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INSTITUTE OF AGRICULTURAL DEVELOPMENT IN CENTRAL AND EASTERN EUROPE

ASSESSMENT OF INFORMATION AND COMMUNICATION NEEDS OF INSTITUTIONS AND STAKEHOLDERS OF THE NATIONAL AGRICULTURAL RESEARCH SYSTEM OF UKRAINE

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Andriy Nedoborovskyy
Jana Fritzsch
Axel Wolz

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Abbreviations and acronyms

AUUAE	All-Ukrainian Union of Agricultural Enterprises
CIDA	Canadian International Development Agency
DFID	Department for International Development, United Kingdom
EU	European Union
FAO	Food and Agriculture Organization of the United Nations
FFCU	The Female Farmers Council of Ukraine
GFA	GFA Consulting Group
IAMO	Institute of Agricultural Development in Central and Eastern Europe
ICT	Information and Communication Technology
IHP	Individual Household Plots
LSE	Large Scale Enterprises
MAPU	Ministry of Agricultural Policy of Ukraine
NAAAS	National Association of Agricultural Advisory Services
NACU	National Agrarian Chamber of Ukraine
NACUU	National Association of Credit Unions of Ukraine
NAUU	National Agricultural University of Ukraine
NUACU	National Union of Agricultural Cooperatives of Ukraine
OFU	Organic Federation of Ukraine
RYU	Rural Youth Union
SIDA	Swedish International Development Cooperation Agency
UAAS	Ukraine Academy of Agricultural Sciences
UAC	Ukrainian Agrarian Confederation
UAFLO	Ukrainian Association of Private Farmers and Landowners
UGA	Ukrainian Grain Association
UkrINTEI	Ukrainian Institute of Scientific-Technical and Economic Information
Ukrsugar	National Association of Sugar Producers of Ukraine
UNDP	United Nation Development Programme
USAID	United State Agency for International Development

Summary

The objective of this study is to identify the information and communication needs of relevant institutions and stakeholders from the national agricultural research system, extension services, NGOs, farmers' associations, representatives from rural men, women and youth, and larger agricultural enterprises. Representatives from the 18 most important national agricultural organizations were interviewed. The major emphasis of the questionnaire was on getting first hand information about the actual state of technical infrastructure among the various organizations, their sources of information and how they provide information to the general public (external communication) and to their own members (internal communication). Similarly, they were asked about their own assessment concerning their information and communication strategies. In addition, enquiries were made about the identification of key players, and the collaboration and networking with other organizations within and outside the agricultural sector.

The organizations interviewed confirmed that ICT is fairly well adopted in Ukraine. But there is clear dichotomy: while offices in Kiev are well equipped, modern technology is scarce in the rural areas. It is generally recognized that there is an urgent need for more and better processed information within the agricultural sector. The major emphasis must be placed on market information systems, access to financial services, information regarding internationally funded projects, and laws and regulations affecting the agricultural sector. It was stressed that the main reason for not being able to fill these information needs was that most organizations had no or limited access to modern electronic technologies, lacked the necessary financial resources, and that their staff had a low level of proficiency in handling modern technologies and a poor level of language skills.

One important positive factor is that there is a relatively high degree of communication and collaboration among the various organizations. A number of board members are also serving on the boards of other organizations which facilitates the informal flow of information. This, however, has to be better structured and formalized in order to be more effective over time.

The spread and application of modern technologies has to be encouraged and supported. This implies not only to the provision of modern hardware, but also to the adequate training of staff in its use. Similarly, skills training for the improvement of ICT requires focus on techniques concerning how to identify relevant information, how to distinguish correct from less reliable sources of information, and how to process information in such a way that it can be easily understood by the respective stakeholders. Specific target groups have to be approached through different types of communication media in order to be effective. Improvement of the staff's foreign language abilities should also be part of the skills development programme.

As the strongest key player of the agricultural sector, the Ministry of Agricultural Policy is urgently required to facilitate and coordinate the flow of information. In addition, the Ukrainian Association of Private Farmers and Landowners, the Ukrainian Agrarian Confederation, the National Agricultural University and the National Association of Agricultural Advisory Services can be seen as viable focal points for collecting and disseminating information. The Ukrainian Institute of Scientific-Technical and Economic Information which is handling a vast reserve of data files has to be strengthened in order to become a viable and acknowledged source of information. Up until now, it has not fulfilled this function. The agricultural organizations are encouraged to adopt appropriate communication channels with the various groups of stakeholders since not all of these organizations can make the best use of the same means.

1. INTRODUCTION

The agricultural sector of Ukraine experienced a rapid decline following independence and only since the late 1990s, has demonstrated a modest improvement. Today, agricultural production is characterized by three different groups of farm entities. On the one hand, there are about 14 000 large-scale farms cultivating, on average, 2 380 ha. On the other hand, there are about 11 million households cultivating small plots of about 0.8 ha each. In between, there are about 43 000 private farmers cultivating about 63.5 ha each. A more detailed overview of the agricultural sector is given in Annex 3.

One contributing factor to this somewhat unsatisfactory situation of the agricultural sector seems to be the fact that the traditional public sector information sources have suffered considerably as a result of the enduring economic difficulties. Ukraine's agricultural information system is still in a state of transition. In addition, new sources of information, such as the Internet, have emerged, generally on a commercial basis. However, these developments are mostly unconnected, lack a conceptual basis, and are not intended to provide the agricultural sector with the required information base in the public domain. A number of preliminary constraints have already been identified. The Government understands the need to develop a proper national agricultural information strategy, based on the requirements of the relevant stakeholders. In order to support the Government in this task the Leibniz Institute of Agricultural Development in Central and Eastern Europe (IAMO) has been assigned by FAO to conduct an in-depth assessment and to provide recommendations, within the framework of project TCP/UKR/3005 "Strategy formulation and capacity building in support of an agricultural information system".

The objective of this study is to identify the information and communication needs of relevant institutions and stakeholders from the national agricultural research system, extension services, NGOs, farmers' associations, representatives from rural men, women and youth, and larger agricultural enterprises. Based on this assessment, recommendations and prioritized needs for different stakeholder groups will be deduced. Specifically, the study aims at accomplishing the following tasks:

- identification of existing sources of agricultural information (including informal farmers' networks, farmers' organizations, etc.);
- assessment of the availability and relevance of local and locally adapted international information, including gender specific data, (in electronic format or hard copy) necessary for the development of improved agricultural research capacity, efficiency and appropriateness in Ukraine;
- compilation of an inventory of existing and preferred tools, channels and actors;
- assessment of the strength, potential and limitations (constraints) of the present information and communication capacities (including human resources, knowledge and infrastructures and relevant communication relationships) and policies and strategies in research and research knowledge transfer (content development, training/education, feedback with society);
- identification of potential partners for the development of solutions, including, where possible, already active and interested donors; and
- undertaking sufficient analysis and acquiring adequate information to facilitate the development of concrete related project proposals for strategies, policies and content development for improved information and communication management by national agriculture research institutions and their partners.

As of December 2005 a draft outline of the questionnaire had been prepared and a list of the relevant organizations of the national research system had been compiled. These together with a draft outline of the study were submitted to FAO for clearance which was obtained in mid-January. Professor Vitaly Zinovchuk from the Agro Ecological University in Zhitomir was identified as a national counterpart. His main task was to provide the necessary up-to-date background information and to coordinate the timing of the interviews. An expert from the IAMO visited the country from 6 to 28 February 2006. In close coordination with the national implementing agency, the Office of the Rector of the National Agricultural University in Kiev, he carried out the structured interviews. A list of the organizations interviewed can be found in Annex 1 of this report and a copy of the questionnaire in Annex 4. The information obtained from these interviews and the literature review was analysed and a draft report presented in mid-March 2006.

2. METHODOLOGY

The questionnaire was drafted in English and then translated into the Ukrainian language. In total, 18 organizations were identified. In addition to the Ministry, representatives from 17 of the most important national agricultural organizations were approached for face-to-face interviews. All the interviewed persons held decision-making positions, either as directors/presidents or, in larger organizations, as department heads or their deputies. Three quarters of the respondents were male, only 4 out of the 18 were female. About one half of the respondents were below 50 years of age, particularly those representing private organizations. The interviews were conducted in their offices.

With respect to the Ministry of Agricultural Policy of Ukraine (MAPU), an exception was made. Since the topic covered various departments within the MAPU it was decided to send the questionnaire to the Ministry and allow it to circulate among the departments involved.

The questionnaire was structured in four parts covering the following areas:

- Section A seeks basic information about the respective organization, such as the type of organization, its main tasks and functions, the importance of different target groups, its decision-making process as well as the actual state of its ICT infrastructure according to the availability, reliability and competence of staff in using it.
- Section B gathers information about the organizational structure in the Ukrainian agricultural sector in order to identify the main stakeholders and their expected contributions.
- Section C focuses on information regarding cooperation and links between the various organizations interviewed, not only within but also outside the agricultural sector.
- Section D explores the sources and channels of information and communication within and outside of the sector. The focus is laid on an inventory of existing and preferred topics, means of communication, ways of identifying relevant sources, their feedback and acceptance as well as the strengths, opportunities and weaknesses of the present ICT capacity.

All interviews were undertaken, personally, in a face-to-face situation. In this way, some aspects could be discussed in more detail while others could be easily clarified in the case of any misunderstanding. In general, an interview lasted between 60 and 90 minutes. The time required for interviews was shorter for the first interviews than for subsequent ones due to a much better understanding of the actual situation, so that some more in-depth questions could be added for clarification. The data was coded and analysed at IAMO. All calculations were undertaken with the software package SPSS; Figure 10 was prepared with UCINET 6.

3. CHARACTERISTICS OF INTERVIEWED ORGANIZATIONS AND INSTITUTIONS

Since independence Ukraine has experienced the re-organization not only of its agricultural production, but also of the organizations which support it. Different types of public and private organizations and associations have emerged. Among other obligations, they had the responsibility to introduce market relations into the agricultural sector, to create a favourable environment for enterprise development, and to protect the interests of their members. These years were a period for the accumulation of partnership experience between the State and these public and private organizations. Some of these organizations were rather short-lived. It can be assumed that the organizations interviewed have passed the formation stage and now possess a high degree of organizational competence.

Beside the Ministry of Agricultural Policy (MAPU), 17 agricultural organizations were interviewed. In Annex 2 a brief overview and introduction to the various organizations interviewed is given. This information is based on the findings of the interviews as well as on the presentations in their Web sites if available. Of these 17 organizations, one had been established prior to the socialist period (i.e. NAUU), three had been established during the socialist period (i.e. UAAS, UkrINTEI, Radio "Kolos"), another two had been transformed from former socialist organizations after independence (i.e. AUUAE, Ukrsugar), while the remaining eleven organizations were newly established after 1992 (i.e. UAFLO, UAC, NACU, NUACU, OFU, NAAAS, NACUU, UGA, FFCU, RYU, Magazine "Proposytsija"). Very broadly, all these organizations can be divided into three major groups: (a) the state organizations, which comprise besides the Ministry the most relevant agricultural scientific organizations; (b) the agricultural non-profit, membership oriented organizations and (c) the agricultural media. The second group is by far the most dominant one, as shown in Table 1:

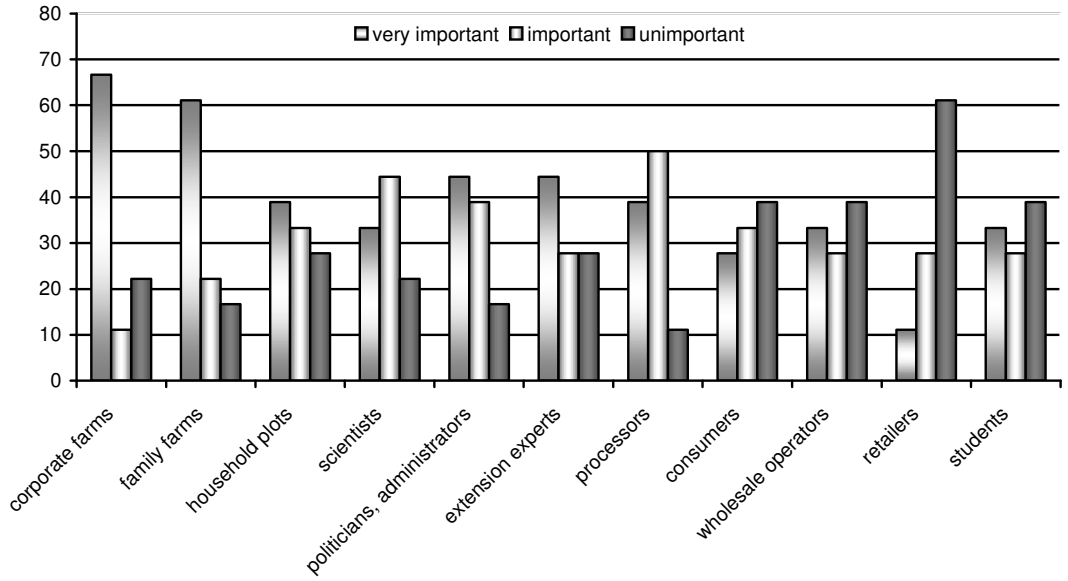
Table 1: Type of surveyed organizations

Type of organization	Reference number	Number of organizations
State organizations	S1, S2, S3, S4	4
Private non-profit organizations	P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12	12
Agricultural media	M1, M2	2
Total		**18**

Source: IAMO Survey, 2006, point A3 of questionnaire.

In general, the organizations interviewed focus particularly on corporate and family farms, followed by extension experts, politicians, processors, and household plots as shown in Figure 1 overleaf. However, retailers, wholesalers, but also consumers and students are not really represented by these organizations.

Figure 1: Relative importance of different target groups for agricultural organizations (%, N=18)



Source: IAMO Survey, 2006, point A7 of questionnaire.

As expected, the organizations interviewed represent and focus in general on different target groups and this is summarized in Table 2 below.

Table 2: Importance of different target groups among surveyed organizations

Target groups *	1a	1b	1c	2	3	4	5	6	7	8	9
MAPU	3	3	2	2	3	2	2	1	1	1	1
UkrINTEI	1	1	1	3	2	1	2	1	1	1	1
UAAS	3	3	3	3	3	3	3	1	1	1	2
NAUU	3	3	2	3	3	3	2	2	2	2	3
UAC	3	2	1	2	3	1	3	2	2	1	2
NACU	3	3	3	3	3	3	3	3	3	3	3
AUUAE	3	1	1	2	2	2	2	2	3	1	1
UAFLO	2	3	3	2	2	2	2	2	2	2	2
NUACU	3	3	3	2	2	3	1	1	1	1	2
NACUU	1	2	3	1	2	2	2	3	1	2	1
NAAAS	2	3	3	2	2	3	2	2	2	2	3
OFU	3	3	3	3	3	3	3	3	3	3	3
UGA	3	2	2	2	3	3	2	2	3	1	2
Ukrsugar	3	2	2	1	1	1	3	3	3	1	1
RYU	1	1	1	1	1	1	1	1	1	1	3
FFCU	1	3	2	1	1	1	3	1	1	1	1
Magazine “Proposytsija”	3	3	1	3	3	3	3	1	3	1	3
Radio “Kolos”	3	3	2	2	2	2	2	3	2	2	1
Average level	**3**	**3**	**2**	**2**	**2**	**2**	**2**	**2**	**2**	**1**	**2**

Remarks: 1: unimportant, 2: important, 3: very important
* 1a: corporate farms, 1b: family farms, 1c: household plots, 2: scientists, 3: politicians, administrators, 4: extension experts, 5: processors, 6: consumers, 7: wholesale operators, 8: retailers, 9: students
Average levels refer to the median.

Source: IAMO Survey, 2006, point A7 of questionnaire.

Some organizations, like NACU or OFU do not focus on any specific group, but try to deal with all of them. Alternatively, some organizations focus on one specific group only, like UkrINTEI on scientists and RYU on (rural) youth including students. Another four

organizations are also highly specialized, focusing on just two target groups each, e.g. FFCU on family farmers and processors, UAFLO on family farmers and households cultivating small plots, NACUU on households cultivating small plots and consumers, and AUUAE on corporate farms and wholesalers.

4. COMMUNICATION MEANS AND INFORMATION NEEDS

The major emphasis of the questionnaire has been placed on obtaining first hand information regarding the actual state of technical infrastructure among the various organizations, their sources of information and how they provide information to the general public (external communication) and to their own members (internal communication). Finally, they were requested to give their own assessment of their information and communication strategies.

4.1 Technical infrastructure

First the actual state of ICT was explored. A survey was made of the availability of ICT infrastructure, the reliability of the various types of technical equipment and the competence of the staff in using it. The answers are summarized in Table 3.

Table 3: Availability, reliability and competence of staff in using ICT infrastructure (%), N=18

	Tele-phone	Fax	Copy machine	Computer	Printer	Intranet	Internet
Availability							
- not available	0.0	0.0	16.7	11.1	16.7	61.1	5.6
- insufficient	22.2	38.9	22.2	33.3	22.2	11.1	50.0
- sufficient	77.8	61,1	61.1	55.6	61.1	27.8	44.4
Reliability							
- unreliable	0.0	0.0	6.7	0.0	0.0	14.3	16.7
- mostly unreliable	11.1	11.1	6.7	25.0	21.4	14.3	29.4
- reliable	66.7	66.7	66.7	56.3	57.1	42.9	41.2
- very reliable	22.2	22.2	20.0	18.8	21.4	28.6	11.8
Competence							
- nonexistent	0.0	0.0	0.0	0.0	0.0	0.0	0.0
- somewhat	0.0	0.0	0.0	6.3	7.1	28.6	23.5
- skilled	50.0	50.0	80.0	81.3	78.6	57.1	64.7
- professional	50.0	50.0	20.0	12.5	14.3	14.3	11.8

Source: IAMO Survey, 2006, point A19 of questionnaire.

In general, the organizations are well equipped with the various types of communication means. The only exception is the availability of an intranet service which is still in its infancy. Less than 30 percent of all organizations use it at present. Some organizations which run small offices in Kiev do not see a need for it for the time being. However, the availability of modern techniques is still insufficient, particularly with respect to computers and printers as well as the use of the Internet. Particularly, those organizations which run regional or district offices emphasize that the rural offices are not well equipped. Most of the available ICT is working reliably. In addition, with regard to modern technologies, these are seen as unreliable, particularly the Internet, intranet, computers in general and printers. This is reflected by the statements that staff feel less professional in their use of Internet and intranet.

When looking at the individual organization, the picture is different. A large number of the organizations are not very well equipped (Table 4). Radio “Kolos”, RYU, OFU and UkrINTEI, in particular complained about the limited availability of hardware. But also the representatives of UGA, UAC, FFCU and UAAS assessed their situation with respect to hardware as rather bleak.

Table 4: Assessment of availability of hardware among surveyed organizations

	Tele-phone	Fax	Copy machine	Computer	Printer	Intranet	Internet	Average level
MAPU	2	2	2	2	2	2	2	2
UkrINTEI	1	1	1	1	1	1	1	1
UAAS	2	1	2	1	2	0	1	1
NAUU	2	2	2	2	2	2	2	2
UAC	2	1	1	0	0	0	1	1
NACU	2	2	2	2	2	2	2	2
AUUAE	2	2	2	2	2	0	2	2
UAFLO	2	2	2	2	2	1	1	2
NUACU	2	2	2	2	0	0	2	2
NACUU	2	2	2	2	2	2	1	2
NAAAS	2	2	2	2	2	0	2	2
OFU	1	1	0	1	1	0	1	1
UGA	2	1	1	1	1	0	1	1
Ukrsugar	2	2	2	2	2	2	2	2
RYU	1	1	0	1	1	0	1	1
FFCU	2	2	1	1	2	0	1	1
Magazine “Proposytsija”	2	2	2	2	2	0	2	2
Radio “Kolos”	1	1	0	0	0	0	0	0
Average level	2	2	2	2	2	0	1	2

Remarks: 0: not available, 1: insufficient availability, 2: sufficient availability (every employee who needs access has it.) Average levels refer to the median.
Source: IAMO Survey, 2006, point A19 of the questionnaire.

If the respective hardware is available, it is working, on average, reliably (Table 5). Only representatives of RYU, UkrINTEI and FFCU complained about the low reliability of their hardware. All these three organizations belong to the group which assessed the availability of modern hardware as insufficient.

Table 5: Assessment of reliability of hardware among surveyed organizations

	Tele-phone	Fax	Copy machine	Computer	Printer	Intranet	Internet	Average level
MAPU	3	3	3	3		3	3	3
UkrINTEI	2	2	2	2	2	2	2	2
UAAS	3	3	3	3	3		1	3
NAUU	3	3	3	3	3	3	3	3
UAC	3	3	3				3	3
NACU	4	4	4	4	4	4	4	4
AUUAE	3	3	3	3	3		1	3
UAFLO	3	3	3	3	2	1	1	3
NUACU	4	4	3	2			3	3
NACUU	4	4	4	4	4	4	2	4
NAAAS	3	3	3	3	3		3	3
OFU	3	3		3	3		2	3
UGA	3	3	3	3	3		3	3
Ukrsugar	3	3	3	3	3	3	3	3
RYU	2	2		2	2		2	2
FFCU	3	3	1	2	3		2	2.5
Magazine “Proposytsija”	4	4	4	4	4		4	4
Radio “Kolos”	3	3						3
Average level	3	3	3	3	3	3	3	3

Remarks: 1: unreliable, 2: mostly unreliable, 3: reliable, 4: very reliable. Average levels refer to the median. Empty cells indicate that the respective communication means are not available.
Source: IAMO Survey, 2006, point A19 of questionnaire.

In general, the staff is regarded as competent in using the available hardware (Table 6). The staff is more professional in using more traditional hardware, i.e. telephone and faxes. Staff members are skilled in the use of copying machines, computers and printers. Only in relation to the use of the Internet, some organizations, i.e. UAAS, UAFLO, NACUU, and FFCU complained about the low level of knowledge and skills in using it quickly and professionally. The number of organizations using intranet is too small to be able to draw viable conclusions. Only UAFLO and MAPU mentioned low level skills among staff for several hardware items. In contrast, some organizations, i.e. NUACU, UGA and Ukrsugar assessed the skills of their staff members as highly professional.

Table 6: Assessment of staff's competence in the use of ICT among surveyed organizations

	Tele-phone	Fax	Copy machine	Computer	Printer	Intranet	Internet	Average level
MAPU	2	2	2	1		1	2	2
UkrINTEI	3	3	2	2	2	2	2	2
UAAS	3	3	2	2	2		1	2
NAUU	2	2	2	3	2	2	2	2
UAC	3	3	2				2	2.5
NACU	3	3	2	2	2	2	2	2
AUUAE	2	2	2	2	2		2	2
UAFLO	1	2	2	2	1	1	1	2
NUACU	3	3	3	3			3	3
NACUU	2	2	2	2	2	2	1	2
NAAAS	3	3	3	2	2		2	2.5
OFU	2	2		2	2		2	2
UGA	3	3	2	2	3		3	3
Ukrsugar	3	3	3	2	3	3	2	3
RYU	2	2		2	2		2	2
FFCU	2	2	2	2	2		1	2
Magazine "Proposytsija"	2	2	2	2	2		2	2
Radio "Kolos"	3	3						3
Average level	2.5	2.5	2	2	2	2	2	2

Remarks: 0: nonexistent, 1: somewhat, 2: skilled, 3: professional. Average levels refer to the median. Empty cells indicate that the communication mean is not available.
Source: IAMO Survey, 2006, point A19 of questionnaire.

4.2 Major sources of information

At the beginning of the interviews regarding ICT, respondents were asked about their sources of information from an unstructured list of 22 different options. First they were asked whether they used that respective source for information at all. If they answered "yes", there was a further enquiry as to whether they used that type either from national sources only, or from international sources only, or from both. It can be assumed that if the respective organization relies on international sources, it has better access to innovations. In addition, the organizations should assess whether that respective source of information had been of high importance and whether it had been ascribed a high level of quality. The results are summarized in Table 7 and Figure 2 to Figure 4 below.

In order to facilitate the interpretation of the results, the sources of information have been arranged in three groups: (a) general sources of information (numbers 1 to 4 in Table 7), (b) traditional professional sources of information (numbers 5 to 17) and (c) modern electronic sources of information (numbers 18 to 22).

Table 7: Relevant sources of information among surveyed organizations

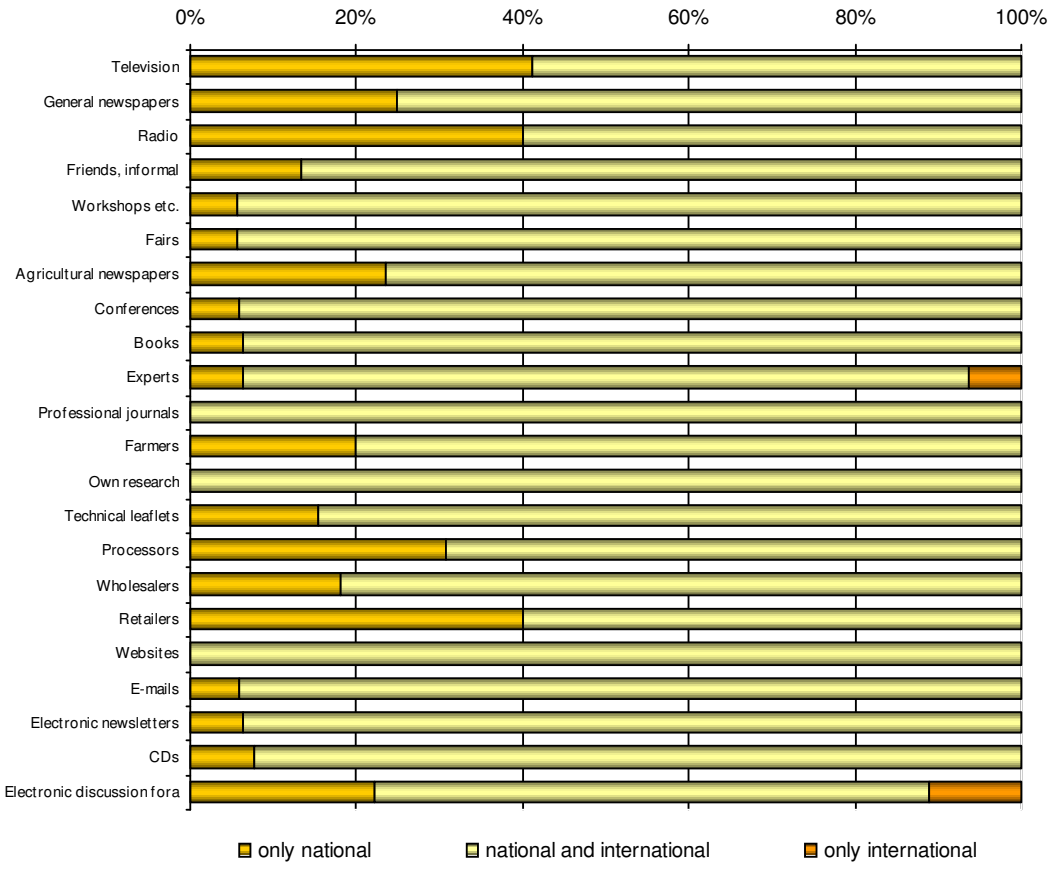
		Reference number	Number of organizations
1	Television	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
2	General newspapers	S1, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	17
3	Radio	S2, S3, S4, P2, P3, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	15
4	Friends, informal	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12	16
5	Training courses, workshops	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
6	Fairs	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
7	Agricultural newspapers	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
8	Conferences	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P11, P12, M1, M2	17
9	Books	S2, S3, S4, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	16
10	Experts	S1, S2, S3, S4, P1, P2, P3, P4, P5, P7, P8, P9, P11, P12, M1, M2	16
11	Professional journals	S1, S2, S3, S4, P2, P3, P4, P5, P7, P8, P9, P10, P11, P12, M1, M2	16
12	Farmers	S1, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P11, P12, M1, M2	16
13	Own research	S1, S2, S3, S4, P1, P2, P3, P4, P7, P8, P9, P11, M1, M2	14
14	Technical leaflets	S1, S3, S4, P1, P2, P3, P4, P6, P7, P8, P9, P10, P11, P12	14
15	Processors	S1, S3, S4, P1, P2, P3, P4, P7, P8, P9, P10, P11, P12, M1	14
16	Wholesalers	S1, S4, P2, P3, P4, P7, P8, P9, P10, P11, P12, M1	12
17	Retailers	S1, S4, P2, P4, P6, P7, P8, P9, P11, P12, M1	11
18	Web sites	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
19	E-mails	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1	17
20	Electronic newsletters	S1, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	17
21	CDs	S2, S4, P2, P4, P5, P6, P7, P8, P9, P10, P11, P12, M2	13
22	Electronic discussion fora	S4, P2, P4, P6, P7, P9, P12, M1, M2	9

Source: IAMO Survey, 2006, point D1 of questionnaire.

All types of sources of information are of high relevance. In this respect, the sources are well balanced. All of them rely on television, training courses, fairs, agricultural newspapers and Web sites. Almost all organizations also rely on general newspapers and conferences, but also on e-mail and electronic newsletters. Conversely, electronic discussion fora, retailers and wholesalers are not very popular as sources for information. At the organizational level, just four organizations make use of all sources for information listed, i.e. S4 (NAUU), P2 (NACU), P7 (NAAAS) and P9 (UGA). Similarly, P4 (UAFLO), P8 (OFU), P11 (RYU) and P12 (FFCU) made use of all sources except one (i.e. radio, electronic discussion fora and

own research, respectively). On the other hand, the lowest number of sources for information are used by S2 (UkrINTEI) with 14 and P1 (UAC) with 15 items, respectively.

Figure 2: Origin of information sources (% of respondents)

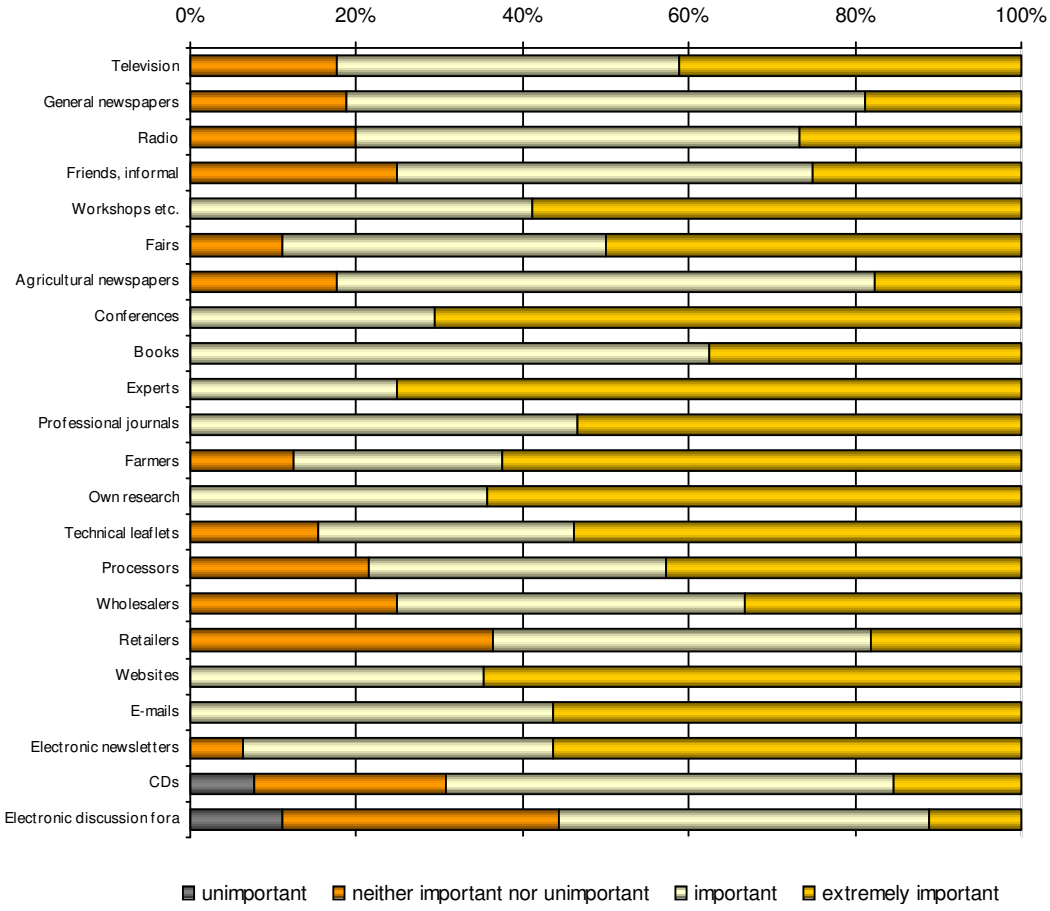


Source: IAMO Survey, 2006, point D1 of questionnaire.

The organizations rely on both national and international sources of information (Figure 2). With respect to the general sources of information, national sources are somewhat more important compared to traditional professional and modern electronic ones. But among the traditional professional sources of information, some of them do not lose their significance, like processors, retailers and agricultural newspapers. International influence is strongest when it comes to modern electronic media, but also with respect to professional journals, research, books, conferences, workshops, fairs and experts.

The opinion regarding the importance of the respective sources of information varies to some extent (Figure 3). On average, the general sources of information are not valued that highly compared to the other two groups. The traditional professional sources do not lose their attractiveness. Besides attendance at workshops and visits to fairs, the organizations see the participation in conferences, the follow up of professional journals and books, but also the personal exchange of views with experts and farmers as well as the execution of research within the organization as very relevant. The importance of using modern electronic technologies is fully understood, particularly e-mail, Web sites and electronic newsletters. The use of CDs and electronic discussion fora are not valued very highly.

Figure 3: Importance of information sources (% of respondents)



Remarks: The category "very unimportant" was not mentioned by the respondents and therefore omitted in the figure.
Source: IAMO Survey, 2006, point D1 of questionnaire.

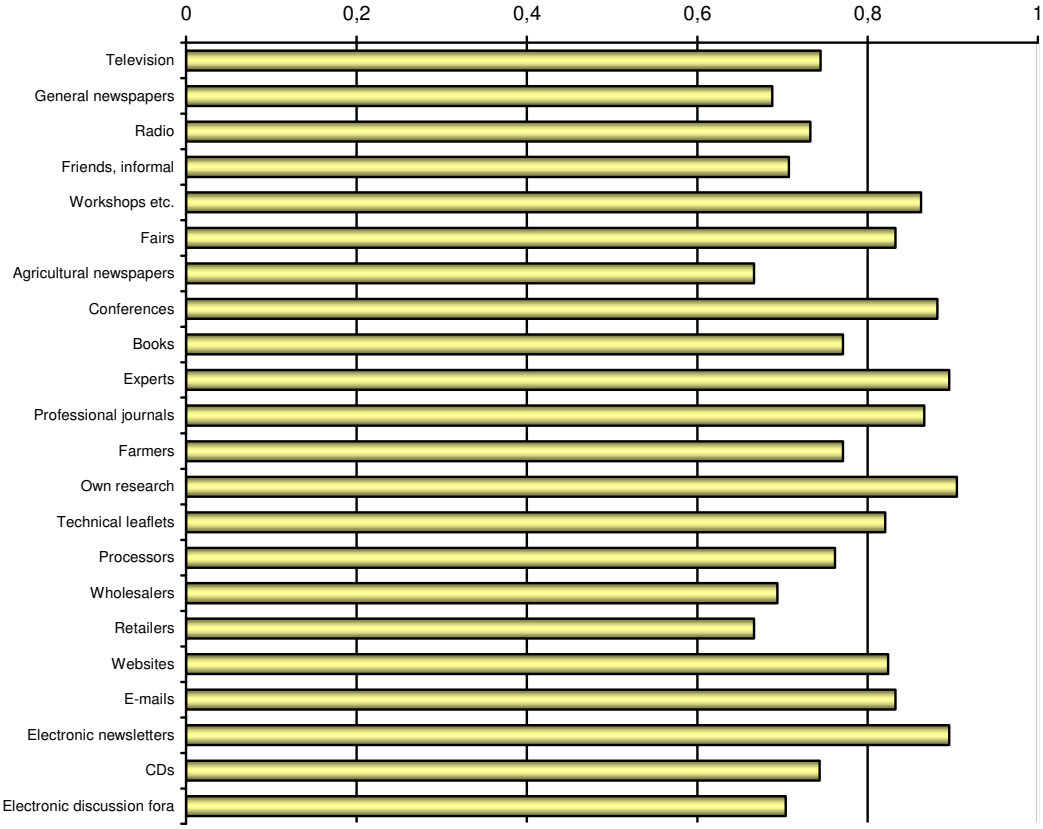
The interviewed organizations were asked to rank subjectively the quality of information sources employed. The answers were used to calculate an index over all organizations ranging up to 1 (all organizations assessed the respective source of high quality). The index is the ratio between the sum of answers weighted by the ranks (1=low, 2=medium, 3=high) and the possible maximum score (3*number of organizations using the source).

On average, the quality of the general sources of information is valued rather low, while that of modern electronic sources of information is valued relatively high (Figure 4). With respect to the group of traditional professional sources of information the picture is split. While the quality of workshops, fairs, conferences, experts, professional journals and own research is seen as very good, the judgement is not so good for retailers, wholesalers and agricultural newspapers.

The findings show that modern electronic media are firmly adopted among the organizations at their headquarters in Kiev. The use of Web sites, e-mail, electronic newsletters and CDs are almost standard these days. Only with respect to participation in electronic discussion fora is its use less popular and those who use it do not value it as important or of high quality. While the technical standards in Kiev are quite high, they are rather low in the regional or even

district offices. Most of these offices suffer from an absence of modern means of communication. Their standard equipment is made up of a telephone and, sometimes, a fax machine. As discussed below, a lack of financial resources and technical inadequacies limit its use.

Figure 4: Quality index of information sources as rated by survey respondents



Source: IAMO Survey, 2006, point D1 of questionnaire.

4.3 Communication means and information needs

The interviewed organizations provide information about their own activities at two levels:

(1) They use external communication channels to approach other agricultural organizations, political institutions and the public in general, and
(2) They use internal communication channels to approach their own members.

The organizations use a whole variety of means of communication for promoting and publicizing their own activities and information. In addition, the respondents were asked who the main recipients were, whether there are any costs involved for the recipients and how they evaluate the acceptance of that specific means of communication by the respective recipients. The main findings are summarized in Table 8 and Figure 5 below.

Similar to the sources of information discussed above, the communication means for providing information have been separated into three groups: (a) general means (numbers 1 to 6 in Table 8), (b) traditional professional means (numbers 7 to 13) and (c) modern electronic means (numbers 14 to 18).

Table 8: Communication means for external communication among surveyed organizations

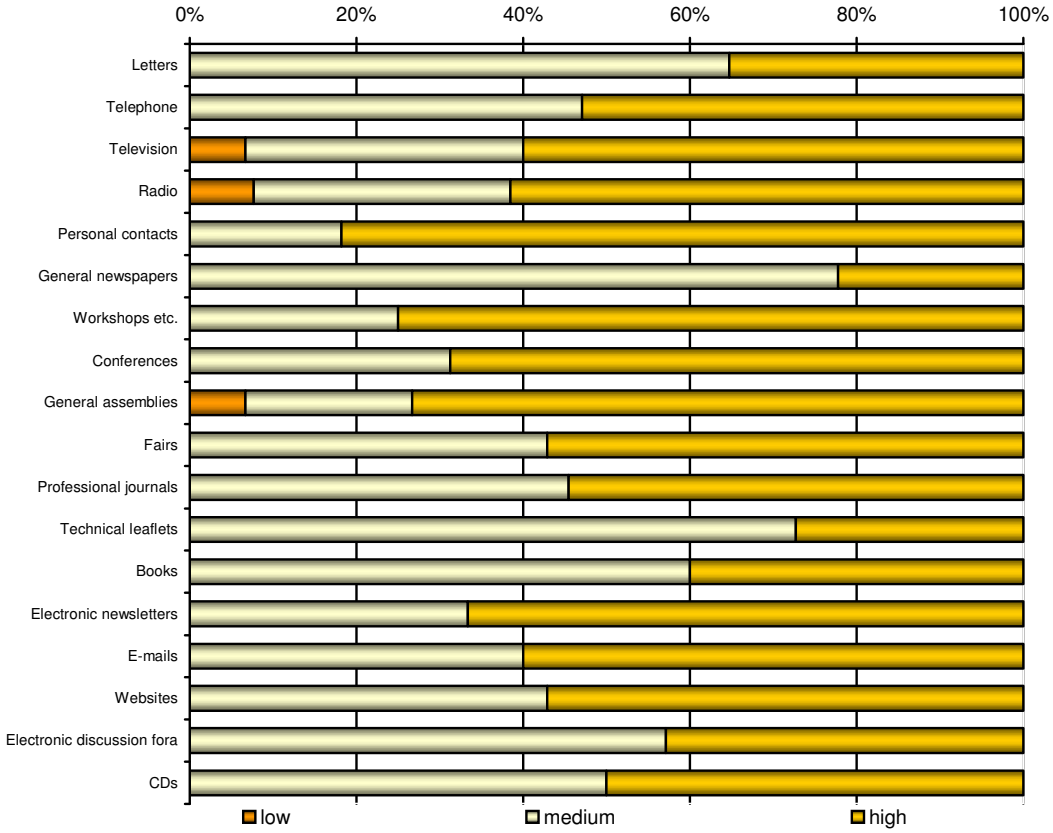
	Type of source	Reference number	Number of organizations
1	Letters	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
2	Telephone	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
3	Television	S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1	15
4	Radio	S3, S4, P2, P3, P5, P6, P7, P8, P9, P10, P12, M1, M2	13
5	Personal contacts	S1, S3, P2, P3, P4, P5, P6, P8, P10, P11, P12, M1	12
6	General newspapers	S3, S4, P1, P3, P5, P7, P8, P10, P12	9
7	Training courses, workshops	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1	17
8	Conferences	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1	17
9	General assemblies	S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1	15
10	Fairs	S1, S2, S3, S4, P2, P3, P4, P6, P7, P9, P10, P11, P12, M1, M2	15
11	Professional journals	S2, S3, S4, P3, P6, P7, P8, P9, P10, P12, M1	11
12	Technical leaflets	S2, S3, S4, P2, P3, P4, P6, P7, P10, P11, P12	11
13	Books	S3, S4, P2, P4, P7, P8, P9, P10, P12, M1	10
14	Electronic newsletters	S1, S2, S3, S4, P1, P2, P3, P4, P6, P7, P8, P9, P10, P11, P12, M1	16
15	E-mails	S1, S2, S3, S4, P1, P2, P3, P4, P6, P7, P8, P9, P10, P11, P12, M1	16
16	Web sites	S1, S2, S3, S4, P1, P2, P4, P5, P6, P7, P9, P10, P11, P12, M1	15
17	Electronic discussion fora	S4, P2, P6, P7, P9, P11, M1	7
18	CDs	S4, P2, P3, P6, P7, P10	6

Source: IAMO Survey, 2006, point D3 of questionnaire.

Again, organizations make use of a whole variety of communication means, particularly written correspondence, telephone and television, among the general means of communication, and training courses, conferences, general assemblies and fairs, among the traditional professional ones, and electronic newsletters, e-mail and Web sites among the modern electronic ones. With respect to the individual organization the situation is not homogeneous. There are none which make use of all types of sources in approaching external players. Three organizations, i.e. S4 (NAUU), P7 (NAAAS) and P10 (Ukrsugar) use all communication means except one, i.e. personal contacts (S4 and P7) and electronic discussion fora, respectively. In contrast, one organization, i.e. M2 (radio “Kolos”) only makes use of four sources, out of the 18 given. Moreover, S1 (MAPU) adopts nine communication means and another three organizations, i.e. S2 (UkrINTEI), P1 (UAC) and P5 (NUACU) use ten different types of sources for external communication.

In a next step, respondents were asked how the (intended) recipients accepted the respective communication means. In general, they evaluated the acceptance of these communication means in transmitting information and messages differently (Figure 5). Personal contacts are regarded as being the most acceptable communication means among the (intended) recipients followed by workshops, general assemblies and conferences, i.e. all these means comprise a personal face-to-face component. The respondents admit that the acceptance rate among the recipients is not that high with respect to modern electronic means, if this is not combined with personal approaches.

Figure 5: Acceptance of communication means (% of respondents)



Source: IAMO Survey, 2006, point D3 of questionnaire.

Subsequently, it was asked whether the organizations used specific communication means for specific target groups. The findings show that there is hardly any differentiation in the means of communication with respect to any specific target group. In the questionnaire nine different groups were given. It should be kept in mind that the various organizations do not focus on all target groups equally. The most important target groups are agricultural producers, politicians, scientists and students, and extension experts. The general situation is as follows. The most frequently used communications means with agricultural producers are television and conferences (used by 14 organizations), written correspondence, telephone, workshops, and fairs (used by 13 organizations) and radio (used by 12 organizations), respectively. CDs and electronic discussion fora are unimportant mainly due to a lack of technical equipment and the low quality. For communication with politicians, organizations prefer to use the telephone and conferences (both by 16 organizations) as well as written correspondence (15 organizations) and television (14 organizations). The first three means require some kind of personal contact with the partner person and show how important such contacts are for policy advice in the Ukraine. Scientists and students get their information from the organizations mainly through

television broadcasts and telephone (14 organizations) and radio (13 organizations). It is doubtful whether these channels are the most appropriate ones in order to communicate information to scientists and students. Professional journals as an accepted source of reliable information are only used by 8 organizations. Conferences, workshops and fairs are used by 9 to 13 organizations in order to make contact with scientists and students. An accumulation of inappropriate communication channels can also be observed with respect to extension experts. The most frequently mentioned communication means are television broadcasts (15 organizations) but also the radio (13 organizations) and this is not an appropriate channel to use in order to communicate information to extension experts but their respective acceptance rate is just at a medium scale.

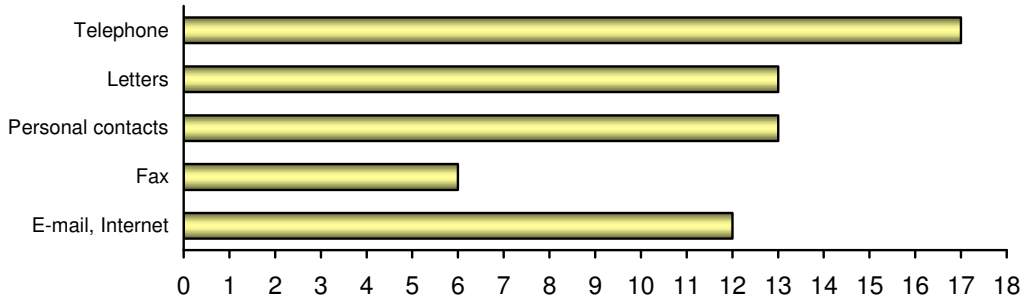
In general, the provision of information regardless of the means of communication is free of charge for the recipients. On average, about two thirds of the costs of all communication means adopted are covered by their own budgets. It is assumed that members are contributing their share due to their membership fees. In about one sixth of the cases, members do not have to pay, but non-members do. This particularly applies to the distribution of leaflets, the use of Web sites or the attendance at fairs and workshops. In another sixth of cases, members pay the same price as non-members, particularly with respect to books and journals. A policy of split prices, i.e. members pay less than non-members, is almost never applied. With respect to the various organizations, they follow a highly differentiated policy. Some organizations do not charge any fees at all from members and non-members alike, i.e. NAAAS, OFU, NACU, UGA, UAC, RYU and Ukrsugar. On the other hand, three organizations, i.e. FFCU, the magazine “Proposytsija” and NAUU charge members and non-members the same level of fees for all types of communication means used. One organization, i.e. AUUAE approaches members only and they do not have to pay any extra fees. Only two organizations adopt a policy of split prices for some of the communication means adopted: with respect to UAFLO the provision of information is free of charge for members but non-members have to pay if they want to attend general assemblies, conferences and workshops. Similarly, non-members have to pay a fee to NACUU while members do not if they want to attend a workshop or receive its CDs. With respect to MAPU, no information was given.

The respondents confirmed that not all organizations focus on all target groups. In order to link the stakeholders in the agricultural sector of Ukraine, it would appear necessary to identify those organizations that communicate with all target groups and use a broad variety of communication means. According to the survey five organizations fulfil these requirements. NAAAS has the widest target range followed by OFU, the magazine “Proposytsija”, NACU, and AUUAE. However, a magazine cannot be regarded as a linking organization and OFU only covers a very specialized part of agriculture and therefore does not represent the whole sector. Therefore, NAAAS, NACU, and AUUAE could be identified as possible linking organizations. This finding has to be seen in close connection with the statements regarding the collaboration with other organizations in the agricultural sector that will be discussed in Chapter 5.

More specifically, questions were asked about the internal means of communication, i.e. exchange of information between management boards and their own members. In an open question respondents were asked about the type of communications they were using in obtaining feedback from their members. They could identify up to five different types. As shown in Figure 6, they made use of the telephone (94 percent), written correspondence and personal contacts, such as talks and discussions at meetings, conferences and workshops (76 percent respectively). It is evident that organizations prefer to obtain feedback in a conventional way. Nevertheless, modern electronic communication means are becoming more popular. About two thirds of them use e-mail and Web sites while the use of fax messages is not very widespread. The information gathered is primarily used for streamlining the decision-making process, coordinating activities, assessing the quality of provided services

and options for their improvement, obtaining general data and information for statistical reasons.

Figure 6: Communication means for collecting feedback among members (N=18)

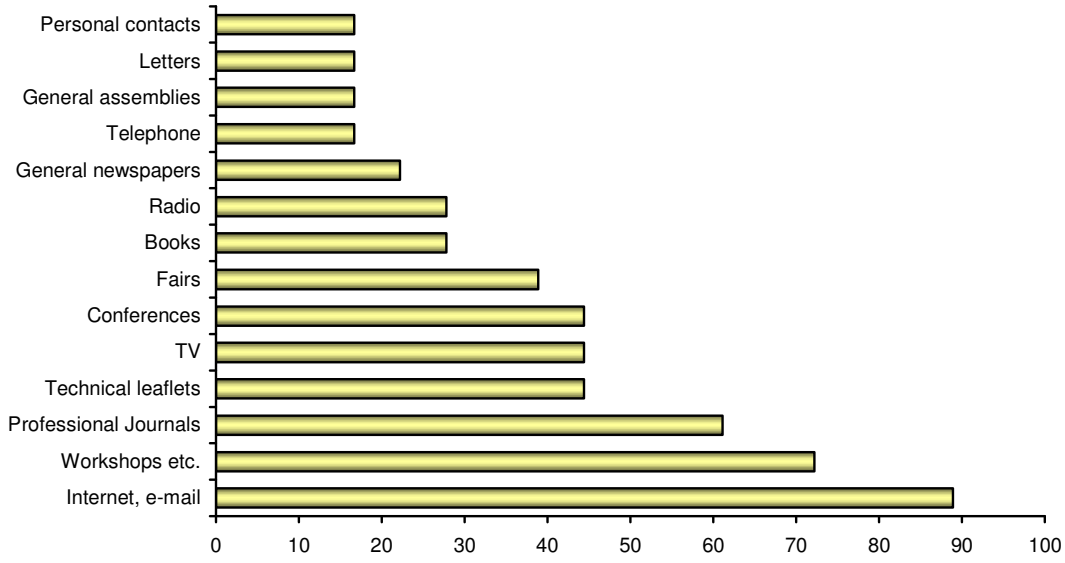


Source: IAMO Survey, 2006, point D4 of questionnaire.

Asked about the reasons why the use of modern electronic means of communications is not so popular among their members, respondents referred to two major points. On the one hand, many members do not have technical skills in handling modern equipment and, on the other hand, at present many members lack the financial means to invest in new technologies. Therefore, respondents saw a great need for improving their means of communication with particular reference to the use of modern electronic technologies. Almost 90 percent of respondents mentioned this fact. However, respondents also saw much scope for improving their traditional professional communication means, such as the organization of workshops and training courses and the standards of professional journals. In Figure 7 the answers are summarized.

Respondents regretted that they could not make better use of modern electronic technologies. More than three quarters saw a great opportunity for improving their services and streamlining the decision-making process if they were able to rely on video-conferences, better access to internet services, internet fora and intranet.

Figure 7: Communication means to be improved (%)



Source: IAMO Survey, 2006, point D5 of questionnaire.

Information needs about the agricultural sector

More specifically, organizations were asked whether they require more detailed information about the agricultural sector. Almost all organizations (about 94 percent) stressed this fact, except NACUU. The organizations were asked in which specific fields they saw the major information needs, what had been the major reason for that observed information gap, what organization would be best equipped to fill that gap and through which type of communication means this information should be provided. In an open question, respondents had the option to mention up to five different types of information gaps, but in general they mentioned up to three different ones. Four major gaps of information were identified:

- market information systems: lack of statistical information, both nationally and internationally about markets, prices and market organizations;
- information regarding financial services regarding access to credits, particularly subsidized ones;
- information on planned and ongoing projects financed by international donors, and
- information on laws and regulations affecting the agricultural sector.

The reasons for this information gap were mainly seen as (1) the organizations lacked the necessary funds to access (buy) them as they are expensive, and (2) that specific types of information were not available at all, not available in a systematic manner, or even contradictory. Compared to these reasons, the language gap does not seem to be a major hurdle in getting access to relevant information. Only a few organizations mentioned this issue, although at a later stage, when asked explicitly about this question, the majority saw this as a disadvantage.

On the other hand, respondents were uncertain as to who or which organizations should be the appropriate ones to provide this needed information. More than a third did not know of any specific one. Others had various public organizations in mind, such as the State Statistical Committee and research and training institutes. In addition, the Government in general, the Presidential Office and the Ministries of Agricultural Policy and Economics were mentioned. Some referred to private firms which earn their money by collecting, analyzing and disseminating agricultural information, such as for example APK-inform, Interfax or Agriukraine. In conclusion, it can be stated that there are high expectations for more agricultural information particularly from government agencies such as the State Statistical Committee and, to a lesser extent, from the Ministry of Agricultural Policy.

The surveyed organizations consider the Internet and printed media to be the most important sources for the missing information. As shown above the use of modern information technologies is widespread among the agricultural organizations. But there are difficulties regarding information support through electronic media within the country as not all the regional offices of the various organizations own computers nor do they have Internet access. So, the area-wide provision of information through this media is not possible at the moment. This leads to a situation where interviewed organizations use the Internet intensively in order to obtain information from international sources mostly at Headquarters, while this informational channel is little used for information provision at the regional and district levels.

4.4 Information provision and identified gaps

As discussed above, the agricultural organizations interviewed provide information externally to other organizations, government agencies and the general public, as well as internally only to their members. In this respect, the organizations were additionally asked what type of information they provided, to whom, the costs involved and how they evaluate the acceptance of the provided information among the (intended) recipients. With respect to the type of information seven broad categories of items were given.

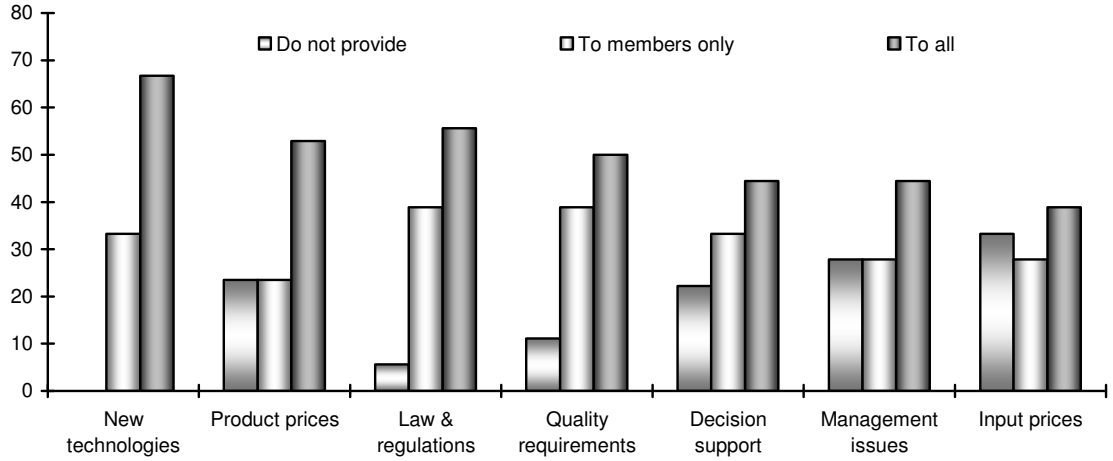
Table 9: Type of information provided by surveyed organizations

	Type of information	Reference number	Number of organizations
1	New technologies	S1, S2, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	18
2	Product prices	S4, P1, P2, P3, P4, P5, P7, P9, P10, P11, P12, M1, M2	13
3	Law and regulations with respect to agriculture	S1, S3, S4, P1, P2, P3, P4, P5, P6, P7, P8, P9, P10, P11, P12, M1, M2	17
4	Quality requirements	S1, S2, S3, S4, P2, P3, P4, P5, P7, P8, P9, P10, P11, P12, M1, M2	16
5	Decision support	S1, S2, S3, S4, P1, P3, P4, P5, P6, P7, P9, P11, P12, M1	14
6	Management issues	S1, S3, S4, P3, P4, P5, P6, P7, P9, P11, P12, M1, M2	13
7	Input prices	S4, P1, P3, P4, P5, P7, P9, P10, P11, P12, M1, M2	12

Source: IAMO Survey, 2006, point D6 of questionnaire.

Almost all organizations provided information on the adoption of new agricultural technologies, legal advice and quality standards (Table 9). Not as many were involved in providing information on management issues, input and product prices and decision support. More than half of all the organizations provide all seven types of information, i.e. S4 (NAUU), P3 (AUUAE), P4 (UAFLO), P5 (NUACU), P7 (NAAAS), P9 (UGA), P11 (RYU), P12 (FFCU) and M1 (magazine "Proposytsija"). Others are more specialized, like S2 (UkrINTEI) which focuses on decision support, new technologies and quality requirements, or P8 (OFU) which concentrates on new technologies, quality requirements, and laws and regulations.

Figure 8: Type and target groups of provided information (%), N=18



Source: IAMO Survey, 2006, point D6 of questionnaire.

In addition, respondents were asked whether the information was provided only to members or also to the general public (Figure 8). In general the agricultural organizations interviewed can be divided into three groups: most organizations provide their information both to members and the general public, i.e. S1 (MAPU), S2 (UkrINTEI), S4 (NAUU), P1 (UAC), P7 (NAAAS), P8 (OFU), P12 (FFCU), M1 (magazine "Proposytsija") and M2 (radio "Kolos"). A small group of organizations serve their members only, i.e. P5 (NUACU), P6 (NACUU), P9 (UGA) and P11 (RYU). Finally, there is a group of organizations which make available some types of information to the general public, while other types of information are restricted to their members. For example, S3 (UAAS) provides information

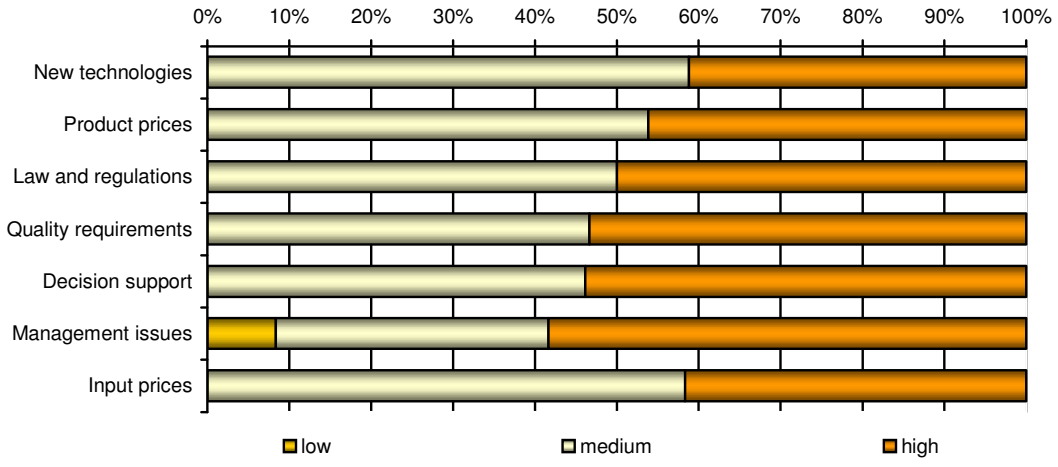
on new technologies to the general public, but data on quality requirements only to members. Similarly, P10 (Ukrsugar) provides information on input prices to members only, but data about product prices to the general public.

As discussed above, different organizations focus on different target groups. UkrINTEI, UGA, and NACUU do not address any information needs of agricultural producers whereas UAFLO and RYU have a strong focus on this and pass little information to other stakeholders. In order to link all relevant stakeholders, an organization should provide a wide range of information to all target groups. MAPU, NAAAS, UAC and AUUAE can be identified as the four organizations fulfilling these prerequisites. The magazine "Proposytsija" and the radio station "Kolos" also cover a wide range of target groups and disseminate information on six of the seven topics but obviously they cannot act as linking organizations.

With reference to cost recovery, the organizations interviewed follow different policies. Many organizations provide their information to both members and the general public free of charge, i.e. UAAS, UAC, OFU, Ukrsugar, RYU and FFCU. Although no information was provided by MAPU, it is assumed that their information is made available free of charge. Others provide information free of charge to their members while others have to pay, i.e. UAFLO, NUACU, NAAAS and UGA. Three organizations i.e. UkrINTEI, NAUU and the magazine "Proposytsija" charge both their members and the general public, equally. Only NACUU charges the general public a higher price than its members. Finally, NACU and AUUAE follow a split policy. Depending on the information provided, this is either free of charge for all, for members only, or non-members have to pay higher prices for it.

When questioned about the acceptance rate of their information by the respective recipients, respondents valued their own services rather critically (Figure 9), and consider only 50 percent of the information they provide as highly accepted. Information regarding management issues, decision support and quality requirements, seems to be better accepted than information regarding input and product prices and new technologies.

Figure 9: Acceptance of provided information (% of respondents)



Source: IAMO Survey, 2006, point D6 of questionnaire.

In an open question, respondents were asked about the main reasons for this rather bleak situation. They identified three major groups of information needs:

- First of all, respondents perceived a problem regarding the level of instruction. The educational level of the recipients is regarded as too low to understand and use the type of information that is provided.

- In addition, agricultural organizations lack the financial means to set up the viable technical infrastructure needed in order to reach the recipients in a timely, cost-efficient and easily understandable manner.
- Finally, respondents critically admitted that the quality of the information provided is rather low and, hence, not very attractive for the (intended) recipients. This refers, on the one hand, to the low quality of the information itself and, on the other hand, to the limited skills of the staff to process the key information properly and systematically so that it can be easily understood and used by the recipients.

Therefore, any improvements in ICT should not only address the technical infrastructure, but also the selection of appropriate technologies, the teaching of skills and incorporate stronger efforts on the part of the information providers to process information in a way that it can be easily understood by the intended users.

4.5 Organizations' strengths and weaknesses concerning ICT

Almost all agricultural organizations (15 out of 18, or about 83 percent) stated that they had devised an information and communication strategy in order to be better noticed by their members and the general public. The exceptions are UkrINTEI, AUUAE and UAFLO. In general, these strategies are limited to a regular distribution of information in the form of leaflets, news campaigns and personal meetings. Special reference has to be made to UkrINTEI. During the interview, it was stated that no information and communication strategy had been developed. However, this organization is the most important one which collects and disseminates a large number of data files and acts as a pool of information on Ukrainian agriculture. Data files range from lists of ongoing and completed scientific research projects, a compilation of all relevant laws and regulations, to a list of agricultural exhibitions. These data files can be accessed on its Web site by the general public for a fee. However, there had been a complaint that due to a lack of funds there was not enough staff and technical equipment to keep these files regularly updated.

In a final round, the representatives of the agricultural organizations were asked to identify the strengths and weaknesses of their own organizations with respect to ICT. First, they were asked about their strengths (Table 10). Up to five items could be listed. On average, three items were given. The most important factor (i.e. 20 out of 48 given items), was acknowledged to be the quality of the information, its timely availability and its reliability. This is rather surprising given the fact that the respondents identified the low quality of information as one factor leading to the low level of acceptance among the recipients. This could be understood as a self-critical demand for permanently improving one's own information. It also reflects the large heterogeneity of the agricultural organizations in Ukraine. As the next major factors of strength, they identified their good lobbying work on behalf of the interests of the recipients and networking (nine answers), the high standards of the means of communication (eight answers) and the qualified and experienced staff (five answers).

Table 10: Self-assessment of major strengths and weaknesses concerning ICT

Strength		Weaknesses	
Item	N*	Item	N*
- quality of information	20	- poor access to modern technologies	18
- lobbying and networking	9	- lack of finance	14
- communication means	8	- low skills of staff	8
- qualified and experienced staff	5	- other	5
- other	6		
Total	48	Total	45

Remarks: * N: Number of items given. Up to five items could be listed for each category.
Source: IAMO Survey, 2006, points D8 and D11 of questionnaire.

Respondents were also asked about the major weaknesses with respect to ICT they see for their organizations. Up to five elements could be given. In total, respondents listed 45 factors (Table 10). The most important are the following:

- No access or limited access to modern electronic technologies: as a major point of weakness respondents identified the limited, or sometimes total lack of access to modern technologies. This is closely connected with the lack of financial resources. Most organizations would like to expand the use of modern electronic technologies by utilizing more computers and making better use of the Internet.

- Lack of financial resources: most organizations do not have the financial means to provide information at a high level.

- Low level of skills among staff: besides the poor state of the available infrastructure, respondents complained about the low level of knowledge regarding the use of modern electronic technologies among their staff. Even when modern technologies are available, the staff is generally not trained in its use and lacks any experience in utilizing it efficiently.

Some branch associations mentioned insufficient cooperation with similar international structures as a weakness for their organization. The interviewed academic institutions stressed the limited access to international journals and scientific literature.

In a separate and specific question which could only be answered by either 'yes' or 'no', there was a query as to whether the insufficient knowledge of foreign languages would hinder access to relevant information. More than two thirds (13 from 18 organizations) of the organizations stressed this point as a problem for them.

4.6 International cooperation

In a separate question, the organizations were asked whether they were executing projects for national and/or international donors and how important these sources of funds were to their annual budgets. Many organizations were reluctant to provide any information on this topic as they were not prepared to discuss financial issues. During the interviews some organizations emphasized their international contacts, e.g. UAC with the World Bank, USAID and the German Advisory Group or OFU with FAO and International Federation of Organic Agriculture, but they did not mention any projects. Therefore, it can be assumed that the participation in internationally funded projects is much more important than stated in this document. Nevertheless, about two-fifths of all the organizations interviewed (7 out of 18, or 39 percent) confirmed that they had executed projects with international partners over the last five years. Four organizations, i.e. UAFLO, NUACU, NACUU and Radio "Kolos" mentioned that they had managed one project, two, i.e. RYU and FFCU had managed two projects while one organization, i.e. NAAAS had even managed four projects during this period. Hence, in total 12 different projects could be identified. In general, these projects focused on technical cooperation, organizational support, research collaboration and the dissemination of new techniques which included the improvement of their ICTs. Three projects were financed by SIDA, two projects by CIDA and USAID respectively; whereas the EU, DFID, "Women of Japan" and a Swedish organization for sexual education (RFSU) financed one project each.

For two agricultural organizations, i.e. NUACU and RYU international cooperation is undertaken on a regular basis, while two, i.e. FFCU and Radio "Kolos" had effected such cooperation once during the five year period and another three had undertaken international cooperation irregularly. Although this type of cooperation is only on a medium-term basis and not enduring, it is a very important source of income. With the exception of NACUU, all other organizations stated that the income derived from these projects constituted more than 50 percent of their total annual income. Hence, this type of cooperation not only gives access to international sources of information, but also ensures the economic survival of the respective organization.

No organization mentioned a project which they had executed with a national partner. In this respect, they rely on the annual budgets provided either by the state or by their members. Just one organization, FFCU mentioned that it was paid 10 000 UAH for undertaking a media campaign with national newspapers.

5. INSTITUTIONAL SETTING AND NETWORK

While the findings presented above show that the organizations interviewed focus on different topics and different target groups (stakeholders), they were also asked in an open question which organizations they themselves regarded as the most important within the agricultural sector. In a ranking order respondents could list up to five different organizations. It is evident that this ranking might be biased due to the sample of organizations, nevertheless it gives some indications about the most important organizations in the agricultural sector in Ukraine. Table 11 summarizes the results on a weighted scale (i.e. those organizations listed first got five points, those listed second got four points, etc.).

Table 11: The most important organizations in the agricultural sector (weighted scale), N=18

Rank	Name of organization	Weighted sum
1	Association of Private Farmers and Landowners (UAFLO)	62
2	Ministry of Agricultural Policy (MAPU)	40
3	Ukrainian Agrarian Confederation (UAC)	38
4	Agrarian Chamber of Ukraine (NACU)	23
5	National Association of Agricultural Advisory Services (NAAAS)	17
5	Specialized support organizations	17
6	All Ukrainian Union of Agricultural Enterprises (AUUAE)	15
7	Ukraine Academy of Agricultural Sciences (UAAS)	14
8	Government, in general	9
9	National Agricultural University (NAUU)	8

Source: IAMO Survey, 2006, point B1 of questionnaire.

It is to be expected that the organizations mentioned are those which either have a large number of members, e.g. UAFLO, AUUAE, etc. or have various key players among their membership, e.g. UAC, NACU, etc. UAFLO was mentioned as the most important organization, followed by MAPU and UAC. Nevertheless, it is surprising that being one of the key players of the agricultural sector, MAPU was not listed as the most important organization.

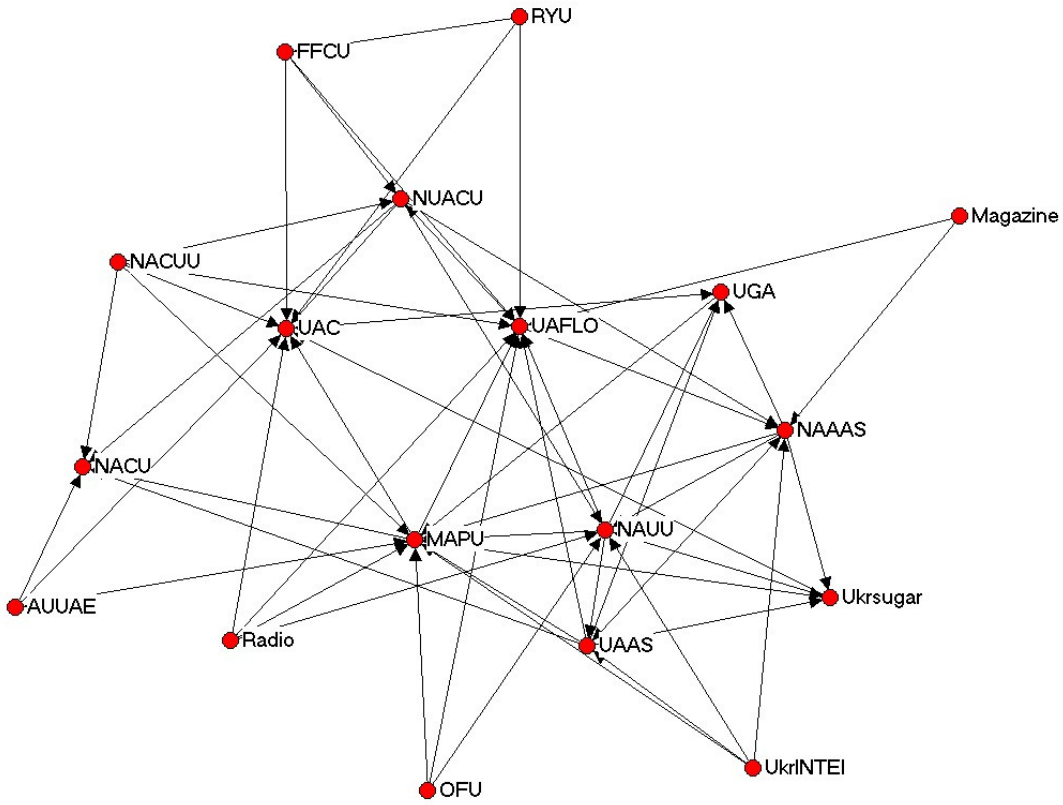
With regard to expectations, MAPU's role is fully acknowledged. The organizations interviewed were asked which other organizations should be more active in supporting the agricultural sector of the country. Again, in an open question, up to two organizations could be identified. Most of the respondents indicated MAPU, which was mentioned 11 times,

while UAFLO and NAAAS followed by a large margin. Both were only mentioned three times. The organizations primarily expect financial support, but also better access to information, advisory services and technical support.

Agricultural organizations in Ukraine are not working independently side-by-side, but are actively looking for various forms of cooperation with each other. The organizations were asked with which organization they cooperate most in the agricultural sector. In an open question, respondents could list up to five organizations with a diminishing priority. The findings are summarized in Figure 10 where the peak of the line indicates the recipient partner of that collaboration.

The findings clearly show that some organizations are more or less the focus of collaboration while others do not have that many links. Although Figure 10 may not illustrate the whole reality since it only depicts the network between the organizations in the sample, it shows that almost all the organizations collaborate with it in one way or another. It strongly emphasizes the dominant role of MAPU as the key player which was mentioned ten times. Another important actor in the agricultural sector is UAFLO which was also mentioned ten times, and UAC was mentioned nine times. These organizations are followed by NAUU and NAAAS which were mentioned six and five times, respectively. None of the organizations mentioned UkrINTEI as an important partner for collaboration within the agricultural sector while UkrINTEI listed various partner organizations. This may reflect the finding that agricultural organizations are, on average, not satisfied with the information provided by UkrINTEI and that its role as an information provider should be strengthened.

Figure 10: Cooperation with other organizations in the agricultural sector



Remarks: Only those organizations which were in the sample are included in Figure 10. Other mentioned organizations are not incorporated here, but see Table 12.

Source: IAMO Survey, 2006, point C3 of questionnaire.

Besides the organizations listed in Figure 10, which belong to the sample, quite a number of organizations had some form of cooperation with additional agricultural organizations. These are listed in Table 12 below. It shows that this network is indeed well developed and includes not only lobbying organizations but also private enterprises.

Table 12: Additional cooperation partners outside the sample and within the agricultural sector

Interviewed organization	Mentioned organizations within the agricultural sector
MAPU	Universities, exhibition centres
UkrINTEI	Universities
UAAS	Branch associations
NAUU	Branch associations, universities
UAC	Klub Syru Ltd., Ukrros Ltd., Gardens of Ukraine Ltd., Union of Ukrainian Dairy Enterprises, Bachmachesky Agrosojus Ltd.
NACU	Bears Ltd., Shuvar Wholesale Ltd., Bortnik Agriculture Ltd., Gercules Ltd., Zasjadko Agriculture Ltd.
AUUAE	Union of Agricultural Stock Exchanges, National Association of Trade Houses
UAFLO	Fermagropostach Ltd., Expocenter-Gospodar Ltd.
NUACU	Universities
NACUU	Consumers' Credit Association
NAAAS	Universities
OFU	Branch association (Ukrsoya)
UGA	Phytosanitary authority, Cargil Ltd., Nebulan Ltd.
Ukrsugar	Institute of Food Technologies
RYU	
FFCU	Agrarian Union
Magazine "Proposytsija"	
Radio Station "Kolos"	Gardens of Ukraine Ltd.

Source: IAMO Survey, 2006, point C3 of questionnaire.

In addition, respondents were asked whether they also cooperate with organizations outside the agricultural sector. Almost all of them do so, except for NUACU, OFU and RYU. However, it is noticeable that most organizations focus on governmental institutions like the Cabinet of Ministers and different ministries. The Ukrainian parliament and its institutions are partners of five organizations (MAPU, AUUAE, NACUU, NAAAS and NAUU). As organizations from the education and research sector the National Academy of Science was mentioned by NAUU and UAAS; the Moscow Centre for Scientific and Technological Information and the Institute for Cybernetics are cooperation partners for UkrINTEI. Most organizations do not cooperate with international organizations. UAC is an exception to this rule enjoying relations with USAID, the World Bank, the EU, the GFA, and the German Advisory Group on Economic Reform with the Government of Ukraine. USAID is also named as a partner by the radio station "Kolos". Private enterprises play an unimportant role for most organizations. Only NACU mentioned linkages to large enterprises active in the Ukraine, e.g. Kinto Ldt.

In addition to close cooperation some organizations are strongly connected through personal links, i.e. board members from one organization are also serving on the board(s) of other agricultural organizations. This reflects good networking but also an overlapping of activities. 11 out of the 18 organizations interviewed (or about two thirds) confirmed this fact about at least one person. Table 13 summarizes the overlapping membership of board members and lists the organizations involved.

Table 13: Overlapping membership of board members in other management boards

Organization interviewed	Organizations mentioned
MAPU	
UkrINTEI	Institute of Intellectual Property
UAAS	NAAAS
NAUU	UAAS
UAC	
NACU	
AUUAE	MAPU, Stock Exchange
UAFLO	Agricultural enterprise
NUACU	UAFLO
NACUU	National Cooperative Alliance of Ukraine, Commission for Agriculture by the Cabinet of Ministers of Ukraine
NAAAS	NACU
OFU	Ukragrofin
UGA	UAC, Coordinating Group of Grain Marketing
Ukrsugar	
RYU	
FFCU	UAFLO, UAC, Union of Employers
Magazine "Proposytsija"	
Radio Station "Kolos"	

Source: IAMO Survey, 2006, point C5 of questionnaire.

While these respondents did not state how actively these persons were involved in the respective management boards, it reflects an intense networking. This networking not only relates to organizations within the sector, but also to non-agricultural concerns.

6. CONCLUSIONS AND RECOMMENDATIONS

6.1 Conclusions

It was the objective of this study to identify the information and communication needs of relevant institutions and stakeholders from the national agricultural research system, extension services, NGOs, farmers' associations and representatives from rural men, women and youth, and larger agricultural enterprises. Representatives of the 18 national agricultural organizations selected by FAO in collaboration with the national project coordinator were interviewed. The major emphasis of the questionnaire was placed on obtaining first hand information regarding the actual state of technical infrastructure in the various organizations, their sources of information and how they provide information to the general public (external communication) and to their own members (internal communication). Similarly, the organizations were questioned about their own assessment of their information and communication strategies. In addition, there were some questions regarding their identification of key players and the collaboration and networking with other organizations within and outside the agricultural sector.

The respondents confirm that ICT is fairly well adopted in Ukraine. Almost all of them mentioned the use of Internet and e-mail. However, on closer investigation, modern electronic means of communication are widespread only in Kiev, but are lacking in the regions and districts. The technical equipment of the offices in the countryside is not up-to-date. Therefore, the linkages between the headquarters and the regional/ district offices are relatively weak and rely mainly on the use of the telephone, fax and written correspondence.

While it has been emphasized that the staff of the organizations had a certain minimum knowledge regarding the use of modern electronic technologies, there was a lack of in-depth skills. Hence, the available equipment could not always be utilized properly leading to a lower level of reliability. In addition, it was stressed that the quality of the modern electronic

sources of information is not regarded as being that good which reflects the poor competence of staff and the low technical standard available.

There is an urgent need for more and better processed information within the agricultural sector. The major emphasis has been put on the following four areas:

- market information systems: lack of statistical information, both nationally and internationally about markets, prices and market organizations;
- financial services regarding access to credits, particularly subsidized credits;
- planned and ongoing projects financed by international donors, and
- laws and regulations affecting the agricultural sector.

The main reasons for not being able to satisfy these information needs were the following: (1) a lack of necessary funds in order to purchase them; (2) that specific types of information are not available at all, not available in a systematic manner, or that various sources were providing contradictory statements which could not be verified from their side, and (3) the limited skills in foreign languages restricted access to international sources of information. There was an explicit desire to obtain more and better processed information regarding agricultural topics from government agencies, particularly the State Statistical Committee and MAPU.

The organizations utilize a variety of communication means for promoting and publicizing their own activities and information. The use of written correspondence, the telephone and television among the general means of communication; training courses, conferences and general assemblies among the traditional professional ones, and electronic newsletters, e-mail and Web sites among the modern electronic means are very common. However, the acceptance of these various means of communication in transmitting information appears to differ. Personal contacts are regarded as being most acceptable among the (intended) target groups followed by training courses, general assemblies and conferences, all of these means comprise a personal face-to-face component. The respondents admit that the acceptance rate among the target groups is not that high with respect to modern electronic means, if not combined with personal approaches.

With respect to the communications means used for approaching external stakeholders, the findings show that there is no differentiation between the various target groups. The same means are applied for almost all groups. This leads to the fact that specific target groups are approached through inappropriate communication channels. Therefore, some stakeholders are not approached with the means of communication which is the most appropriate one for them in order to utilize the information quickly. For example, agricultural producers are predominantly approached via television broadcasts and conferences but to a lesser extent via technical leaflets which can be seen as being more effective in the rapid dissemination of information and new technologies since many of these producers do not have the necessary funds to attend conferences.

Internal communication, i.e. exchange of information between management boards and members, is mainly concentrated on traditional means of communication, i.e. written correspondence, telephone and personal contacts. The use of modern electronic technologies is becoming more popular, but has its limits. The reasons for this appear to be two-fold. On the one hand, many members do not have the technical skills necessary for handling modern equipment and, on the other hand, many members lack the financial means to invest in new technologies at present. The organizations demonstrated a great need to improve their means of communication which refers particularly to the use of modern electronic technologies. Almost 90 percent of the respondents mentioned this fact. However, respondents also indicated a need to improve their traditional professional means of communication, such as the organization of workshops and training courses and the standards of professional journals.

Concerning the self-assessment of their major strengths and weaknesses a certain ambivalence has to be acknowledged. As their major strengths organizations listed: (1) the quality of information provided, its rapid availability and reliability, (2) their effective lobbying on behalf of their members, (3) the high standards of the means of communication, and (4) the qualified and experienced staff. On the other hand, most of these issues are identified as their major weaknesses which can be structured as follows:

- No or limited access to modern electronic technologies: as a major point of weakness respondents identified the limited or, sometimes, no access to modern technologies. This is closely linked with the lack of financial resources. Most organizations would like to expand the use of modern electronic technologies in utilizing more computers and making better use of the Internet.
- Lack of financial resources: most organizations do not have the financial means to provide information at a high level.
- Low level of skills among staff: besides the poor state of the available infrastructure, respondents complained about the poor level of knowledge among their staff regarding the use of modern electronic technologies. Even, if modern technologies are available, staff is, in general, not trained and lack any experience in utilizing these technologies efficiently.
- Language: due to poor language skills, staff is only in a modest position to access international sources more thoroughly and in a more structured way.

This ambivalence of answers might reflect on the one hand, the large heterogeneity of the agricultural organizations themselves in Ukraine. On the other hand, these statements express the personal feeling of the respondents that the organizations have already achieved something compared to the situation some years ago, but that there is still a long way to go.

One important positive point is the good level of communication and cooperation among the various agricultural organizations. There is a permanent exchange of information. This cooperation of the various organizations not only involves the agricultural sector but also the non-agricultural one. Those partners outside of the sector are mainly government agencies and just a few are private companies. However, cooperation at the international level is still low and more integration was desired. On the other hand, there is a considerable amount of overlapping of the various members of the management boards among the agricultural organizations. In this respect, an informal flow of information can be achieved very quickly. But the information has to be better structured and processed in order to be of use to people working in the agricultural sector. The organizations which they themselves identify as the most important ones are besides MAPU; UAFLO, UAC and NAAAS, followed by NAUU and UAAS. MAPU has a key role in facilitating and coordinating the flow of information among the various organizations.

With regard to ICT, UkrINTEI has a special role to play. It is the most important Ukrainian organization operating in that field and has access to a vast reserve of data files about the sector. Potentially, it could play a leading role, together with MAPU, in collecting and disseminating information. That it has not been identified as a major player reflects the fact that its services are neither up to standard nor made available to the other stakeholders in an appropriate manner. Definitely, its services are not fully acknowledged.

6.2 Recommendations

One of the major conclusions of the interviews is that most agricultural organizations in Ukraine do not have sufficient funds to improve their operations. At this stage, we are not in a position to suggest ways to increase the financing of these organizations beyond the

expansion of the number of their clients/members and the collection of additional fees. With respect to the other issues, the recommendations are as follows:

- In order to enforce the dissemination of information between the main stakeholders not only in the capital city, but also in the rural areas, the government is advised to be more active in building up and investing in the necessary communication infrastructure. This includes satellite lines and other IT investments. As there may be budgetary limits, the private sector could possibly take over this part, at least to some extent. However, since the private sector would most probably concentrate on the economically prosperous regions, the government should provide financial support in building up and improving the communication infrastructure in the rural areas.
- Each agricultural stakeholder is responsible for financing the necessary hardware in order to utilize the communication infrastructure efficiently. No government support should be provided in this respect.
- The spread and provision of modern hardware only makes sense if it is combined with the adequate training of staff in the use of modern electronic technologies. This skills training should include not only training in using modern technologies properly, but should also focus on techniques regarding how to identify relevant information, how to distinguish accurate from not so reliable sources of information, and how to process technical and other information in such a way that it can be easily understood by the respective stakeholders. A feedback mechanism from user to information providers is needed to ensure that the information provided is relevant for users. The improvement of the foreign language skills of respective staff should be part of the human capital development programme.
- MAPU is encouraged to play the leading role in facilitating and coordinating the information flow more efficiently. MAPU should provide the statistical data and other information, e.g. up-to-date information on legal issues, access to financial services or regarding quality requirements and phytosanitary standards. MAPU should also play a unique role in collaborating with other public agencies and international donors to facilitate better access to their information, for example food safety and quality information from the Ministry of Health, trade data from the Customs and Statistics Committee, or training opportunities at donor projects, etc.
- While the communication links are quite good among the agricultural organizations, MAPU could improve collaboration by organizing seminars, workshops, and/ or round tables on specific actual and required issues. These events could also be used by MAPU to obtain bottom-up information from non-government organizations.
- Besides MAPU, other agricultural organizations which have good networking strategies within and outside the sector could become focal points for collecting and disseminating information in a rapid, efficient and reliable manner. Such organizations are UAFLO, UAC, NAUU and NAAAS.
- UkrINTEI could play an important role in ICT regarding the agricultural sector of the country. It should be strengthened in order to become a vital partner for the various stakeholders. It appears that it can rely on a vast reserve of information, but does not have the knowledge regarding how to disseminate it for the benefit of the country. The information has to be processed in a systematic manner and it has to be easily understandable for the end-user.
- The collection and dissemination of reliable information is costly. Therefore, any user should pay for it. The Government might support the build up and running of information systems if there is a quick economic benefit. However, any financial

support should be given in a gradually decreasing manner and this support should cease after a certain period of time.

- Agricultural organizations should make use of the various means of communication in a more flexible manner. For the various groups of stakeholders the most appropriate means need to be identified to improve the information flow. In Table 14 the most reliable communication means for the respective target groups are summarized as recommended by the authors. For agricultural producers particularly, technical leaflets could be a cheap and easy means for disseminating information. Scientists, students and extension experts are in general familiar with modern electronic technologies and accept them well. They could receive their information by e–mail and electronic newsletter. External communication should mainly focus on conferences, fairs and Web sites while internal communications should mainly make use of written correspondence, leaflets and Web sites.

Table 14: Recommendations for strengthening recipient-oriented communication means

Communication means	Target groups *										
	1a	1b	1c	2	3	4	5	6	7	8	9
Television			x					x		x	
General newspapers			x					x		x	
Radio			x					x		x	
Personal contacts	x			x	x						
Training courses, workshops	x	x									
Fairs	x	x			x	x					
Agricultural newspapers	x	x									
Conferences	x	x		x	x	x	x		x	x	x
Books				x							x
Professional journals				x							x
Technical leaflets	x	x	x								
Web sites	x			x		x					x
E-mail	x			x		x					x
Electronic newsletters	x			x		x					x
CDs											
Electronic discussion fora											

Remarks: * 1a: corporate farms, 1b: family farms, 1c: household plots, 2: scientists, 3: politicians, administrators, 4: extension experts, 5: processors, 6: consumers, 7: wholesale operators, 8: retailers, 9: students

Source: Own table.

- While networking at the national level is relatively good, it is not as well developed at the international level. Most agricultural organizations lack integration into international networks or organizations. Hence, the possibility of collaboration with international partners on a permanent basis is very limited. Some organizations have joined their international umbrella organizations. Others rely on internationally funded projects, but these links cease once the project is terminated. Therefore, active support for most organizations is needed to get access to the respective international networks.

Finally, two relevant points have to be emphasized which could not be clarified through this analysis. On the one hand, it was not possible to assess with the final recipients, i.e. the agricultural producers, what their actual information needs are and what they thought about the type and quality of information provided by the various agricultural organizations. On the other hand, no critical assessment could be made regarding what type of information is really available among the various organizations and what their ICT strategies really look like. For

example, it was beyond the scope of this analysis to clarify what types of data sets are available, what time series, on what products, regions, etc. Therefore, this analysis should be seen as a starting point for further in-depth analysis in the future.

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ANNEX 1: LIST OF ORGANIZATIONS AND PERSONS INTERVIEWED

	Organization	Name, position	Post address	Telephone	Fax	E-mail	Web page
S1	Ministry of Agricultural Policy of Ukraine	Popudribko, Volodymyr, Head of Department	01001 Kiev, Xreschatyk Str. 24	+38 044 2788094		agrotp@minapk.kiev.ua	www.minagro.gov.ua
S2	Ukrainian Institute of Scientific-Technical and Economic Information (UkrINTEI)	Deribon Tatiana, National Coordinator	03680 Kiev, Gorkogo Str. 180/304	+38 044 5210930	+38 044 5282541	agro@uintei.kiev.ua	www.uintei.kiev.ua
S3	Ukraine Academy of Agricultural Sciences (UAAS)	Kropivko, Mykhailo, Acting Academician Secretary	01010 Kiev, Suvorova Str. 9	+38 044 2889860	+38 044 2809473	econom@uaan.kiev.ua	www.uaan.kiev.ua
S4	National Agricultural University of Ukraine (NAUU)	Melnychuk, Dmytro, Rector	03041 Kiev, Heroyiv Oborony Str. 15	+38 044 2575175	+38 044 2577155	rectorat@nauu.kiev.ua	www.nauu.kiev.ua
P1	Ukrainian Agrarian Confederation (UAC)	Danylenko, Sergiy, Deputy Head	01033 Kiev, Saksaganskogo Str. 53/80, 807	+38 044 2876566	+38 044 2843238	danylenko@agro-ua.org	www.agro-ua.org
P2	Agrarian Chamber of Ukraine (NACU)	Petrenko, Sergiy, Executive Director	02660 Kiev, Popudrenka Str. 52/417	+38 044 5522088	+38 044 5523347	spetrenko@agrichamber.org.ua	www.agrichamber.org.ua
P3	All-Ukrainian Union of Agricultural Enterprises (AUUAE)	Jaroshevetz, Vasyl, Deputy Head	01001 Kiev, Xreschatyk Str. 24	+38 044 2263042	+38 044 2782984		
P4	Ukrainian Association of Private Farmers and Landowners (UAFLO)	Kapshtyk, Mykhailo, Deputy CEO	01010 Kiev, Suvorovba Str. 9, box 26	+38 044 5017873	+38 044 5017873	Mykhaylo.Kapshtyk@tcc.kiev.ua	www.farmer.org.ua

	Organization	Name, position	Post address	Telephone	Fax	E-mail	Web page
P5	National Union of Agricultural Cooperatives of Ukraine (NUACU)	Bezvershenko, Vasil, Director	01001 Kiev, Xreschatyk Str. 7/11 508	+38 044 2791570	+38 044 2791570	unuac@ukr.net coop@coop.in.ua	www.coop.in.ua
P6	National Association of Credit Unions of Ukraine (NACUU)	Kozynetz, Petro, President	01000 Kiev, Chernovola 25/49	+38 044 5011875	+38 044 5011876	unascu@unascu.org.ua	www.unascu.org.ua
P7	National Association of Agricultural Advisory Services (NAAAS)	Shmidt, Roman, President	01010 Kiev, Suvorova Str. 9/111	+38 044 4514456	+38 044 4514456	roman.shmidt@dorada.org.ua	www.dorada.org.ua
P8	Organic Federation of Ukraine (OFU)	Milovanov, Eugene, President/CEO	01001 Kiev, Gospitalna str. 12	+38 044 2340054	+38 044 2705363	ofu@organic.com.ua	
P9	Ukrainian Grain Association (UGA)	Artiushyn, Oleksandr, Deputy General Director	01033 Kiev Saksaganskogo Str. 53/80, 904	+38 044 2875477	+38 044 2466202	artiushyn@uga.kiev.ua	www.uga-port.org.ua
P10	National Association of Sugar Producers of Ukraine (Ukrsugar)	Petrichenko, Alexandr, Deputy Head	01001 Kiev, Grinchenko Str. 1	+38 044 2797850	+38 044 2797850	petrech@ukrsugar.com	www.ukrsugar.com
P11	Rural Youth Union (RYU)	Kovtun Olena, Head	02096 Kiev Sormovska Str. 3/7	+38 044 5661330	0038 044 5664594	kovtun_olena@ukr.net	www.farmer.com.ua
P12	The Female Farmers Council of Ukraine (FFCU)	Klebanova, Ludmila, Head	65069 Odessa, Zabolotnogo Str.35/137	+38 0487 351201	+38 0482 541886	agro@te.net.ua	
M1	Magazine “Proposytsija”	Sidorenko, Olga, Project manager	01054 Kiev, Turgenevska Str. 38	+38 044 4844148	+38 044 4940906	olyas@invest-group.com	www.propozitsiya.com
M2	Radio “Kolos”	Pischyk, Volodymyr, Deputy Director	01001 Kiev Xreschatyk Str. 26	+38 044 2794572			

ANNEX 2: OVERVIEW OF THE AGRICULTURAL ORGANIZATIONS INTERVIEWED

Ministry of Agricultural Policy of Ukraine (S1)

The Ministry of Agricultural Policy of Ukraine (MAPU) is the main governmental body in the agricultural sector. Its main task concerns ensuring the implementation of state agricultural policy with respect to agriculture, horticulture, viticulture, processing industry and fishery. This includes all aspects of agro-food security and the enforcement food safety standards, law and legislation activities. It also coordinates the activities of regional governmental bodies in the agricultural sector on these issues.

Ukrainian Institute of Scientific-Technical and Economic Information (S2)

The Ukrainian Institute of Scientific-Technical and Economic Information (UkrINTEI) is the leading national information centre and one of the main players in the field of scientific-technical (as well agricultural) information. It was founded in 1958. It is also the National AGRIS Resource Centre which supports the international exchange of scientific-technical information. It develops and maintains the database of different types of scientific information and results of scientific-technical activities which can be accessed at its Web site for a fee. All ongoing, operating and completed scientific projects and reports (as well as Ph.D. and D.Sc. thesis) have to be registered in the institute database. The main task of the institute is to provide users who are mainly researchers, politicians and representatives from private companies with different kinds of scientific information. The institute is situated in Kiev but it has about 100 branch offices spread all over the country. UkrINTEI is state-funded, its annual budget amounts to approximately seven million UAH and it employs 161 persons.

Ukrainian Academy of Agricultural Science (S3)

The Ukrainian Academy of Agricultural Science (UAAS) is a leading scientific self-governing state institution. It was founded in 1931. All 60 research institutes of the country are members which employ about 5 558 scientists, of whom about 2 400 have a Ph.D. or a D.Sc. degree. The main task of the UAAS is to provide, coordinate and disseminate scientific and informational support within the agricultural sector. It is state-funded and its annual budget amounts to approximately 145 million UAH.

National Agricultural University of Ukraine (S4)

The National Agricultural University of Ukraine (NAUU) is the largest agricultural educational centre of the country. It was established in 1898. It has more than 32 000 students. About 1 323 researchers and professors are working at the university. The main task of the university with respect to information and communication services is to disseminate new scientific information concerning agriculture. Its scientific output is concentrated in two journals: “Scientific Bulletin of NAUU” and “Mechanization of Agricultural Production”. The university has its own Education and Information Centre for Computer Technologies which connects the department of education and research institutes, research centres, library, administration offices and services. It works on the development of information systems. The Centre is responsible for maintaining the automated library system and centralized database management system. Similarly, it is responsible for updating the World Electronic Catalogue of Higher Education and Research Institutions for Agriculture. The NAUU Scientific Library Centre is an information-consulting centre for agrarian educational institutions. The University is the major educational institution for agricultural specialists in the country. It is state funded.

Ukrainian Agrarian Confederation (P1)

The Ukrainian Agrarian Confederation (UAC) as an All-Ukrainian non-profit and non-governmental organization was founded in 2002. It unites over 40 agricultural processing and trading companies, but not many agricultural producers. The annual membership fee starts at 1 000 UAH up to 20 000 UAH, depending on the annual turnover. Its annual budget amounts to approximately 150 000 UAH. It does not receive any financial support from, the government. At the main office of UAC in Kiev seven persons are engaged in its activities. The Confederation sees its main tasks in lobbying for the interests of its members, consulting activities, providing its members with reliable information about new legislation, news on the agrarian markets, providing training and educational activities, as well as organizational and scientific support of conferences and workshops. It has representative offices in 20 out of 25 regions and in some administrative districts. It has built up a good reputation and cooperates with various international organizations such as the World Bank, USAID and the German Advisory Group.

National Agricultural Chamber of Ukraine (P2)

The National Agricultural Chamber of Ukraine (NACU) is an independent All-Ukrainian public non-profit organization that unites citizens of Ukraine who are engaged in production, trading and processing of food and agricultural products, input supply, agricultural machines, agricultural financing, research and education as well as agricultural extension activities. It was established in 2005. In the main office in Kiev a staff of 60 persons is in charge of about 270 members, most of them are legal entities. The annual membership fee amounts to about US$40 for private individuals and between US$200 and 4 000 for legal entities depending on their annual turnover. No information had been given about the annual budget. But it was emphasized that it does not receive any financial support from the government. NACU has representative offices in 20 regions of Ukraine and up to five in each region. Its main tasks with respect to information and communication activities are to promote the popularization and information spread of education programmes and projects and to facilitate the conditions for its members to get better access to information and databases. Similarly, it disseminates information about new technologies, input and market prices, quality requirements and legal issues. In addition, the Chamber is actively lobbying among politicians on behalf of its members.

All-Ukrainian Union of Agricultural Enterprises (P3)

The All-Ukrainian Union of Agricultural Enterprises (AUUAE) is a successor of the former Council of Kolkhozes and Sovkhozes. It was registered in 2001. At its main office in Kiev eight employees are in charge of about 14 000 members who are mostly made up of large agricultural enterprises. The annual membership fee stands between 1 000 and 10 000 UAH depending on the area cropped. Its annual budget amounts to approximately 180 000 UAH which reflects the low payment morality of the members. The Union does not receive any support from the Government. The Union has its representative offices in all Ukrainian regions and districts. The main task of the Union refers to lobbying at the political stage for the interests of its members, providing them with reliable information about new laws and legislation, modern technologies, supply and marketing support, as well as consulting and extension services. In addition, the Union cooperates with suppliers of agricultural productive means.

Ukrainian Association of Private Farmers and Landowners (P4)

The Ukrainian Association of Private Farmers and Landowners (UAFLO) is a non-profit, non-governmental organization that unites over 43 000 farmers, owners of individual household plots and others non-government agricultural organizations. It was set up in 2002.

The membership fee is based on the area cultivated by each member, i.e. it stands at 1 UAH per hectare owned and at 0.5 UAH per hectare rented. No information was given about the annual budget, but more than 50 percent is covered by international sources. It does not receive any support from the Government. The main tasks of the Association comprise the support of sustainable development among farmers in Ukraine, the provision of its members with reliable information about new technologies, about new laws and regulations with respect to land markets, the support of its members in marketing activities, provision of extension services and the dissemination of information about new projects and education programmes for its members. Its main office is situated in Kiev with a staff of 23 persons. The Association can rely on a well developed network of representative offices spread all over the country. This helps in collecting and disseminating information very quickly.

National Union of Agricultural Cooperatives of Ukraine (P5)

The National Union of Agricultural Cooperatives of Ukraine (NUACU) is an All-Ukrainian non-profit, non-governmental organization which unites all types of cooperatives in the agricultural sector. It was established in 1998 with the purpose of supporting its members in the establishment of cooperatives, to provide its members with reliable information about new laws and regulations, markets, product prices, quality requirements, new technologies, international projects, financing possibilities, to represent their interests to the administrative authorities and to provide extension services free of charge for the members and marketing support, training and education activities. NUACU has its main office with three employees in Kiev and operates representative offices in four regions. Its membership is about 400. The membership fee is based on the area cultivated by each member, i.e. it stands at 1 UAH per hectare owned and at 0.5 UAH per hectare rented. The annual budget amounts to 162 000 UAH. Nevertheless, about 50 percent of the budget is covered by international sources. The Union does not get any support from the Government.

National Association of Credit Unions of Ukraine (P6)

The National Association of Credit Unions of Ukraine (NACUU) was founded in 1994 in order to coordinate and support the development of credit unions in the Ukraine. It unites 153 credit unions from a total number of 720 in 18 regions. The total number of individual members under its umbrella amounts to about 500 000, or more than 50 percent of all individual members in the country, and its combined assets amount to about 500 million UAH. Roughly 30 percent of all credits in 2005 were assigned to rural areas and about 8 percent to the agricultural sector. The annual membership per credit union amounts to between 400 and 8 000 UAH depending on the annual turnover. No information about its annual budget was given, but it was emphasized that it does not receive any support from the Government. NACUU sees its main tasks in drafting laws and regulations with respect to a better development and functioning of credit unions, strengthening the infrastructure for credit unions, consulting its members on financial issues, providing educational and training programmes. The Association is assigned to fulfil some state duties in controlling and supporting its members in financial issues. The main office is situated in Kiev. It is a member of the World Council of Credit Unions (WOCCU).

National Association of Agricultural Advisory Services (P7)

The National Association of Agricultural Advisory Services of Ukraine (NAAAS) is an independent All-Ukrainian non-governmental, non-profit organization which represents professional people engaged in an advisory activity, such as agricultural advisors or expert advisors as well as independent local advisory services. The Association was set up in 2003. The Association has about 1 500 members, of which 500 are professional advisors, more than 1 000 are expert advisors who are specialized in a different subject and 30 agricultural advisory services from 24 Ukrainian regions and the Autonomous Republic of Crimea. The

annual membership fee amounts to 500 UAH. The annual budget amounts to 620 000 UAH, of which the major part is covered by international sources. In addition, the Association receives some non-financial support from the Government. The aim of the Association is to meet the needs of family farms, individual subsidiary plot owners and other types of farms and agricultural enterprises as well as the rural population in general in increasing the level of knowledge and practical skills in profitable management, improvement of well-being, rural communities' formation and development of rural areas. NAAAS provides its members with reliable information about input and output markets, price information, quality requirements, laws and regulations and new technologies. The main office is situated in Kiev with a staff of three persons.

Organic Federation of Ukraine (P8)

The Organic Federation of Ukraine (OFU) is a non-profit organization and was set up in 2005. Its primary objective is the dissemination and spreading of information among producers and consumers about the advantages of organic and biological farming. At present, it unites about 30 members from both individual and corporate farms. It has three employees working at its main office in Kiev. No information about membership fees and the annual budget were given, but some non-financial state support has been acknowledged. The main tasks of the Federation are the following: assistance in developing and implementing new and applied technologies for organic producers, development of markets for organic products, establishing and supervision of quality standards, provision of information on prices and markets as well as support in drafting laws and regulations promoting and safeguarding organic farming.

Ukrainian Grain Association (P9)

The Ukrainian Grain Association (UGA) is a non-profit private organization. It comprises more than 60 Ukrainian and international companies as members, such as trading companies, grain elevators, bread producing enterprises, transportation firms, agrarian stock exchanges and agricultural producers. The UGA was established in 1998 with the purpose of undertaking sound reorganizations of the grain market in Ukraine. The UGA provides its members with up-to-date information. This includes sending out press summaries and price information concerning the grain markets on a weekly basis, agrarian news, world grain prices, analytical materials, laws and regulations in Ukraine and abroad, and legal support. A part of this information can be found with free access on the UGA Web site. 16 employees are working at the main office in Kiev. UGA maintains representative offices in some regions of the country. The annual membership fee amounts, at a minimum, to 2 500 UAH. The annual budget of the Association amounts to 900 000 UAH. Some non-financial support from the Government has been acknowledged.

National Association of Sugar Producers of Ukraine (P10)

The National Association of Sugar Producers of Ukraine (Ukrsugar) is a non-profit public organization which unites about 350 processing enterprises, producers and trade companies. It was registered in 1997 and is the successor organization of the Soviet company "UKRSUGAR". The annual membership stands at 1 UAH per ton of processed sugar. The main task of the Association is to provide its members with information about new technologies, the actual and future situation on national and international sugar markets, sugar prices, reliable information about laws and regulations as well as lobbying for the interests of its members, legal support and better access to financial services. The Association has been entrusted with some state duties in drafting laws about a better functioning of the sugar market. 21 employees are working at the main office in Kiev. The Association is a member of the International Sugar Organization.

Rural Youth Union (P11)

The Rural Youth Union (RYU) is a non-profit organization that unites young people up to the age of 35 living in rural areas. It was registered in 2005 and is a successor of the Committee of Young Farmers which used to be a part of UAFLO and has over 2 000 individual members. RYU has representative offices in 17 regions. Four employees are working in the head office in Kiev. The main goal of the organization is to provide information and technical support for young farmers and particularly for those who intend to set up a new farm enterprise. In addition, it organizes conferences, meetings and workshops and organizes international young farmers' exchange programmes. The annual membership fee amounts to 60 UAH, but not many members are actually paying these fees since the annual budget amounts to only 330 000 UAH. At present, all activities and the staff are financed through international sources.

Female Farmers Council of Ukraine (P12)

The Female Farmers Council of Ukraine (FFCU) is a non-profit organization of individual female farmers. It was set up in 1994, but there is an ideological link to the pre-independence organization "Women Studio". Unfortunately, no information about the number of members was given. The Council does not employ any staff; all activities are done on an honorary basis. The annual membership fee amounts to 10 UAH. Its annual budget stands at 600 UAH. It does not receive any support from the Government, but it receives funds from international sources at irregular intervals. Its main office is located in Odessa and it has representative offices in 15 regions and in 30 districts. The main goal of the organization is to provide information and technical support for female farmers. In addition, it organizes conferences, meetings and workshops, and provides educational services to its members.

Magazine "Proposytsija" (M1)

The "Proposytsija" is an independent magazine about agribusiness which was founded in 1994. It focuses on managers of corporate farms, individual farmers and students. The publisher of the magazine is "Univest Media" – a unit of the "Univest Marketing" company - which deals, among other things, with advertising, market research, dissemination of agricultural information, and exhibition activities. The editorial staff consists of 13 employees in Kiev. The articles in the magazine cover a wide spectrum of agricultural information: agrarian policy, agricultural news, information about new technologies in crop and animal production, and economic issues. The magazine is published monthly. In general, one issue is made up of about 160 pages and the number of copies stands at 20 000.

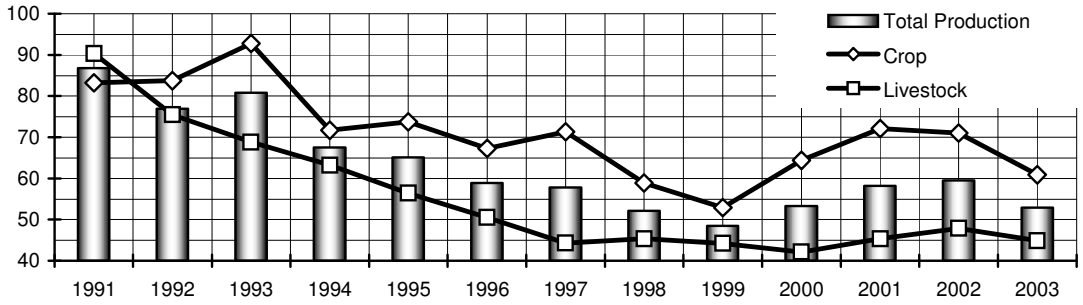
Radio Station "Kolos" (M2)

The radio station "Kolos" is the state governed cable radio station which is part of the National Radio Company of Ukraine. It has a long history and was founded in 1966. It obtains financial support from the Government. The staff of the radio station consists of six employees. Its information activities mainly concern issues in the agricultural sector. Its programmes are broadcast in the Ukrainian language and it covers the whole country. On average, about 10 million persons are listening to its programmes.

ANNEX 3: OVERVIEW OF THE AGRICULTURAL SECTOR IN UKRAINE

Ukrainian agriculture is currently in a phase of economic growth after many years of decline. However, it is unclear whether this growth will be sustainable over time. The contrast between the potential of the agricultural sector and its present precarious state remains striking, and its reorganization should lead to an increase of its international competitiveness, thus transforming it into a driving force for the Ukrainian economy. Compared to other transition countries, the adjustments to the market have been very sluggish. This also concerns the agricultural sector, which, with its share of 13 percent of GDP (compared to 16.4 percent in 1991) and 4.9 million employees (2 percent of total employees) is one of the most important Ukrainian sectors. Once the "bread basket" of the former Soviet Union, Ukraine's agricultural sector drastically decreased its production over the transition period. From 1990-1999 the decline of agricultural output equalled 51 percent, but was followed by slight growth in recent years (A-Figure 1).

A-Figure 1: Ukrainian Agricultural Production 1991-2003, 1990 = 100%



Source: The State Committee of Statistics of Ukraine, 2003.

The Ukrainian agricultural sector is composed of roughly 14 300 large-scale enterprises (LSE) of over 2 388 ha of arable land each on the one hand, and about 11 million individual household plots (IHP) of 0.8 ha each on the other. The former group accounts for over 79 percent of the agricultural land and roughly 39 percent of the agricultural production in Ukraine, while corresponding shares for the latter group is 13 percent and roughly 58 percent, respectively (A-Table 1). The large-scale enterprises are successors of the former collective enterprises (so-called *Kolkhozes* and *Sovkhozes*) that characterized Soviet agriculture since collectivization, while the household plots generally represent the 'satellites' of these large farms and are operated by their employees and their families. The group of intermediate-sized private farms in between these two poles accounts for a relatively large number of enterprises – over 43 000, but only small shares of Ukrainian's agricultural land and production. Noteworthy economic potential cannot be assigned to them at present.

A-Table 1: Distribution of total farm number, size and production in Ukraine (2003)

	Large enterprises	Private farms	Household plots
Number of units	14 300	43 016	11 000 000
Average size (hectares)	2 388	72	0.8
Share of agricultural land (%)	79.6	7.4	13
Share of agricultural production (%)	39.1	2.7	58.2

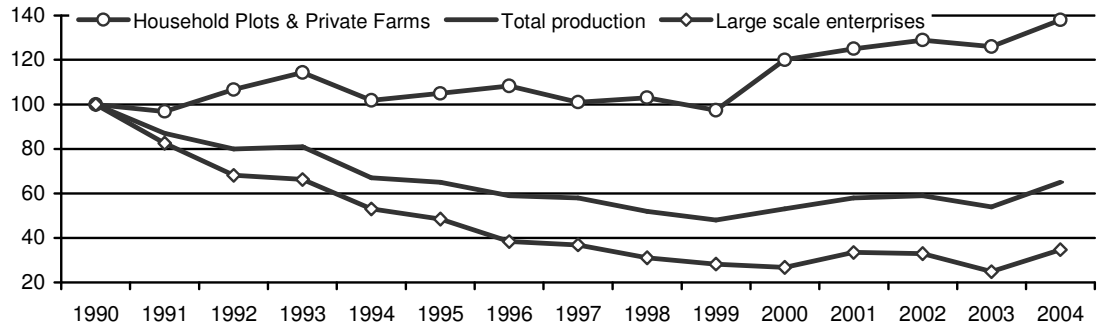
Source: State Statistical Committee of Ukraine, 2004.

As the comparison of area and production shares in A-Table 1 illustrates, LSE and IHP enterprises and household plots operate at very different levels of intensity, with the household plots producing substantially more agricultural output per unit of land. These distinctions can be derived from differences in production patterns between LSE and IHP, and in their production efficiency. The IHP (and private farms) in Ukraine focus predominantly on

labour-intensive crops such as potatoes (99 percent of total production), vegetables (87 percent) and livestock products (meat: 66 percent and milk: 80 percent), while the LSE account for much greater shares of grain (72 percent), oilseed and sugar beet production (84 percent and 77 percent respectively).

A-Figure 2 shows that since the beginning of transition, the share of IHP and private farms in gross agricultural output has grown by roughly 38 percent, while LSE has decreased to roughly 35 percent of its 1990 level. However, these figures must be interpreted with caution. On the one hand, there are some indications that the trend of decreasing LSE production has ended. On the other, the LSE and the IHP that are associated with them are strongly interlinked, making it very difficult to accurately account for inputs and outputs. Most IHP operators are simultaneously employees of large farms, and as such have access to feed, fertilizer, seed and livestock, sometimes at preferential prices. As a result, official statistics probably attribute a significant amount of agricultural output that actually originated on LSE to IHP, and the latter seem to be more efficient than, in fact, they are.

A-Figure 2: Agriculture Production in Ukraine 1990-2004, 1990=100%



Source: State Statistical Committee of Ukraine, different issues.

In spite of existing problems, positive trends in the agricultural sector's development can be observed, and Ukrainian agriculture remains a very promising sector of the economy. Moreover, enacted reforms and the transition to a market economy create increasing demand for various types of information for different types of producers. Reliability and timeliness seem to be major factors of this.

ANNEX 4: QUESTIONNAIRE

QUESTIONNAIRE FOR UKRAINIAN AGRICULTURAL ORGANIZATIONS/INSTITUTIONS

Introductory Remarks

This questionnaire is about the organizational structure in the agricultural sector in your country and about the role of these organizations or institutions in that sector. We especially focus on the information and communication system of the sector. All figures refer to the current state in February 2006.

All data and information gathered for this study will be summarized for analysis and contribute to the preparation of a FAO report focusing on the assessment of needs of the information and communication system of the agricultural sector. The report will be discussed during a seminar with participation of major national stakeholders in the agricultural information sector and used for the development of a national agricultural information strategy, based on the requirements of different types of users.

ID of questionnaire: _____

Date: _____ February 2006

A. Basic information about your organization/institution

(1) Name and Title of respondent:
His/her position in the organization/institution:

(2) Name of the organization/institution:
Address:
Telephone:
Fax:
E-mail:
Homepage:

(3) Type of organization/institution (Mark those types that describe your organization/institution best. *More than one answer is possible.*)
( ) Research institute
( ) University
( ) Government Department
( ) Youth organization/women organization
( ) State-run profit oriented
( ) State-run non-profit oriented
( ) Association of agricultural producers
( ) Company specialized in agricultural extension
( ) Other private profit oriented companies
( ) Non-Government Organization/non-profit organization
( ) Other, please state the type: _____

(4) Function of organization/institution (Mark those functions that describe your organization/institution best. *More than one answer is possible.*)
( ) Policy and planning
( ) Administration

( ) Lobbying
( ) Research
( ) Agricultural production
( ) Processing
( ) Input supply company
( ) Consulting
( ) Education
( ) Information
( ) Extension
( ) Marketing
( ) Other, please state the function: _____

(5) Number of employees total:
there of number of employees in managerial positions/professors:
for universities number of students:
for farmers' associations and parties number of members:
membership fee: _____UAH/year
financial support from the state ( ) yes ( ) no
non-financial support from the state (office, staff, less operating expenses) ( ) yes ( ) no

(6) On which geographic level are you working? *More than one answer is possible.*

( ) International
( ) National
( ) Only in specific regions
Please list the regions: _____
_____
_____

(7) Please state the importance of different target groups for your organization

	very important	important	unimportant
1a) agricultural enterprises (corporate farms)			
1b) private farms (family farms) *			
1c) individual farms (household plots) **			
2) scientists/scholars			
3) politicians, administrators			
4) extension experts			
5) processors			
6) consumers			
7) wholesale operators			
8) retailers			
9) students/future experts			
10) other _____			

Remarks: * family farms: registered farms
** household plots: unregistered farms, up to 2 ha, mainly subsistence production

(8) When (year) was your organization/institution founded? _____

For farmers associations and parties, we want to know something about your history.
If it was founded after 1990, has your organization/institution a predecessor in socialist era?

( ) yes ( ) no

If yes, please state the name of the predecessor organization/institution. _____

Do you see your organization/institution in the succession (ideological heir) of an organization/institution that existed before the revolution in 1917?

( ) yes ( ) no

If yes, please state the organization/institution.
_____

(9) What is your yearly budget? _____UAH

(10) **For associations and parties; for other organizations go on with question A (19)**
What are you doing for your members? Please state the importance of services/activities for your organization.

Reasons	very important	important	unimportant
Higher output prices guaranteed			
Lower input prices guaranteed			
Reliable business connection guaranteed			
Lobbying			
Good public relations for agriculture			
Reliable information about markets			
Reliable information about laws and regulations			
Reliable information about new technologies			
Help with questions of law			
Arbitral court			
Extension service free of charge			
Better access to credits			
Better access to donor funded projects			
Other _____			

(11) Do you have offices/representatives in all regions (oblast)?

( ) yes, in all
( ) no, but in some State the number: _____
( ) no, none

(12) Do you have offices/representatives in all districts (rayon)?

( ) yes, in all
( ) no, but in some State the number: _____
( ) no, none

(13) Are all members paying their membership fees in time?

( ) yes ( ) no

If no, what percentage of members is not paying in time? _____ %

(14) Have all potential members joined the organization already?

( ) yes ( ) no

If no, according to your opinion, why did these persons not join, so far? (state up to the three most important ones)

_____
_____
_____

(15) According to your estimate, what percentage of members is actively participating in the "life" of the organization? (e.g. attending regular meetings, participating in workshops/seminars organized by the organization, etc.)

_____ %

(16) How do you evaluate your relation to officials to the Ministry of Agriculture and other state bodies relevant for rural development?

( ) sympathetic, supportive
( ) neutral, not interested
( ) obstructive

(17) How would you describe the decision-making process within your organization?

( ) chairman/president takes the decision without any discussion in the management board
( ) discussion in board, but finally the chairman decides by himself
( ) open discussion in the board with majority vote which is binding for all

If you want to add some remarks about the decision-making process, please use

the following rows?

_____
_____
_____
_____

(18) How do you evaluate the acceptance of your organization among agricultural producers, in general?

( ) low
( ) medium
( ) high
( ) difficult to answer

(19) Please, characterize the ICT infrastructure in your organization/institution according availability, reliability and the competence of your staff in using it.

	Availability *0 : no* *1 : insufficient* *2 : sufficient (every employee has access)*	Reliability *1 : unreliable* *2 : mostly unreliable* *3 : reliable* *4 : very reliable*	Competence in use *0 : nonexistent* *1 : somewhat* *2 : skilled* *3 : professional*
Telephone			
Fax			
Copy machine			
Computer including software			
Printer			
Intranet			
Internet			

B. The organizational structure in Ukrainian agricultural sector

(1) Which organizations/institutions do you see as the most important ones in the agricultural sector of your country?
Please list and rank the five most important organizations/institutions!
1._____
2. _____
3. _____
4. _____
5. _____

(2) In your opinion, which organizations/institutions already working in the agricultural sector in your country, should be more active and what contribution do you expect from them? Expected contributions could be, for instance, financial support, technical support, free services, reliable information.

Organization/institution	Expected contribution
	- - - -
	- - - -

(3) In your opinion, which organizations/institutions not yet active in supporting the agricultural sector of your country should get engaged and what should they contribute?

Organization/institution	Expected contribution
	- - - -
	- - - -
	- - - -

C. Cooperation with other organizations and institutions

This section will look at links between your organization/institution and others. Even though our main interest lies in the agricultural sector, it is also interesting to know if you are cooperating with organizations/institutions outside this sector. Therefore, we will ask you in some questions to specify the sector your partners are working in.

(1) Does your organization/institution cooperate with other organizations/institutions in the non-agricultural sector?

( ) yes ( ) no

If yes, please state five organizations/institutions with which your organization/institution cooperates most in non-agricultural sectors. *Start with the most important organization/institution.*
In which sector is the organization/institution engaged?

Organization/institution	Sector
1.	
2.	
3.	
4.	
5.	

(2) Does the state (government, public administration) assign any jobs or functions in the agricultural sector to your organization/institution?

( ) yes ( ) no

If yes, please specify the type of job and the time period for which it was/is assigned. Think of the last five years!

Job/function	Year of assignment	Ending of contract
1.		
2.		
3.		
4.		
5.		

(3) Does your organization/institution cooperate with other organizations/institutions in the agricultural sector?

( ) yes ( ) no

If yes, please state five organizations/institutions with which your organization/institution cooperates most in agricultural sector. *Start with the most important organization/institution.*

1._____
2. _____

3. _____
4. _____
5. _____

In which activities do you cooperate? How often do these activities take place?

	0: no *1: yes*					Number of activities per year				
Number of organization	1	2	3	4	5	1	2	3	4	5
Type of activity										
Conferences										
Training courses, workshops, discussion rounds										
Fairs										
Training material										
Publishing of books										
Professional journals										
Technical leaflets										
Web site, Internet										
Research Projects										
Other _____										

(4) Does your organization meet regularly with any other organization/institution of the agricultural sector for exchange?
Please consider, for example, meetings, discussion rounds, bilateral exchange with experts, workshops,…

( ) yes ( ) no

If yes, write down the five most important organizations/institutions and mark the frequency of meetings please.

Organization/institution	Frequency of exchange meetings				
	1-2 times a year	several times a year	monthly	weekly	more often
1.					
2.					
3.					
4.					
5.					

(5) Are people in the management board or directorate of your organization/institution also members of the management board of other organizations/institutions in the agricultural sector? Is there any overlapping?

( ) yes ( ) no

If yes, please state the number of persons: _____ persons

Please fill in the following table. *If you don't want to give names, please indicate at least their position in the two organizations*

Name of person *(not necessary)*	Position in your organization/ institution	Name of other organization/ institution	Position in other organization/ institution	This organization/ institution belongs to the agricultural sector *0 : no* *1 : yes*

D. Information and Communication

(1) Which sources of information do you use for getting informed on topics of the agricultural sector? Are these sources national or international? How important are they? What is the quality of these information sources?

Information source	Use *0 : no* *1 : yes*	Source *1 : only national* *2 : international and national* *3 : only international*	Importance *use ranks from* *1 : very unimportant* *2 : unimportant* *3 :neither unimportant nor important* *4 : important* *5 : extremely important*	Quality of source *1 : low* *2 : medium* *3 : high*
Own research				
Books				
Professional journals				
General newspapers				
Agricultural newspapers				
Technical leaflets				
E-mails				
Electronic newsletters				
Web sites				
Electronic discussion fora				
CDs				
Radio				
Television				
Training courses, workshops, discussion rounds				
Fairs				
Conferences				
Farmers				
Experts				
Processors				
Wholesale operators				
Retailers				
Non-official sources (friends, informants)				
Other _____				

(2) Would you like to have more detailed information about the agricultural sector, which is not accessible for you at the moment?

( ) yes ( ) no

If yes, please fill in the table below.

Specify the information that is lacking	Reason for information gap	Possible provider of the information	How should the information be provided?

(3) Which means of communication do you use for external communication to your members, other organizations/ institutions, the public etc.? Who receives this information? Is the information free or do you charge the recipients a fee? How do recipients accept your offer /the respective means of communication? Please fill in the following table.

Means of communication	*Use* *0 : no* *1 : yes* *2 : we would use this mean but we do not have the technical infrastructure* *3 : we would use this mean but the recipients do not have the technical infrastructure*	*Recipient* *1 : farmers* *2 : scientists/ scholars* *3 : politicians, administrators* *4 : extension experts* *5 : processors* *6 : consumers* *7 : wholesale operators* *8 : retailers* *9 : students/ future experts* *10 : other, please specify*	Costs *0 : free* *1 :only for members free* *2 : we charge for members less than for non-members* *3 : for members and non-members equally charged*	Acceptance *1 : low* *2 : medium* *3 : high*
Letters				
Technical leaflets				
Books				
Professional journals				
General Newspapers				
Telephone				
E-mails				
Electronic newsletters				
Web sites				
Electronic discussion fora				
CDs				
Radio				
Television				
General assemblies				
Conferences				
Training courses, Workshops, roundtable discussions				
Fairs				
Personal contacts				
Other				

(4) Does your organization have any means of collecting feedback from your members regarding your information services? What are they? How is this information used?

Used means for collecting feedback	How do you use the information?

(5) If some recipients do not accept the means of communication well, in your eyes, what could be the reasons?

1. _____
2. _____
3. _____
4. _____
5. _____

Please specify for following means of communication the need of improvement

Means of communication	Improvement necessary *0 : no* *1 : yes*
Letters	
Technical leaflets	
Books	
Professional journals	
General Newspapers	
Telephone	
Internet, computer media	
Radio	
Television	
General assemblies	
Conferences	
Training courses, Workshops, roundtable discussions	
Fairs	
Personal contacts	
Other _____	

Are there any means of communication that you do not use at the moment that you would like to use in the future?

( ) yes ( ) no

If yes, please write down which means of communication you would like to use in the future.

1. _____
2. _____
3. _____
4. _____
5. _____

(6) What kind of information do you pass on to actors in the agricultural sector and how is their acceptance?

Type of information	*0 : no* *1 : to members only* *2 : yes to all*	Recipient *1 : farmers* *2 : scientists/ scholars* *3 : politicians, administrators* *4 : extension experts* *5 : processors* *6 : consumers* *7 : wholesale operators* *8 : retailers* *9 : students/ future experts* *10 : other, please specify*	Costs *0 : free* *1 : only for members free* *2 : we charge for members less than for non-members* *3 : for members and non-members equally charged*	Acceptance *1 : low* *2 : medium* *3 : high*
Decision support				
Management issues				
New technologies				
Input prices				
Product prices				
Quality requirements				
Law and regulations with respect to agriculture				
Other				

(7) If some recipients of your information do not accept it well, in your opinion, what could be the reasons?

1. _____
2. _____
3. _____
4. _____
5. _____

(8) In general, where do you see the strengths of your organization with regard to your information and communication policy?

1. _____
2. _____
3. _____
4. _____
5. _____

(9) Did you elaborate an information and/or communication strategy?

( ) yes ( ) no

(10) Is insufficient knowledge of foreign languages a reason for difficulties in information gathering and communication?

( ) yes ( ) no

(11) Where do you see weaknesses of your organization concerning information and communication? Can you give reasons?

1. _____
2. _____
3. _____
4. _____
5. _____

(12) Did your organization/institution get any money from national or international organizations/institutions during the last five years?

( ) yes ( ) no

If yes, please fill in the table below.

Organization/ institution that is the source of money	Sector in which this organization/ institution is engaged	Origin *1 : national 2 : international*	Importance *1 : unimportant 2 : important (less than one quarter of the budget) 3 : very important (up to 50 % of the budget) 4 : vital (more than 50 % of the budget)*	Frequency *1 : only once 2 : irregularly 3 : regularly*

(13) Did your organization/institution pay any money to other organizations/institutions in the last five years?

( ) yes ( ) no

If yes, please fill in the table below.

Organization/ institution (receiving the money)	Sector in which this organization/ institution is engaged	Amount of money (UAH)	Frequency *1 : only once* *2 : irregularly* *3 : regularly*

E. Further remarks of the interviewee
Please indicate the chapter and number of the question!

1. _____
2. _____
3. _____
4. _____
5. _____

Thank you for having taken the time to answer our questions!