements on draft laws and the allocation of state budget.

It took time and a development effort before the name of the organization was recognized in the sector.

Some specific examples for the work of InteliAgro include:

- ✓ The position statement with regard to Subsidized support related to production levels – elements from the position were subsequently enshrined in the normative documents (raising the yields for some crops, dropping and reducing rates for certain crops);
- ✓ The position statement developed regarding the Ordinance and the Evaluation Criteria under sub-measure 16.1 of the Rural Development Program, parts of which were subsequently laid down in the new draft regulation.
- ✓ The analysis and review of the foreign experience of hail storm systems commissioned by the National Association of Grain Producers in their effort to protect their members from excessive tolls per hectare of arable land, the information from which is expected to be taken into account in the formulation of legislation related to this topic.
- ✓ The overall partnership with the Breeders Association in Bulgaria, the analysis of the meat sector and a statement on the tied support for the sector, thanks to which the support budget for animals under selective control for meat bovines was separated from that for dairy farmers.
- ✓ Another example that can be highlighted in favor of InteliAgro's influence among industry organizations is the BCAP initiative they organized in 2017 on the future of the EU's Common Agricultural Policy beyond 2020 which, in addition to bringing together representatives of almost all active branch organizations in the agro-industry, has caused many of them to "start up" and prepare their positions before the end of the year. This is an example of how InteliAgro brought together different players and fostered them to work as a team and prepare positions for upcoming policies.

Evidenced also by the qualitative data, InteliAgro has developed as a brand and gained reputation of professional team who come out with very critical and objective positions among the stakeholders (farmers' organizations, media but mostly MoAFF) which makes them unpopular and unsupported by the policy-makers. InteliAgro tried to work in the area of policy making as they kept providing positions and statements backed and justified by their analysis. Still the impact is limited as very few of their statements have been adopted.

Along with efforts to participate in public policy making, InteliAgro has also gone through various experiences working with the farmers' (Branch) organizations. These transformations are due to the mode of operation of InteliAgro. The interviews with these organizations also supported the conclusion that InteliAgro work to the highest professional standards and quality and they sometimes are unpopular for the supported positions which do not necessarily coincide with the goals and desires of the organizations. Thus InteliAgro has been shifting their focus towards less policy development work and direct efforts to support farmers on marketing and production rather than regulatory and policy issues.

4.2. The formulation of **CAPA** goals and their set-up is quite different from InteliAgro – to establish a markets and policy analysis group that conducts systematic assessments of market and policy evolution and to evaluate the impacts on farmers, consumers, trade, and the agribusiness industry and to build a country specific model for 4 main sectors in Bulgarian agriculture. The second phase continues to build upon the results of the first one. The project succeeded in that effort and was able also to promote the model and analysis.

Some of the specific achievements of the project additionally to the model itself are:

A preliminary assessment of the 10th year EU membership impact on the Bulgarian agriculture. The results from the analysis were published in the "Agrozona" Magazine along with presentations at several events; one was the CAPA Outlook on November, 2016. Based on the analysis and thorough research on the CAP

impact on agricultural development, structural and sector changes, the team drafted a proposal for the prospects of reforms on I Pillar over the new policy period after 2020. There is no information what was the outcome of the document.

5. Evidence for Improved Productivity of the Farmers

Evidence for improved productivity of the farmers who used the services of both or one organization was sought with both the qualitative and quantitative interviews but it wasn't found with just few exceptions. We consider this to be due to the fact that although both organizations have stated initially in their proposals that agricultural producers are within their direct beneficiaries' groups, later their priorities developed in such a way that there were very few actions directed at producers' level. InteliAgro provided also consultancy at farm level and there are direct results from such interventions. In order for the farmers to increase their productivity they need direct support and consultancy on their operations, business planning (that would include market information). This has been offered limited.

Both organizations defined as their direct beneficiaries the agribusiness organizations (companies operating in the sector), branch organizations, media who spread the information among their users. This could be also justified by the documents reviewed and the list of subscribers to their editions and bulletins – the organizations related to the sector rather outnumber individual farmers.

There are several examples worth mentioning.

InteliAgro. There are two examples of consultancy services provided to farmers in their operations which lead to increased productivity:

InteliAgro provided consulting services to the farmer Ivo Genchev. The consulting included advice and assistance in choosing land, choosing the most suitable crops, constantly providing information regarding production and market information about the fruit markets. Thus, the farm, which was started from scratch, grew to a size of 70 acres in 1 year.

InteliAgro consulted and consequently developed good working relationships with "AgroES" company from Montana, managed by Stefan Dervishev – dealer of the tractors and coupling equipment of the Japanese company Kubota. Thus, the company expanded and enriched its service portfolio.

CAPA. Undoubtedly, the Centre's greatest achievement is the development and maintenance of econometric models to forecast production and prices of the main agricultural crops in Bulgaria. Regular input of information in such models and fine-tuning of the models are central to the work of the experts. The results obtained by using the models are analyzed and published in the regular bulletins and reports of the Centre. The bulletins are provided to media, who widely disseminate the information to the interested audience of farmers and producers and traders of agricultural products. In this sense, it can be asserted that the activity of the Centre for Economic Analysis of Agriculture indirectly contributes to increasing farmers' productivity by regularly providing them with detailed and thoroughly analyzed specialized information about the production and markets of grain and oleaginous crops, vegetables, milk and dairy products, and meat. Each report contains forecasts for the development of the production and the trade in the relevant crop, and specific product balances by commodity. There is no evidence though and feedback if this information helps productivity increase.

The CAPA's team uses design modeling and partial-equilibrium sector models. The models are developed and maintained extremely professionally and are continuously improved by including new variables. The experience with such models in Bulgaria is relatively limited and the efforts of the Centre shall be encouraged and supported in the future. Moreover, such information will always be in demand, and will even expand and become more comprehensive.

6. Comparison of the Success and Deficiencies of the Organizations. Efficiency. Prospects for Sustainability

6.1. InteliAgro

6.1.1. Success:

✓ InteliAgro accumulated very strong expertise, became well known in the sector, well introduced and recognized within professional circles, established an image as a source of quality information that is politically independent. InteliAgro has taken a specific niche in economic analyses and market analyses where traditionally information is insufficient. The information articles and materials they produce are well explained, clear, concise and accessible, with figures and infographics – in an environment where information is mostly read on mobile devices (different numbers shared by on-line media but more or less about 50% of their users use mobile devices – smartphones and tablets).

✓ A strength that is emphasized is that the analyses and materials they develop are very independent, without having the pressure to be politically correct – “they are not afraid to criticize European or Bulgarian agricultural policies” – as interviewed stakeholders referred to InteliAgro. They have become quite pragmatic in their analyses and publications. The annual publication they produce is of excellent quality.

✓ Another strength is that InteliAgro has developed a variety of services besides economic analyses; they have the capacity to offer consultancy and training. They have tried different services and could plan a balance and thus shift to for-profit services. Moreover, in 2015 they realized they need a new entity in order to have for-profit activities (due to legislative restrictions to NGOs to have commercial activities). The new entity started providing paid services – for example project development consulting for farmers who wanted to apply for funding under the Rural Development Program (EU funds).

✓ The major strength of InteliAgro is its team – the organization has managed to recruit and retain quality staff that has the capacity to cover different services and needs.

6.1.2. Deficiency

✓ InteliAgro was successful in establishing a network of experts and use them when needed, but it became difficult to manage it. That network did not prove to be reliable either. The major was taking tasks and not fulfilling them on time or with the desired quality standards, “stealing” customers, etc. InteliAgro stopped working with some of the experts and limited their extension services.

✓ A deficiency that also could be a positive thing is the fact that InteliAgro has two hats. It was established as an expert organization and started operating as such. But the project also included activities to generate revenues – like for-profit consulting or paid services to develop certain analysis. Though complementary, sometimes these could be contradictory and “consume” the time and resources for their other activities. The analytical activities and the production of analyses and publication rarely generate revenues, but bring a lot of publicity.

6.1.3. Efficiency

InteliAgro has managed to fulfil the output and results indicators as well as their financial contribution indicators but namely:

Activities for self-sufficiency

InteliAgro made constant efforts to accumulate financial resources to be able to continue operations after the end of the project. The business activities were mostly demand driven and can be separated in five main categories, with the following shares in the total income:

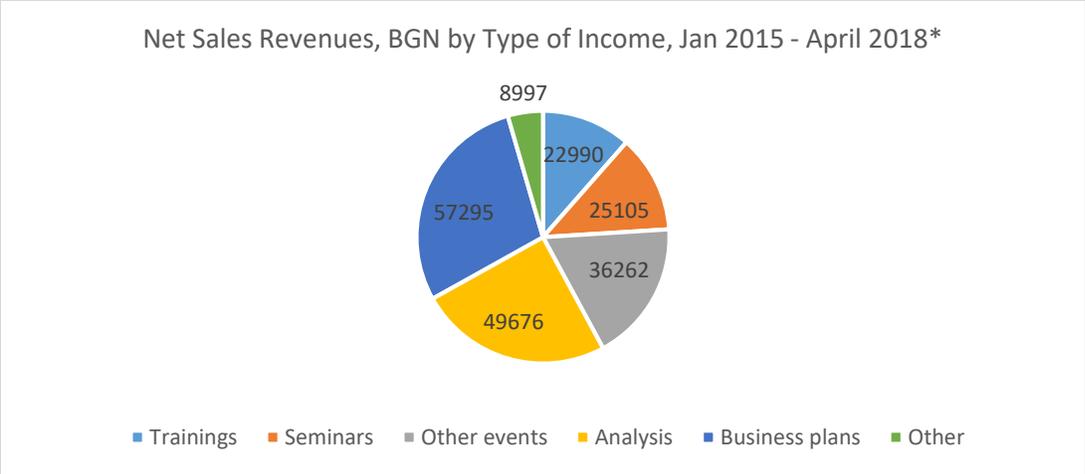


Figure 14. Net Sales Revenues (BGN) by IntelliAgro, source IntelliAgro report

* Includes revenue of both IntelliAgro Foundation and IntelliAgro Llc. for the period Jan 2015 – Feb 2018
 IntelliAgro has been able to generate income from several services they provide as there have been different trends in increase depending on the needs and the market. For example, the revenues from trainings remained unaltered, the revenues from seminars increased in 2016 and decreased in 2017. On the contrary – the revenues from analyses increased in 2016 and remained on the same level in 2017, while the revenues from business plans kept increasing.

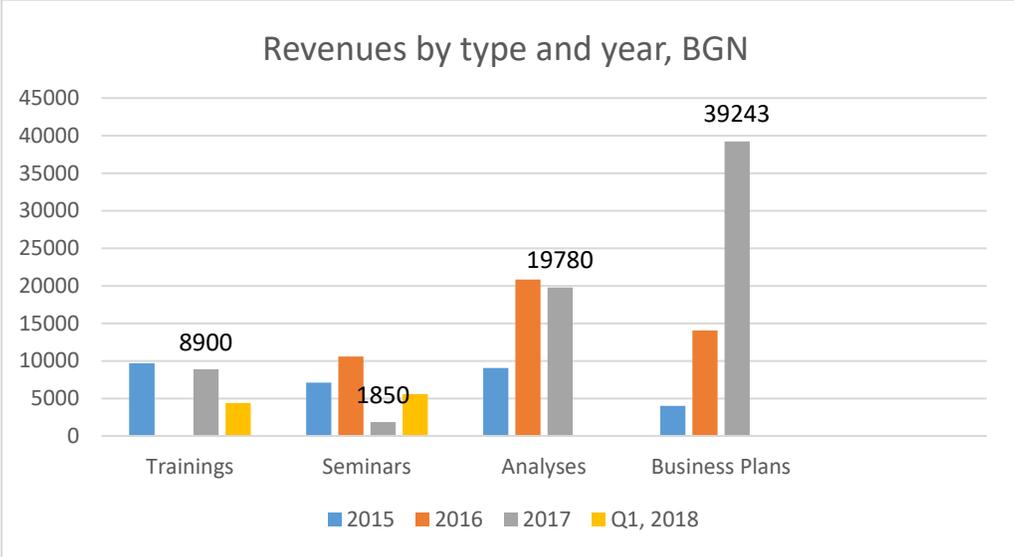


Figure 15. Revenues by type and year, BGN

In terms of revenues the top 3 contractors of IntelliAgro are¹²: Embassy of the Kingdom of the Netherlands – 35,338 BGN; Liman – 8 (an agricultural producer) –26,496 BGN and EFG Eurobank Bulgaria (Postbank) – 18,970 BGN.

¹² Based on Final Report

InteliAgro Book is also generating revenues in advertising (12,600 BGN in 2018 compared to 3,100 BGN in 2017).

By the end of the reporting period (15 Feb, 2018) InteliAgro Foundation had in its account BGN 96,493.25 (excl. funds left from the project) and InteliAgro Llc – additional 34,994.24 BGN.

Compared to project budget of 310,000 BGN, InteliAgro has been able to accumulate additional funds of 200,325 BGN, which is almost 65% and demonstrates very good perspectives of sustainability and revenue generation.

Also they have been very efficient because with a staff of two analysts (as the junior analyst joined later) they have been able to cover 3 completely different areas: analysis (economic and legislative statements, policy recommendations), seminars and trainings, and also consulting. For example, for their first year of existence (av. 240 man-days/per year) they have been able to develop 5 analytical documents, 41 articles or average of 10 man-days per piece. If we add though the time for preparation and participation in different events, the number of man-days will drop down.

InteliAgro is successful in generating revenues, but it is difficult to project their income in the future given the volatility of the market and InteliAgro's dependency on project financing and EU funds.

6.1.4. Sustainability Prospects

InteliAgro have dedicated time for planning their future sustainability. They have been planning services for profit that has been offered. The organization has been able to diversify their activities from a clear expert organization to such offering specialized professional research services, consulting, specialized services to industry related organizations (like banks), specialized for fee trainings, etc. InteliAgro is planning on upgrading and changing their website, so it becomes a better instrument in their activities. They still develop and publish specialized analytical sector information. They continue to cover this whole range of activities with the staff they had during the project implementation. To this respect InteliAgro's sustainability prospects are clear in terms of providing for fee services and drifting away from more analytical and "think-type" activities that do not generate income. This way they would likely decrease their pure "analytical" activities to be able to meet their resources needs. That is why, if they have to sustain the level of information provision, participation in the media and development of analytical reports they will need additional external funding, that could be donor generated only. The funding needed to sustain that level is to support the remuneration of one full-time analyst and partial support for office (rent and utilities)/calculated on per staff basis.

6.2. CAPA

6.2.1. Success

The major success of CAPA project has been the introduction of modeling approach in agriculture as an important analytical tool. Further, they have succeeded to supply enough information to constitute the statistical lines. In this relation, one of the exclusive achievements of the CAPA is that Bulgarian models are not an automatic transfer of FAPRI model to Bulgaria, rather the elaboration of specific and corresponding to Bulgarian reality models, using the state-of-the-art principles and concepts of model work adopted by FAPRI. With the second project, CAPA has continued to gain expertise and reassure their achievements in modeling. CAPA has also been a regular partner to media and continue to publish their special reports and bulletins, which are then publicized in different media. Through the models and as a result of the cooperation with FAPRI, CAPA started cooperation with similar institutions across Europe (Ireland, Netherlands, Poland). Thus, CAPA becomes known and the opportunities for future international collaboration and commitments broaden.

The Centre is a long-term project implemented within the framework of the Institute of Agricultural Economics. Its strengths are associated with the professionalism and activity of Associate Professor Bozhidar Ivanov, and the team also gains recognition from the "host" Institute. The Centre has developed

and operates a unique product, and this is its greatest advantage. The Centre is also proud of its independent status in the sense of absence of engagement with private interests through corporate donations. Because of the symbiosis with the Institute of Agricultural Economics, the Centre’s team does not need to put efforts in solving a number of everyday, administrative and financial issues.

6.2.2. Deficiency

The fact that CAPA is within the Institute on Agricultural Economics is often a disadvantageous circumstance. Due to this coexistence, the Centre reports to higher-ranking organizations and institutions and is dependent on the benevolence of their leaders. There is always a risk of malevolent treatment and sudden changes in policy and responses.

Moreover, the CAPA project is just one of the many projects implemented by the Institute – the IAE is a beneficiary under several different programs. Currently the IAE is implementing 3 national and 3 international projects with CAPA even not listed on the website.

The Center besides Prof. Bozhdar Ivanov has no other dedicated staff – there have been other two researches but they are working on the modeling and have absolutely no public exposure and none participates in the public and media events or presentations. Although these staff people are trained they need to become more involved.

6.2.3. Efficiency:

In terms of efficiency, the project started with a “large investment” in building the model and training the staff. Although the project is achieving its objectives and the activities have been implemented, efficiency in the short run is rather low, compared to the project budget and targets:

Below are the financial targets and results of CAPA:

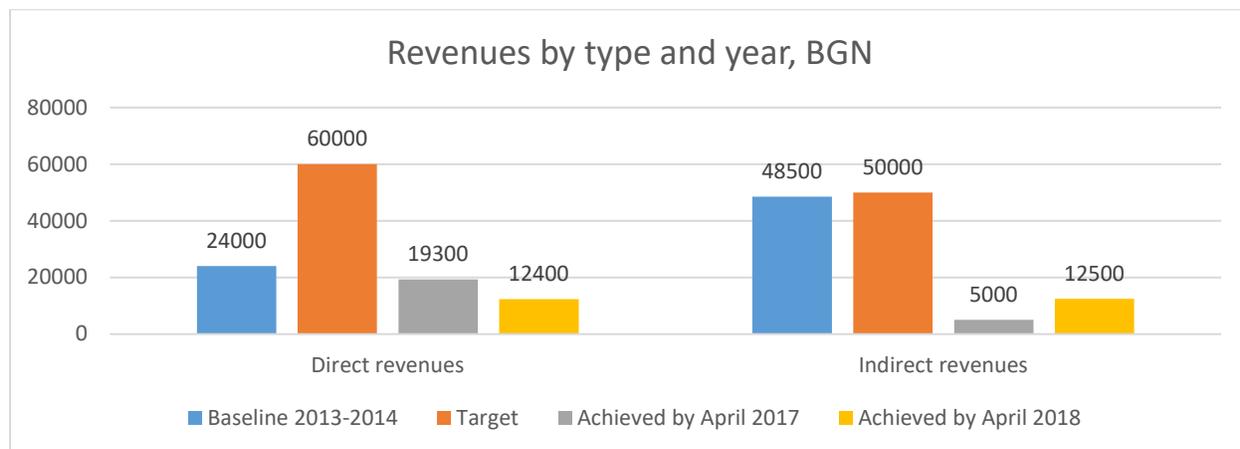


Figure 16. Revenues by type and year, BGN

Since CAPA is functioning within an institute, which is funded under the budget of the MoAFF, their capability to attract funding is rather limited and the unit itself cannot be registered as an independent commercial entity. Thus, the experts from the unit are sometimes contracted as individual experts. There have been 4 contracts signed through the IAE with “Louis Dreyfus” company, Dutch Embassy, and a Bulgarian member of the European Parliament; Sogeti, Luxemburg (joined their consortium as a subcontractor for implementation of the service by EUROSTAT on updating methodology for setup balance sheets in cereal, oilseed and rice).

The experts have been employed individually by the MoAFF, Rural Development Directorate to do the calculation of all compensatory payments in the RDP 2020 tied to measures “Less Favored Areas”, “Agri-

environment”, “Organic Farming”, “Natura”, “Animal Welfare”. Two experts of CAPA were employed by World Bank team to work on the Strategy for development of the irrigation sector in Bulgaria also.

In terms of project budget and generated revenues, they are just 8% of the budget of the two successive CAPA projects, and 21% of the budget of the second phase.

6.2.4. Sustainability Prospects

The sustainability of CAPA is in close relation with the reliability, usability and persuasiveness of the results and information extracted from the model and the outreach to the stakeholders, on one side, but also on the willingness of the hosting institution to further support it. The results of CAPA’s work have been remarkable and well publicized with the second project, but efficiency of such work cannot be very high. CAPA could offer some fee-based services, but it could not be a contractor since it’s not an independent organization. The team believes, though, that it needs to stay within IAE in order to keep its independence from business.

Sustainability could be provided if IAE adopts the CAPA activities to be within its institutional functions and to financially support it. With political changes or budget cuts this may not be the case.

Another option is to seek for external “project” based funding to be able to sustain the model. Then the funding will have to support the functioning of a team of experts to sustain the model and produce media materials and analyses. Unfortunately, there is no true market for data and informational services. If the model does not exist, the need will be filled in by statistics from the agricultural statistics system (SAPI) which is being criticized by the stakeholders as unreliable or by statistical data that is informally gathered by branch organizations – very unprofessional in fact.

A certain risk in this respect is also that CAPA operates with a very small team and just one team member is publicly associated with the activities and media appearance: CAPA’s sustainability is strongly connected with an expert on the team. This makes their sustainability prospects rather low.

7. Symbiosis of the Two Organizations

The study found many examples of joint activities within projects of both organizations, mostly participation in events and presentations at each other’s’ events. Other examples for collaboration are their presence in media and participation in interviews. Still the impression is that these are separate organizations although funded by the same donor. The joint activities are extensively listed in their activity reports.

Still, based on the qualitative information and case studies, the impression is more of a formal collaboration between colleagues in organizing and attending public events, moderating individual sessions and the like, without actual interaction aimed at achieving common goals.

8. Competitors of the two ABF-supported organizations and comparison of their capacity and impact

The issue of competitive organizations was studied through qualitative interviews and case studies. The organizations themselves were also providing self-evaluations and comparisons in terms of organizations providing similar services and activities.

Findings:

8.1. InteliAgro: There are some similarities and the notion for competing organizations mostly with the Institute for Agro strategies and Innovations.

The Institute for Agro strategies and Innovations (IASI) is an NGO founded in 2014 which gets together professionals in agribusiness, food processing and investment in the area of agriculture in their expert capacities. Among the main goals of the Institute is to provide information and educate the sector on what is happening at national and European level in the field of agriculture and rural development policy – data, statistics, opportunities and critical factors. The analyses are intended to help both the Bulgarian business with its future plans and initiatives as well as the Bulgarian politicians and administrations in the decisions

they take in striving to provide a sustainable and predictable environment for the development of agriculture and the agro-food industry. The institute was established as an expert team with a clear focus on the EC policy on agriculture and provision of independent expert opinion and analysis. The Institute is chaired by Svetlana Boyanova, a former politician and agribusiness professional.

InteliAgro and IASI have been collaborating for certain events focused on CAP (described in the previous sections). Still, there is a clear distinction as the services and activities of InteliAgro have a clear economic focus, while IASI has more policy-related context. IASI gets funding from EU programs and donations.

In terms of capacity (mostly personnel and knowledge), IASI is in a far better situation being able to use the time and services of their board members, who are professionals and business owners in agriculture and food processing industry: the executive director of the union of fruit and vegetable processors, the Chair of Bioselena (an NGO supporting bio production in agriculture) a former chair of the Association of Agricultural Producers, an investor and entrepreneur in agriculture and winery, the executive director of a large agricultural holding. IASI has also a team of 3 or 4 people. Thus, the analytical efforts are spread between the board and team.

8.2. Other similarities (and thus competitors) for both InteliAgro and CAPA could be found among websites and portals (Agroportal, Fermer.bg, Agro.bg, etc.), industry business associations, National Agriculture Forum and others. These similarities are just related to the activities of information provision though both organizations differ in what they do.

8.3. In terms of competition the heads of the two organizations did not give sufficient clarity about their assessment of the competition and the market environment in which they operate. The general impression was that the organizations evaluated are not sufficiently interested in their competitors. Still InteliAgro have a clear vision on their future development and building on their analytical expertise and agriculture sector knowledge they focus more on their business services and less on policy formulation and advice to government. CAPA is in a slightly different position as they are part of the government and sometimes they participate as experts in concrete calculations for support schemes.

V. Conclusions

The conclusions summarized based on the goals of the evaluation are as follows:

The purpose of the evaluation is to study the implementation of the approaches listed above and the results achieved. The main objectives of the evaluation, as stated in the RFP are:

✓ Effect of the analytical efforts of InteliAgro and IAE on the farmers' and Government of Bulgaria (GOB) access to quality information, analysis and advice; Impact of both organizations on the decision-making of farmers and agribusiness firms and the program and policy decisions of the Ministry of Agriculture, Food and Forestry (MoAFF);

All projects have been implemented as planned and outputs achieved. The two approaches and organizations were launched and for a short period of time succeeded to gain awareness and become popular among stakeholders and media as a trusted analytical organization to provide independent advice and analysis on agriculture.

InteliAgro has tested different approaches – along with the pure analytical activities they have been involved also in providing statements on legislation, translating policies to the government and acting as a bridge between the industry and government. Not all of these have been very successful mostly due to the fact that InteliAgro needed a focus, on one hand, and on the other, being very objective and straightforward in their analyses and materials, they are not fully accepted by politically engaged branch organizations or the government. Still they are very successful in their analytical and advisory capacity as they have been recognized as neutral and objective by all stakeholders.

CAPA has been involved more in developing the models and feeding the data and as a secondary activity – in providing the results from the model to different stakeholders. One of the team members is a recognized professional and is often invited by media or the results in their bulletins are being published. CAPA’s website is not very well maintained which is a problem.

Based on the assumptions in the report (section 2 and 3) both InteliAgro and CAPA have significantly captured farmers’ attention and have achieved considerable outreach. Both organizations have produced numerous analytical reports, articles and bulletins with information. Their analyses have been published by different media, websites, branch organizations, and thus received a wide outreach.

Both InteliAgro and CAPA have been recognized by all groups of respondents in the surveys – branch organizations, NAAS regional offices and farmers. They rank low though when respondents are asked to rank different sources of information. All respondents rank first the governmental institutions – typically the Ministry of Agriculture, the State Fund Agriculture and branch organizations.

Both organizations have been successful in providing quality information, analyses and advice to farmers – either directly or through media and agricultural associations. In terms of providing advice to the Government, InteliAgro has developed numerous positions and statements but only few of those have been taken into consideration. CAPA’s experts have been invited to work as consultants for certain government tasks, but besides that there has been small impact.

For all projects it could be stated that they included goals focused on impact (the whole agricultural sector, all farmers, etc.) lie level like improving the competitiveness of the Bulgarian agricultural producers were set at macro level targeting a broad audience. In this regard, there is no direct evidence that the projects have influenced the productivity or competitiveness of the whole sector.

✓ Sustainability prospects of the organizations, assessment of the two approaches in terms of sustainability and efficiency

InteliAgro have dedicated time for planning their future sustainability. They have been planning services for profit and has tested those. The organization has been able to diversify their activities from a clear expert organization to such offering specialized professional research services, consulting, specialized services to industry related organizations (like banks), specialized for fee trainings, etc. Early on they have established a for-profit entity to be able to generate income as there were legal barriers for a NGO to generate income. After the project end they continued to cover this whole range of activities with the staff they had during the project implementation and even recruiting new staff. To this respect InteliAgro’s sustainability prospects are clear in terms of providing for fee services and planning better to be able to sustain the more analytical and “think-type” activities that do not generate income. There is a possibility though that they decrease their pure “analytical” activities to be able to meet their resources needs. That is why, if they have to sustain the level of information provision, participation in the media and development of analytical reports, development positions and statements on legislation they will need additional external funding, that could be donor generated only.

InteliAgro and the independent Think Tank Approach they represent is more feasible and flexible, as well as with much bigger prospects for sustainability. It comes from the fact that they have a variety of activities and can complement what they do, as well as they are trying revenue generating services and based on experience, they are building on the best models. Another reason is that being independent – not related to a government institution (like CAPA) that have more freedom of being objective and critical and sometimes not supported by branch organizations or the government institutions.

In terms of efficiency, InteliAgro has been very efficient as they have been pooling their resources and expertise to cover different activities with a limited number of staff with very high quality though which potentially leads to overload.

CAPA's approach is more conservative because they are part of a state governed institute. This is, on one hand, providing them independence from financial interests, but on the other, making them more vulnerable to political changes and limiting their sustainability options.

The sustainability of CAPA is in close relation with the reliability, usability and persuasiveness of the results and information extracted from the model and the outreach to the stakeholders, on one side, but also on the willingness of the hosting institution to further support it. The results of CAPA's work have been remarkable and well publicized with the second project but still CAPA could not rely on pulling together external recourses or offering for-fee services, since it's not an independent organization. This is demonstrated also by their ability to attract external funding which goes to about 10% of their budget.

There are few options for providing sustainability: it could be provided if IAE adopts the CAPA activities to be within its institutional functions and to financially support it. With political changes or budget cuts this may not be the case.

Another option is to seek for external "project" based funding to be able to sustain the model. Then the funding will have to support the functioning of a team of experts to sustain the model and produce media materials and analyses. Unfortunately, there is no true market for data and informational services. If the model does not exist, the need will be filled in by statistics from the agricultural statistics system (SAPI) which is being criticized by the stakeholders as unreliable or by statistical data that is informally gathered by branch organizations – very unprofessional in fact.

A certain risk in this respect is also that CAPA operates with a very small team and just one team member is publicly associated with the activities and media appearance: CAPA's sustainability is strongly connected with an expert on the team. This makes their sustainability prospects rather low.

Given the different profile and comparative advantages of the two institutions, under the appropriate conditions the America for Bulgaria Foundation could propose an option for pooling the efforts of the two expert teams and seeking complementary activities. As far as we became aware in the course of the study, such discussions of future opportunities for cooperation in specific areas have already been held between Nikolay Valkanov and Bozhidar Ivanov. In the opinion of the evaluators, these issues need to be carefully discussed and joint initiatives and projects need to be encouraged, especially bearing in mind that this is the trend in the non-governmental sector in Bulgaria in the current conditions of limited funding and lack of expert resource.

✓ Recommendations on the feasibility of replicating the models for strengthening the analytical capacity of other sectors of the Bulgarian economy.

Both models have demonstrated success and deficiencies as described in the report. In the short run the independent foundation approach proves to be more feasible in terms of being flexible and able to support the analytical and policy development activities through for-fee services.

The Governmental research institute approach has also been very successful in terms of providing a solid ground (and model) for economic analyses and provision of high quality information to agribusiness. With its further development and expansion, it will continue to provide valuable information to agribusiness.

Both approaches have gained awareness and are recognized by stakeholders. Both approaches have been very valuable in setting the ground and providing high quality information and analyses to the agribusiness sector. They have not succeeded though in their work with the government not because they have not tried but the environment has not always supported that.

A positive but to an extent a negative fact is that both approaches are very much dependent on their team-leaders which is a crucial factor if such a model is to be replicated but also in sustainability.

Definitely both approaches are needed as there is still a recognized need of timely and adequate statistical information, analyzed to fit the needs of different producers. If the model is to be replicated our recommendation is that a combination of both approaches is considered.

Recommendations for each organization

InteliAgro has been restructuring and refocusing their activities in order to survive. Although quite difficult to operate on the small and subsidy dependent market, there is certainly a need for high quality well targeted services. In this respect, InteliAgro could be more active in searching partners to attract project funding from EU donors in cross-cutting topics like agriculture and environment, innovation, data collection.

InteliAgro could also focus on developing, branding and doing their specific trainings to small groups of trainees. There are networks they can relate and platforms they can use for marketing and collaborate with different service providers.

Since the survey reveals that many farmers use the internet to find out information, InteliAgro could make short pieces of information with infographics and simple recommendations for wider use. This way they may further increase their outreach.

Collecting fees for their analyses. InteliAgro could publish resumes of the analyses only and the whole document to be available after payment of fee. This is certainly an applicable measure for CAPA as well.

CAPA needs to develop a communication and publicity plan with very specific measures and to try to implement it. The website needs to be remodeled and rearranged to be user-friendly and more attractive. Resumes of all reports could be done and published while the reports themselves should be downloadable upon payment.

The resumes and newsletters could be designed in a more user-friendly way with infographics and information written to be easier to understand layout of the information.

CAPA needs to include activities and open to social media. CAPA needs to work on its administrative capacity and also on including all team members in events and media presence.

Annex 2. Detailed Evaluation Methodology

The evaluation methodology was developed during the initial implementation phase and was coordinated with the ABF evaluation team. The methodology is built upon using the following combination of methods shown in the figure below:

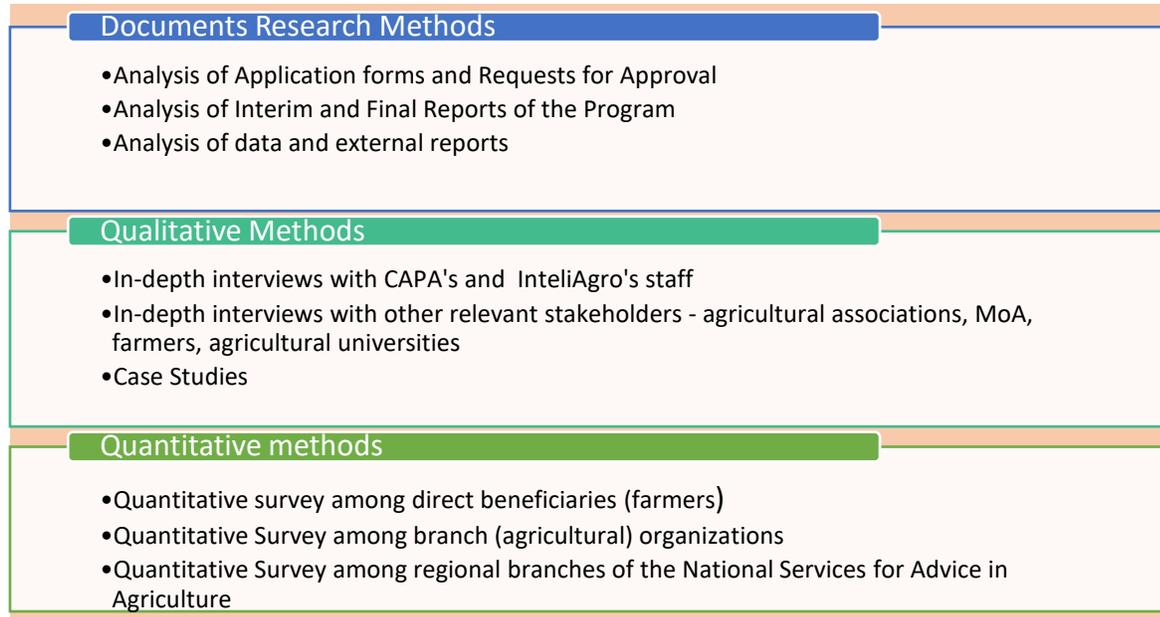


Figure 17. Evaluation Methods

The evaluation team used a multi-methodology approach for conducting the Evaluation with both qualitative and quantitative methods applied as well as desk research.

Documentary Research Methods:

As part of this method all relevant information (primary and secondary) was collected and analyzed. It included variety of sources and reports including the following:

Grant proposals – Application Forms and Requests for Approval; Interim and Final Reports for implementation of the approaches; Publications of both organizations; Specific publications on agricultural sector development; Agriculture related program documents and sector analyses – evaluation reports and planning for the EU funded Program for Rural Development (2007 – 2014 and 2014 – 2020); Policy documents and strategic papers related to agriculture; Different Surveys and studies related to agriculture, NSI and Eurostat reports, etc.

Qualitative Methods

The qualitative methods that were used included in-depth interviews and case study.

In-depth interviews. This method focused on conducting interviews with open-ended questions orally by following interview guide and recording respondent's answers. It was used to obtain information that is more detailed and to have more arguments supporting the key findings of the evaluation and impact assessment. The instruments were developed using the main evaluation questions and coordinated with ABF Team. Then a list of stakeholders was developed and coordinated with the ABF Team.

Survey instrument: guide for in-depth interviews. The fieldwork started after the final approval of the instruments from the ABF team.

There were several interviews conducted with both organizations – at the start of the process, during case studies and also by closing the research process.

Additionally there were the following interviews conducted with different stakeholders and the two organizations:

| In-depth Interviews with Stakeholders | Number of interviews conducted |
|-----------------------------------------------------------------------------|--------------------------------|
| Branch/Agricultural organizations | 8 |
| Farmers (grouped cereal and oilseeds; meat and dairy; fruit and vegetables) | 14 |
| Ministry of Agriculture, Food and Forestry | 5 |
| Agriculture Specialized Media | 4 |
| Agriculture Universities | 1 |
| Agriculture Related Business | 5 |
| InteliAgro | 3 |
| CAPA | 3 |
| ABF Team | 1 |
| Total number of interviews | 44 |

Figure 18. In-depth Interviews conducted

Case studies. This method is based on an in-depth study of a selected case/case by considering many different countries and therefore requires a relatively high resource cost. Case studies were intended to be used for the analyses of Evaluation questions: 4, 5 and 6. There were a total of 5 case studies conducted.

Quantitative Methods:

In order to estimate the main characteristics of the impact of the InteliAgro and the Center for Agri-Policy Analysis (CAPA) work on the farmers’ access to quality information in Bulgaria, three quantitative surveys were conducted: among farmers, branch organizations and representatives of the National Agricultural Advisory Service. A short description of each survey main characteristics could be summarized as follows:

1.1. Quantitative survey with farmers

The survey is based on a random sample of farmers stratified by the *holding size* (medium, large and very large), the *sector* (cereal and oilseeds, dairy and meat, vegetables and fruit) and the *statistical region* (NUTS2) in which the farmers carry out their agricultural activities.

The great territorial allocation of the Bulgarian agricultural holdings (BAH) and the lack of homogeneity in the holdings’ sizes imposed the need for the usage of a sample design that will reflect these specifics. In this case, the most suitable design is the *stratified random sampling* design.

The sampling design included the following steps:

Step 1. BAH population definition: Target population included all agricultural holdings that operate in Bulgaria and are considered to be part of the outreach of the analytical activities of the IntelliAgro and IAE work. Therefore the BAH with standard output size under 8,000 EUR: very small and small holdings were excluded.

Note: Inclusion of small and very small holdings into the stratification process redistribute the sample size so the most of the farmers interviewed were of small size (86% of the BAH population) and a very tiny share for the medium and large holdings covered (14%). It is our assumption that most of the beneficiaries of the analytical activities of the IntelliAgro and CAPA work were medium and large holdings.

Additional survey within the agriculture/branch associations and the district offices of the National Agricultural Advice Services provided information on the behavior patterns and information use of the very small producers (especially the agricultural advice services).

According to the latest available information (2013), the BAH population size is approx. 35,000 holdings.

Step 2. Stratification of the BAH population: The population is stratified by the Bulgarian statistical regions (NUTS2) and the holding size (Medium/Large/Very large¹³) as follows:

Table 1.1. Agricultural holdings by statistical regions and holding size

| Holding size | Total | Statistical region | | | | | |
|--------------|---------------|--------------------|---------------|--------------|--------------|--------------|---------------|
| | | North West | North Central | North East | South East | South West | South Central |
| Total | 34,983 | 4,565 | 5,092 | 5,450 | 6,032 | 4,823 | 9,021 |
| Medium | 20,905 | 2,331 | 2,858 | 3,148 | 3,319 | 3,316 | 5,933 |
| Large | 9,249 | 1,324 | 1,315 | 1,353 | 1,722 | 1,218 | 2,317 |
| Very large | 4,829 | 910 | 919 | 949 | 991 | 289 | 771 |

Source: MAFF, Structure of agricultural holding in Bulgaria (2012/2013) and Eurostat

Additionally the BAH population is stratified also by the four main agricultural industries (sectors):

Table 1.2. Agricultural holdings by sector

| Sector | | | | Total |
|---------------------|--------|-------|------------|--------|
| Cereal and oilseeds | Dairy | Meat | Vegetables | |
| 14,023 | 15,636 | 2,074 | 3,250 | 34,983 |

Source: MAFF, Structure of agricultural holding in Bulgaria (2012/2013) and Eurostat

Step 3. Sample size: In order to estimate the population characteristics with a sufficient level of precision (95% confidence level and 6.2% confidence interval) the sample size should be 250 sampling units.

Step 4. Sample stratification: The sample is proportionally stratified according to the information in Table 1.1. as follows:

Table 2.1. BAH sample stratified by statistical regions and holding size

¹³ Holding size definition: medium ($\geq 8,000 < 25,000$ EUR), large ($\geq 25,000 < 100,000$ EUR) and very large ($\geq 100,000$ EUR)

| Holding size | Total | Statistical region | | | | | |
|--------------|-------|--------------------|------------------|-----------------|---------------|--------------|-----------------|
| | | Severo-zapaden | Severententralen | Severo-iztochen | Yugo-iztochen | Yugo-zapaden | Yuzhententralen |
| Total | 250 | 33 | 36 | 39 | 43 | 35 | 64 |
| Medium | 149 | 17 | 20 | 22 | 24 | 24 | 42 |
| Large | 66 | 9 | 9 | 10 | 12 | 9 | 17 |
| Very large | 35 | 7 | 7 | 7 | 7 | 2 | 5 |

Source: Calculations

According to the 1.2. the additional sample stratification is as follows:

Table 2.2. BAH sample stratified by sector

| Sector | | | Total |
|---------------------|----------------|----------------------|-------|
| Cereal and oilseeds | Dairy and Meat | Vegetables and Fruit | |
| 100 | 112 | 38 | 250 |

Source: Calculations

Step 5. Random sampling by strata.

The stratification was done proportionally to the number of farmers in each stratum in the population (approx. 35 thousand holdings). The farmers in each stratum were selected using the simple random sampling procedure. The sample size included 250 units and the number of strata is 21.

Because of the survey time period specifics (19.06 – 25.07.2018), concerning the intensified agricultural activities of the farmers, replacements of the non-respondents (farmers' holdings that refused participation in the survey) was made using holdings with similar characteristics.

The interviewing process was executed by the means of telephone interviews (CATI) using a questionnaire with 14 close-ended questions (incl. 5 multiple answers) and 4 open-ended questions. The total number of successfully completed interviews is 251.

1.2. Quantitative survey with branch organizations

Initially, the survey was designed to be exhaustive and to include all branch organizations that are registered at the Ministry of Agriculture, Food and Forestry (according to the internet site of the MAFF the total number of branch organizations is 71, the last update is done in 2015).

Afterwards, during the survey conduction process, it was found that the branch organizations are mainly commercially oriented ones and that they execute almost no representative functions. Moreover, it was revealed that more than a half of the branch organizations (39) have no e-mail address or any detailed contact information which brought additional difficulties to survey conduction and made the communication with those organizations impossible.

Invitation letters to the e-mails of 32 contacted branch organizations were sent. The interviews were conducted by the means of CAWI using the LimeSurvey platform installed on a secured server and a SSL certified domain that guarantees a high level of the confidentiality protection of the respondents' data.

Despite all efforts to stimulate the participation of the organizations in the survey and the multiple reminders by means of e-mails and telephone calls, during the survey period (21.06 – 27.07.2018) only 7 branch organizations responded to the invitations and completed the survey (National Grain Producers Association, Union of the processors of fruit and vegetables, Bulgarian Association of Grain and Feed Traders, Association of Meat Processors in Bulgaria, Union of Compound Feed Producers, Union of Rice Producers in Bulgaria, Fishery Producers Association).

The questionnaire included 15 questions (9 close-ended and 6 open-ended).

1.3. Quantitative survey with representatives of the National Agricultural Advisory Service (NAAS)

The 27 regional offices of the National Agricultural Advisory Service are allocated across the territory of the Republic of Bulgaria and in particular at the administrative centers of the Bulgarian districts.

In order to conduct exhaustive interviews with representatives from all regional offices telephone consultations were organized and the aims of the survey were discussed in details.

Despite the refusals for participation of some of the regional offices and the lack of responsiveness of the unit, 20 survey questionnaires were fully completed (Blagoevgrad, Burgas, Varna, Veliko Tarnovo, Vidin, Vratsa, Gabrovo, Dobrich, Kardzhali, Kyustendil, Montana, Pazardzhik, Pernik, Silistra, Sliven, Stara Zagora, Shumen). At three of the regional offices 2 experts from each office took part in the survey.

The survey is a CAWI-based one and it was conducted during the period 09 –24.07.2018 using the same LimeSurvey platform that has been used for the online interviews with the branch organizations.

The questionnaire included 10 survey questions (6 close-ended and 4 open-ended).

Analytical Methods

The data gathered was analyzed using variety of different methods for statistical analyses and expert evaluation. Some of the methods used include Statistical analysis, Data reliability analysis and logical review; Analysis of samples and calculation of maximum statistical errors for each of the confidence intervals. Descriptive analysis, Descriptive statistics, Statistical evaluation and hypothesis verification Factor analysis. Besides the statistical analyses, Case studies and qualitative experts evaluations were used.

The evaluation was guided by 8 evaluation questions included in the RFP:

EQ1. Have the two entities accomplished what they had promised to achieve upon the launch of their projects? If not, what were the reasons?

EQ2. What has been the outreach of each organization in terms of number of farmers and/or organizations?

EQ3. What is the impact of each organization, considering 4 subgroups of indicators:

3.1. Output Indicators:

3.2. Resource Indicators:

3.3. Utilization Indicators:

3.4. Impact Indicators:

EQ4. What are some of the specific examples of GOB decision making based on the advice/recommendations of the two think tanks, if any?

EQ5. What is the evidence for the improved productivity of the farmers who use the services of both or one of the organizations, if any?

EQ6. Compare the success and deficiencies of the organizations based on the different organizational models they have utilized? What is their efficiency? What are the sustainability prospects of each?

EQ7. What has been the symbiosis of the two organizations?

EQ8. Who are the competitors of the two ABF-supported organizations and how would you compare their capacity and impact?

Annex 3. Case Studies

Case Studies

1. Examples of the activities of the two organizations that have influenced a specific government decision.

Examples may include analyses, recommendations, campaigns, advocacy, and more. The examples were selected after interviews with the heads of the two organizations and the study of documents provided by them and web resources.

IntelAgro

An example of such activity is the collaboration between InteliAgro Foundation and the Bull Breeding Association in Bulgaria. After attending several meetings of the Management Board of the Association and having prepared their argumentation on the matter, the Foundation's experts expressed their opinion before the members of the Management Board that under the current regulations there is no reason hindering the *Minister of Agriculture, Food and Forestry* to allocate a separate budget for cattle breeding under controlled selection for meat production. Furthermore, InteliAgro Foundation supported this stance and assisted the Association by preparing a special proposal on the tied aid that the sector receives. Following the meetings between the Association and the Ministry, new tied payment rules were adopted in 2017, based on the proposal by InteliAgro. They are as follows, the measure allocated separately:

- increasing the minimum number of animals in a herd as an eligibility criterion for aid;
- introduction of the eligibility criterion – 0,4 calves per cow per year;
- step rate for aid per animal based on farm size.

2. Another similar example concerns the texts elaborated by the *Minister of Agriculture, Food and Forestry* in 2016 regarding tied aid, except for pumpkins, walnuts, peas and other crops on the aid list, and the increase of minimum yields for which the producers have to provide evidence. The position of InteliAgro's experts expressed in numerous articles and interviews, is that the allocation of tied aid for fruit and vegetables should be revised and distributed more precisely so as to prevent flooding the country with pumpkins, watermelons, walnuts and the like. It is also suggested that the minimum yields for which the producers provide evidence should be increased in order to guarantee assisting the actual producers and to bring the sector to light. There are two links below which provide publications on the topic and suggestions made.

<http://agronovinite.com/nikolay-valkanov-orehi-tikvi-i-dini-sa-novite-kalifornijski-chervei/http://inteliagro.bg/article/103/kakvo-ovoshtarstvo-e-prioritet-vsashnost>

Center for Agro-policy Analysis

Several examples of interactions with the *Minister of Agriculture, Food and Forestry* have been identified in the course of the study. However, it is difficult to define whether these examples present the achievements of the Center's activities solely (regarding its status in the context of the grant from the America for Bulgaria Foundation) or they are due to the fact that CAPA's team is part of the Institute of Agricultural Economics.

Perhaps, the most appropriate example, taking into account all the details, is the Center's contribution to the preparation of the regular market overview reports on the grain market. Between 2015 and 2017, data

regarding the fodder balance of wheat, barley, corn and sunflower has been regularly provided by experts, prepared by the Ministry related to all major crops. This cooperation between the Center and the Ministry is particularly important given that the balances of the main agricultural crops are the main instrument for the implementation of an adequate agricultural policy. In the course of the cooperation, a member of the Center's team was permanently appointed at the Ministry in the relevant department and transfers the expertise and knowledge of the Center in the field of commodity balances.

The Ministry of Agriculture, Food and Forestry has fully adopted the approach and the information provided by the Center for Agro-policy Analysis regarding preparation of forecasts on production and prices of basic agricultural products and regularly uses them.

2. Examples and evidence that the services and activities of both organizations have contributed to improving farmers' productivity.

IntelAgro

The most convincing example is the assistance and consultancy services provided to the farmer Ivo Genchev. The services provided are of a complex nature and include: assistance in land selection, assistance in selecting the crop and constantly providing information on the fruit markets. The farm has reached 70 acres in size, initially starting from 0 acres.

Contacts and collaboration with this farmer date back to 2015. In 2015 Ivo Genchev took up the initiative and expressed the conceptual idea of creating an orchard. After reviewing the soil analysis of his land in Transko, InteliAgro's experts directed him to look for land elsewhere, where the conditions are more appropriate. The farmer selected a plot in the village of Tserovo, Pazardjik. Services provided by InteliAgro include:

- Soil analysis and guidance;
- Providing guidelines and recommendations for working with an agronomist – eng. Krassimir Kumchev, participant in an experience exchange program in the USA under the program Kohan;
- Consultation on the choice of fruit trees (prunes);
- Regular delivery of a fruit bulletin (two-week edition, published regularly until 2017);
- Periodic consultations for possible RDP application, schemes and support measures.

The InteliAgro Foundation still maintains a regular connection with Ivo Genchev, who currently has 70 decares of prunes and 10 decares of lemon balm.

Another example is the collaboration with Nikoloy Shivarov (July 2015-2016). The farmer contacted InteliAgro Foundation because he intended to create an almond orchard for the production of almond oil. He has received the following services: soil analysis by Ivan Mutafchiev, participant in a training program in the USA, soil sample analysis, consultation on saplings and planting (the agronomist together with his team, marks the holes and plants the trees). Approximately 20 decares of Almond Garden were created.

Finally, in 2018 InteliAgro Foundation assisted the farmer Dobromir Domuschiev in the preparation of a business plan for the purchase of a farm of 10,000 decares of arable land. The idea was for this farm to be transformed from conventional to organic one.

Good working relationship was built with AgroES company managed by manager Stefan Dervishev, Montana, dealer of Kubota tractors and equipment. Thus, farmers and farmer alliances who need consultancy services are identified.

Center for Agro-policy Analysis

Undoubtedly, the Center's greatest achievement is the creation and maintenance of econometric models to predict production and prices of the main agricultural crops in Bulgaria. Regular supply of model information and model refinement are central to the work of the experts. The results obtained are analyzed in the regular newsletters and reports of the Center and are widely disseminated by the media to the interested audience including farmers, producers and traders. In this sense, it can be assured that the activity of the Center for Agro-policy Analysis contributes to increasing farmers' productivity by regularly providing them with detailed and profoundly analyzed specialized information on the production and markets of grain and oleaginous crops, vegetables, milk and dairy products and meat. Each report contains forecasts for the development of production and trade in the relevant crop and specific product balances by commodity.

The Center's team uses design modeling and partial-equilibrium sectoral models. The models are developed and maintained extremely professionally and are continuously improved with the inclusion of new variables. The experience with similar models in Bulgaria is relatively limited and the efforts of the Center should be encouraged and supported in the future. Moreover, the need for such information will increase in future.

3. Assessment of the strengths and weaknesses of the development model of the two organizations so far and the prospects for their sustainable development in the future.

IntelAgro

The IntelAgro Foundation is a typical example of a specialized private research institute on public policy issues in the field of agriculture. The organization is still in the early stages of its development, which could be described as experimental. Founder and CEO, Nikolay Valkanov has a clear concept of the strengths and weaknesses of the organization. They can be defined as follows:

Strengths

The team provides expertise and a strong public presence in a sector where information is traditionally inadequate and difficult to access. Experts have experience and skills in gathering and timely analysis of current market information on basic agricultural commodities and the main trends in production and trade. They are traditionally good at economic analysis of the problems in the sector and respond quickly to the most important events and changes in the legislation. According to Nikolay Valkanov, IntelAgro is virtually no alternative to the market in these spheres. According to the evaluators this statement is quite exaggerated considering the activity of other subjects. Perhaps, he meant something specific to IntelAgro. Another important advantage of the team is its ability to provide information in easily accessible form – readable and comprehensible texts, readable graphic information and infographics.

Weaknesses

The organization experiences shortage of expert resources and administrative capacity. The capacity of the leading members is distributed among too many activities, among others "searching the profile of the

organization” and maintaining its activity; website and blog support, tracking and responding to the regulatory framework, preparing analyses, publishing the magazine, organizing events and others, in the agricultural sector, which is wide-ranging.

Finally, there is an insufficient presence of the Foundation in front of the broader (non-specialist) audience and the opportunity for national media to present important topics for the agricultural sector. The organization will gain credit if its relations with the major business associations in the sector are revised and the potential for collaboration and partnership with them is realistically assessed.

The medium-term prospects for InteliAgro’s development can be considered good in terms of gained experience and expansion of its scope taking account, of course, the support of the America for Bulgaria Foundation. Advice on strategic planning and administrative capacity building will also be needed.

Center for Agro-policy Analysis

In its essence the Center is a long-term project implemented within the framework of the Institute of Agricultural Economics. It can also be defined as a “public-private partnership” in the field of research, a hybrid form without a sound basis, regulation, traditions and experience under the circumstances in Bulgarian.

Its strengths are associated with the professionalism and activity of Associate Professor Bojidar Ivanov. Besides, the team gains trust and recognition thanks to the reputation of the hosting Institute. The center has created a unique product that is its greatest asset. The Center is also proud of its independent status in the sense of lack of involvement in private interests through corporate donations. Due to the symbiosis with the Institute of Agricultural Economics, the Center’s team has saved efforts to solve a number of household, administrative and financial issues.

However, considering the circumstances of coexistence, the Center is subordinate to supreme organizations and institutions, and is dependent on the benevolence of their leaders. There is always the risk of mistreatment and sudden changes in policy and responses.

In summary, the medium-term prospects for the Center’s sustainability are favorable. Still, it is necessary the support of America for Bulgaria Foundation to continue in some form.

4. Examples of successful and effective collaboration and partnership between InteliAgro and the Center for Agro-policy Analysis at the Institute of Agricultural Economics. Assessing the potential for symbiosis between the two analytical centers?

The survey found many examples of joint activities within the projects of both organizations. The impression is more of formal collaboration between colleagues in organizing and visiting public events, facilitating individual sessions and the like without real interaction aiming to achieve common goals.

On this point it should be borne in mind that, although unintentionally, the leading figures of the two projects/the two organizations are perceived as competitors for the funding by the America for Bulgaria Foundation. In this sense, they are not too willing to undertake any common activities and move towards closer cooperation. There are also interpersonal difficulties.

Given the different profile and comparative advantages of the two institutions, under the appropriate conditions provided by the America for Bulgaria Foundation, it is possible to propose an option for pooling

the efforts of the two expert teams and seeking complementing activities. As far as it was clarified in the course of the research, such talks between Nikolai Valkanov and Bozhidar Ivanov have already been conducted on future opportunities for cooperation in specific areas. In the opinion of the evaluators, these issues need to be carefully discussed and joint initiatives and projects to be encouraged, even more so that this is the trend in the non-governmental sector in Bulgaria in the current conditions of limited funding and lack of expert resource.

5. Ability to identify competitors, assessment of their capacity and influence in the sector.

The responses to this question by the leaders of the two organizations did not give enough clarity about their assessment of competition and the market environment in which they operate. This includes other research organizations (the Institute for Agrostrategies and Innovations; websites and portals – Agroportal, Fermer.bg, Agro.bg and others; business associations, National Agriculture Forum etc.).

It is generally perceived that the evaluated organizations do not have a sufficient interest in their competitors and do not make efforts to seek and develop their comparative advantages. In addition, IntelliAgro and the Center for Agro-policy Analysis are not affiliated and actively seeking co-operation with other organizations and specialized media. They are not aware of the necessity for expanding the partnerships and projects and it is an imperative of the modern development of the non-profit organizations in Bulgaria. This path of development must necessarily be included in the decision to continue the support by the America for Bulgaria Foundation. Such an approach will reveal additional opportunities for organizational development in terms of new themes, new methodologies, new skills, and more. Of course, such development will require different management skills, excellent discipline and a good organization of work.

Annex 4. Detailed Analyses of the Qualitative Surveys

Quantitative surveys

1. Introduction

In order to estimate the main characteristics of the impact of the IntelliAgro and the Center for Agri-Policy Analysis (CAPA) work on the farmers' access to quality information in Bulgaria, three quantitative surveys were conducted: with farmers, with branch organizations and with representatives of the National Agricultural Advisory Service. A short description of each survey main characteristics could be summarized as follows:

1.4. Quantitative survey with farmers

The survey is based on a random sample of farmers stratified by the *holding size* (medium, large and very large), the *sector* (cereal and oilseeds, dairy and meat, vegetables and fruit) and the *statistical region* (NUTS2) in which the farmers carry out their agricultural activities. The stratification is done proportionally to the number of farmers in each stratum in the population (approx. 35 thousand holdings). The farmers in each stratum are selected using the simple random sampling procedure. The sample size is 250 units and the number of strata is 21.

Because of the survey time period specifics (19.06-25.07.2018), concerning the intensified agricultural activities of the farmers, replacements of the non-respondents (farmers' holdings that refused participation in the survey) were made using holdings with similar characteristics.

The interviewing process was executed by the means of telephone interviews (CATI) using a questionnaire with 14 close-ended questions (incl. 5 multiple answers) and 4 open-ended questions. The total number of successfully completed interviews is 251.

1.5. Quantitative survey with branch organizations

Initially, the survey was designed to be exhaustive and to include all branch organisations that are registered at the Ministry of Agriculture, Food and Forestry (according to the internet site of the MAFF the total number of branch organisations is 71, the last update is done in 2015).

Afterwards, during the survey conduction process, it was found that the branch organizations are mainly commercially oriented ones and that they execute almost no representative functions. Also, it was unveiled that more than a half of the branch organizations (39) have no e-mail address or any detailed contact information which brought additional difficulties to survey conduction and made the communication with those organizations impossible.

Invitation letters to the e-mails of 32 contacted branch organizations were sent. The interviews were conducted by the means of CAWI using the LimeSurvey platform installed on a secured server and a SSL certified domain that guarantees a high level of the confidentiality protection of the respondents' data.

Despite all efforts to stimulate the participation of the organizations in the survey and the multiple reminders by means of e-mails and telephone calls, during the survey period (21.06-27.07.2018 r.) only 7 branch organizations responded to the invitations and completed the survey (National Grain Producers Association, Union of the processors of fruit and vegetables, Bulgarian Association of Grain and Feed

Traders, Association of Meat Processors in Bulgaria, Union of Compound Feed Producers, Union of Rice Producers in Bulgaria, Fishery Producers Association).

The questionnaire includes 15 questions (9 close-ended and 6 open-ended).

1.6. Quantitative survey with representatives of the National Agricultural Advisory Service

The 27 regional offices of the National Agricultural Advisory Service are allocated across the territory of the Republic of Bulgaria and in particular at the administrative centers of the Bulgarian districts.

In order to conduct exhaustive interviews with representatives from all regional offices telephone consultations were organized and the aims of the survey were discussed in details.

Despite the refusals for participation of some of the regional offices and the unit non-responses, 20 survey questionnaires were fully completed (Blagoevgrad, Burgas, Varna, Veliko Tarnovo, Vidin, Vratsa, Gabrovo, Dobrich, Kardzhali, Kyustendil, Montana, Pazardzhik, Pernik, Silistra, Sliven, Stara Zagora, Shumen). At three of the regional offices 2 experts from each office took part in the survey.

The survey is a CAWI based one and it was conducted during the period 09-24.07.2018 using the same LimeSurvey platform that has been used for the online interviews with the branch organizations.

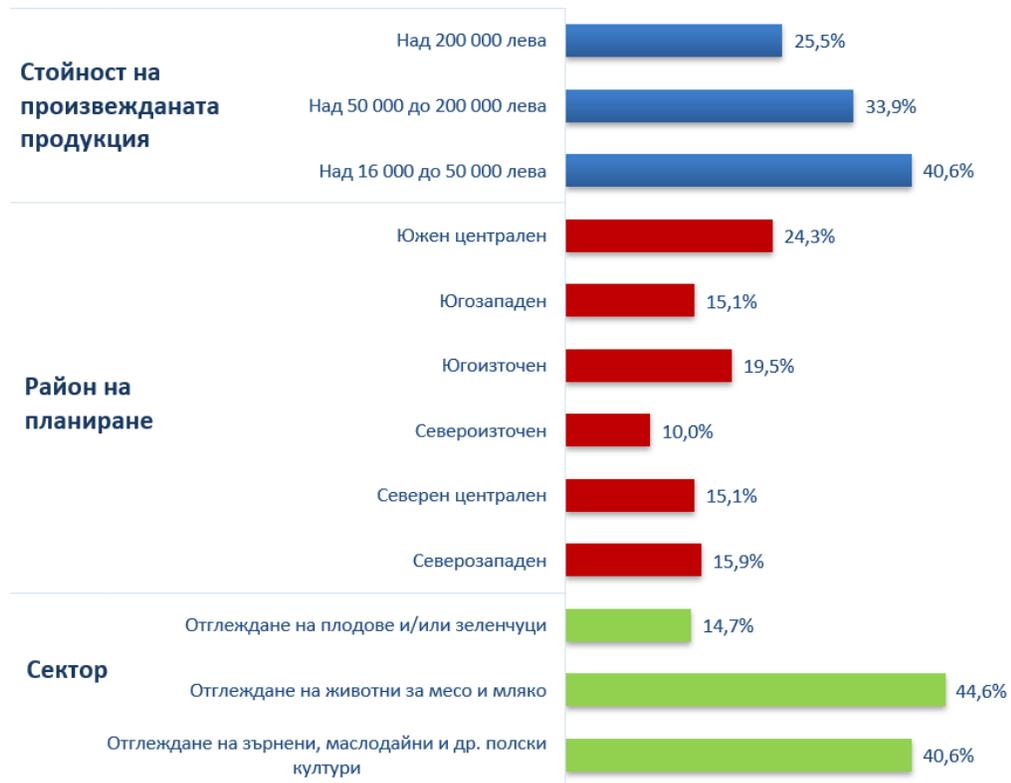
The questionnaire consists of 10 survey questions (6 close-ended and 4 open-ended).

1. Резултати от проведените изследвания

1.1. Количествено изследване с фермери

1.1.1. Профил на респондентите

Въз основа на извършената статистическа обработка на данни са получени следните резултати за разпределението на фермерите по основни характеристики:



Източник: Анкетно проучване (база: 251 респондента)

Фигура 1. Профил на респондентите по основни характеристики (фермерите)

Както става ясно, с най-голям дял сред респондентите са средните по големина стопанства (40,6%), фермерите от южен централен район (24,3%) и тези, отглеждащи животни за месо и мляко (44,6%).

1.1.2. Статистически анализ на резултатите от обработката на данни

Основна цел на количественото изследване с фермери е установяване на степента на въздействие на резултатите от дейността на ИнтелиАгро и Центъра за икономически изследвания в селското стопанство (САРА) върху достъпа на българските фермери до качествена информация. В тази връзка, на фермерите бяха зададени въпроси, както с по-общ (въвеждащ в тематиката) характер - относно източниците на информация, които те използват за осъществяване на своята дейност, така с конкретна насоченост – относно информацията, предоставяна от ИнтелиАгро и САРА.

Въз основа на статистическата обработка на данните от анкетата, могат да бъдат направени следните изводи:

- Малко повече от ¼ от фермерите (78,1%) използват интернет сайтовете като основен източник на информация при организиране и планиране на своята дейност, като 83,2% от тях посещават тези сайтове поне веднъж седмично.



Източник: Анкетно проучване (база: 251 респондента)

Фигура 2. Основни видове информационни източници

Важно място в информационния „поток“ заема информацията, предоставяна от познати, приятели и колеги от бранша (70,1%). Обмяната на ценни вести при половината от запитаните (52,3%) се случва поне веднъж седмично, а при 1/3 (31,8%) и по-рядко - веднъж месечно. Сведенията, получени при участието на респондентите в семинари, обучения и форуми (50,6%), се оказват ценни, макар и тези участия да се случват сравнително по-рядко – при 50,4% от респондентите веднъж на няколко месеца, а при 30,7% веднъж годишно или по-рядко.



Източник: Анкетно проучване

Фигура 3. Честота на използване на основните видове информационни източници

Класирането на 3-те най-разпространени източника на информация при фермерите, от гледна точка сектора на дейност, в който осъществяват дейността си, както и от гледна точка на стойността на произвежданата продукция, остава непроменено.

Известно различие се наблюдава от гледна точка на района на планиране, в който фермерите осъществяват дейността си, въпреки, че промяната в топ 3 на класацията е налице само в третото място: в северния централен район на това място се появява телевизията и аналогично в югозападния район, където третото място се заема от печатните издания.

Като по-малко разпространени сред фермерите са: печатните издания (39,8% от анкетираните), консултантските услуги (32,3%) и телевизионните предавания (29,9%), въпреки че честотата на използване тези източници е сравнително висока (86,0% от използващите печатни издания се осведомяват от тях поне веднъж месечно или по-често). В частта други източници (3,6%) е посочена информацията, осигурявана от брошури, каталози и различни доставчици.

- Когато става дума за това кои конкретни информационни „доставчици“ са най-популярни (най-разпознаваеми) сред фермерите, на първите пет места се „класират“: Държавен фонд „Земеделие“ (96,8% от респондентите), Министерство на земеделието и храните (93,6%), специализираните телевизионни предавания (92,8%), специализираните селскостопански сайтове (92,4%) и Националният статистически институт (86,5%). Центърът за икономически изследвания в селското стопанство (32,3%) и ИнтелиАгро (19,1%) се намират в „дъното“ на класацията.



Източник: Анкетно проучване (база: 251 респондента)

Фигура 4. Познатост на основните информационни източници

Тази класация остава почти непроменена от гледна точка на трите „разреза“ на фермерската извадка – по големина, сектор и местоположение на дейността. Изключение прави появата на специализираните печатни издания на 5-то място при фермерите, отглеждащи животни за мляко и месо, както и при тези осъществяващи дейност в северния централен и югозападния региони. В североизточния регион в топ 5 на източниците се класират и браншовите организации. Най-големите стопанства разчитат на информация и от браншовите организации.

- При класирането на основните източници, използвани при планиране на селскостопанската дейност, на първите 5 места се нареждат: специализирани сайтове за селскостопанска информация (76,1%), Държавен фонд „Земеделие“ (64,5%), Министерство на земеделието и храните (62,9%), специализираните телевизионни предавания (47,8%) и специализирани печатни издания (37,1%). При своето планиране едва 6% от фермерите използват услугите на САРА и 3,6% на ИнтелиАгро.

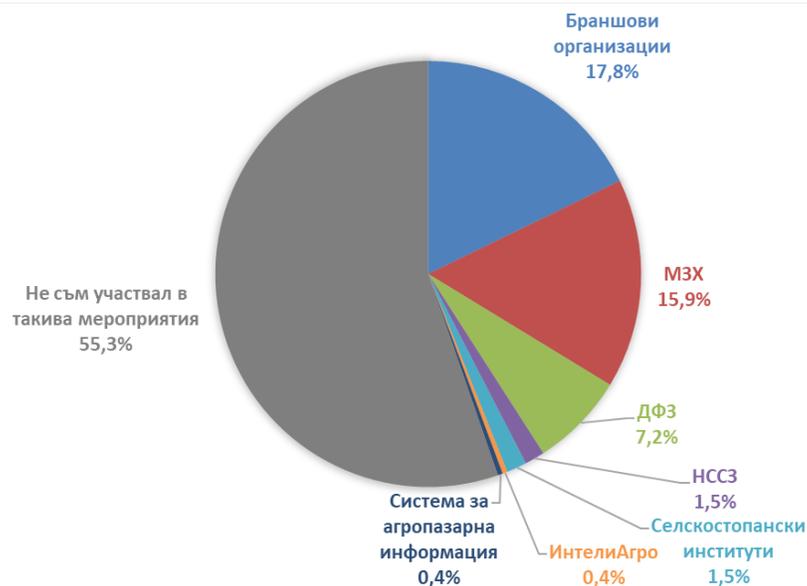


Източник: Анкетно проучване (база: 251 респондента)

Фигура 5. Използвани основни информационни източници

Класацията остава почти без промяна при различните „категории“ респонденти, с изключение на случаите, при които браншовите организации се появяват като част от информационния поток (в северозападен и североизточен район; при фермерите, отглеждащи зърнени, маслодайни и други полски култури; големите и много големите фермерски стопанства). В по-предни позиции в класацията се поместват и НССЗ при фермерите, отглеждащи зеленчуци и плодове и специализираните печатни издания при фермерите със стойност на произвежданата продукция над 200 хил. лв.

- По-голямата част от респондентите (над 60%), които не използват услугите на ИнтелиАгро, но все пак познават организацията (15,5% от всички анкетирани), не могат да дефинират точното ѝ предназначение или свързват организацията с анализи и информация за земеделието.
- Въпреки че над ¼ от респондентите (26,3%) познават САРА, макар и да не са се възползвали пълноценно от услугите ѝ, отново над 60% от тази подсъвкупност не могат да определят с какво точно се занимава тази организация. Тези от тях, които все пак имат представа, определят Центъра за икономически изследвания в селското стопанство, като такъв, който се занимава със съвети, анализи, изследвания и прогнози в селското стопанство и по-конкретно в земеделието.
- Участието на представители на фермерските стопанства в семинари, обучение, конференции и други подобни мероприятия не е особено активно – през последната 1 година 58,2% от респондентите не са участвали в нито едно събитие. Останалите респонденти основно вземат участие в мероприятията на браншовите организации (18,7%), МЗХ (16,7%) и ДФЗ (7,6%). От всички анкетирани има само един участник в мероприятията на ИнтелиАгро.



Фигура 6. Участие в семинари, обучения, конференции и др.

От гледна точка на различните „типове“ фермери няма никаква промяна в класацията на участието в мероприятия на различните организации. От гледна точка на активността прави впечатление, че най-активни участници са фермерите, отглеждащи плодове и/или зеленчуци (51,4%), фермерите от южен централен район (52,5%) и фермерите със стойност на произвежданата продукция между 50 и 200 хил лв. (55,3%).

- От всички фермери, взели участие в количественото изследване, едва 3,6% активно използват информация от ИнтелиАгро, като преобладаващата част от тях (88,8%) се възползват веднъж на няколко месеца или по-рядко от услугите на организацията. Основните услуги, които представляват интерес за тези фермери са информационните (новините от бранша) и обучителните услуги. Използваната информация от ИнтелиАгро при 88,9% от „активните“ потребители оказва сравнително силно влияние върху вземаните от тях решение при организиране на дейността им.
- 6% е делът на фермерите (от всички анкетирани), които се възползват пълноценно от услугите на САРА. Те прибягват до услугите предимно веднъж годишно (46,7% от активните ползватели) или веднъж на няколко месеца (26,7%). Като основна „ценност“ за потребителите представляват: анализите и тенденциите в производството на селскостопанска продукция, както и новините, касаещи бранша. И тук, използваната информация от САРА оказва влияние при вземането на решения от страна на фермерите (93,3% от активните потребители).
- След информирането на незапознатите фермери с дейността на двете организациите, които са обект на настоящото изследване, се оказва, че около 65,0% от тях биха искали да се запознаят по-подробно с услугите им.



Източник: Анкетно проучване (база: 251 респондента)

Фигура 7. Желание за запознаване с услугите на ИнтелиАгро и САРА

Най-голям интерес към допълнителна информация за организациите са проявили фермерите, отглеждащи плодове и/или зеленчуци (73,0%), фермерите от югозападен район (76,3%) и тези със стойност на продукцията между 50 и 200 хил. лв. (70,6%).

1.2. Количествено изследване с представители на браншови организации – анализ на резултатите

Въз основа на събраната чрез онлайн анкета информация, могат да бъдат направени следните изводи:

- Източниците на информация, които са с най-висока степен на познатост при браншовите организации, са: Министерство на земеделието и храните, специализираните телевизионни предавания, специализираните сайтове, браншовите организации, Държавен фонд “Земеделие” и Центъра за икономически изследвания в селското стопанство.
- Най-често използвана, във връзка с осъществяване на дейността на браншовите организации, е информация от: Министерство на земеделието и храните, специализираните селскостопански сайтове, Център за икономически изследвания в селското стопанство, браншовите организации, Държавен фонд “Земеделие” и специализираните телевизионни предавания.
- Информацията от ИнтелиАгро се използва по-скоро веднъж годишно или по-рядко, главно с информационна цел, като респондентите считат тази информация за полезна.

- Услугите на САРА се използват по-често от тези на ИнтелиАгро (веднъж месечно или на няколко месеца веднъж), като основната цел на употребата е получаване на актуална информация, проучване на пазарните тенденции в бранша и търсенето на нови пазари за членовете на браншовата организация. Получаваната информация се определя по-скоро като полезна.
- Основните видове информация, от които се нуждаят браншовите организации, касаят: статистическа информация за дейността в бранша, потреблението на селскостопанската продукция, актуални новини и информация за бранша, прогнози и тенденции за развитието на дейността в бранша и европейски програми и проекти.
- Когато се обръщат за компетентна помощ, членовете на браншовите организации търсят основно: информация за потреблението на селскостопанската продукция, актуални новини и информация за бранша, прогнози и тенденции за развитието на дейността в бранша, статистическа информация за дейността в бранша, европейски програми и проекти.
- Браншовите организации, посочили информация на въпроса за броя на земеделските стопанства според големината им, индикират, че техните членове са по-скоро големи фермерски стопанства.

1.3. Количествено изследване с експерти-представители от Националните служби за съвети в земеделието – анализ на резултатите

Проведеното онлайн изследване сред представители на Националните служби за съвети в земеделието, обрисова следната „картина“ на потреблението на информация:

- Подпомогната познатост на основните източници, предоставящи информация за селскостопанската дейност в България, сочи, че най-популярни (логично) са данните, предоставяни от Националната служба за съвети в земеделието (100% от анкетираните експерти), следвана от Министерство на земеделието и храните (95%), Държавен фонд “Земеделие” (90%), селскостопанските институти (85%) и специализираните сайтове (85%).



Източник: Анкетно проучване (база: 20 респондента)

Фигура 8. Подпомогната познатост на основните източници на информация

Центърът за икономически изследвания в селското стопанство е познат на малко над 1/3 от експертите (35%), а ИнтелиАгро на 10% от тях.

- Когато става дума за използването на основните източници на данни в работата на самите експерти класирането е аналогично:



Източник: Анкетно проучване (база: 20 респондента)

Фигура 9. Използване на основните източници на информация

- Обръщайки внимание към „трансфера“ на информация от експертите на НСССЗ към техните потребители, подредбата е малко по-различна. На първо място е посочено Министерството на земеделието и храните (90% от анкетираните), следвано от: Държавен фонд “Земеделие“ (90%), Национална служба за съвети в земеделието (85%), селскостопанските институти (65%) и специализираните сайтове (45%).



Източник: Анкетно проучване (база: 20 респондента)

Фигура 10. Предоставяне на информация от основните източници на потребителите

Макар и отново на „дъното“ на класацията (с по 10%) ИнтелиАгро и САРА присъстват в информационния „извор“, от които черпят данни представителите на НССЗ.

- Респондентите, които са чували за САРА, но не са ползвали услугите на организацията, не могат да дефинират нейното конкретно предназначение.
- Клиентите, които се обслужват офисите на НССЗ, предимно търсят информация за изготвянето на проекти (90%), финансиране на селскостопанската дейност (85%), организиране на обучения (85%), ползване на директни плащания и държавни помощи (80%) и нормативни актове и проекти на нормативни актове (70%).



Източник: Анкетно проучване (база: 20 респондента)

Фигура 11. Основни типове информация, която търсят потребителите

- Разглеждайки профила на потребителите, които се обръщат към териториалните офиси на НССЗ за помощ, се оказва, че те са предимно земеделските стопанства (100%), но също така и граждани (75%), меди (70%), браншови организации (40%) и чуждестранни лица (15%).
- От гледна точка на големината на фермерските стопанства, типовете информация, която се търси от потребителите, общо взето е сходна и включва най-общо:
 - ▶ възможности за финансиране на селскостопанската дейност;
 - ▶ програми за развитие на селските райони 2014-2020 и мерки, по които могат да кандидатстват фермерите;
 - ▶ изготвяне на проекти;
 - ▶ консултации относно приложението на нормативни актове;
 - ▶ специализирани съвети в конкретните направления – растениевъдство, животновъдство, биоземеделие и други;
 - ▶ схеми за директни плащания;
 - ▶ цени и пазари на земеделска продукция;
 - ▶ организиране на обучения.