



# **Donau Soja Association**Regional office in Ukraine

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Donau Soja Ukraine



Donau Soja



in Donau Soja



Donau Soja

# **ANNUAL REPORT 2018**

# Donau Soja

Regional office in Ukraine

### donausoja.org



# UKRAINE STRATEGIC FARTNER PARTNER

Dear our members, partners and friends,

First of all, on behalf of Donau Soja and European community I would like to thank you for your great contribution to the soya market development in Europe. We have big and important goals for our countries development which can be achieved by strong cooperation and common vision.

As Europe as a whole consumes nearly 40 million tons of soybean equivalent, and the European Union has an import need of 33 million tons, Ukraine as the largest soya producer in Europa has an important strategic role to play. The EU non-GM market is also growing fast and has reached an annual production of 6 million tons.

Potentially, Ukraine can benefit from becoming a preferred partner of EU countries in importing non-GMO soya. To access this high value market, Ukrainian producers need to work hard to fulfil the buyers' requirements in regards to non-GM status, pesticides and sustainability. Donau Soja is ready to work very intensively with Ukrainian producers to upgrade their production and access higher value export markets. So Ukraine is of key importance for our Association.

We would like to reach a position where more than 25% of Ukraine's soya production is certified according to the high Donau soja and Europa soya standards. We would also like to develop domestic value chains including high quality soya feed and food.

We are looking forward to shared success in soya bean production and we invite you to join us.

Best regards, Matthias Krön President of Donau Soja Association







Dear friends, partners and members of the Donau Soja Association,

I would like to thank you all for the past year and for what we have achieved together. We are proud of our common results.

Ukraine has a huge potential for the development of soybean production and processing. And the improvement of the technologies can lead to overall soya production at the level of 6 million tons per year. And this makes Ukraine an important partner for the European Union. Ukraine should become a key partner for the EU in regards to the protein security. In practice, soya is in everyday diet of an EU consumer – in the form of eggs, milk, meat and finished products.

Indeed, there are still many challenges for Ukrainian producers on their way to leadership. Our international team has extensive expertise in agro-technology, quality management, EU requirements for finished products, market trends and marketing. We are open and ready to share this knowledge with you. One of our key goals in Ukraine is to increase the potential for competitiveness and attractiveness of the Ukrainian soya sector. The Donau Soja activities are supported by the Austrian Development Agency (ADA). Donau Soja implements the Strategic Partnership Project "Building sustainable, inclusive and wellfunctioning value chains for non-GM soya and organic soya in Serbia, Bosnia and Herzegovina, Moldova and Ukraine" funded by ADA.

We strive to be the platform for you and the bridge that connects many markets. Our wide network of members, partners throughout Europe gives you the opportunity for successful business development through international and local joint projects, ongoing networking and our willingness to share our expertise with you. We are always open to you.

We, as an association, are as strong, as our partners make us so. Our goals can be reached only through joint efforts. That's why we invite you to support our initiatives and work.

Best regards,

Oksana Prosolenko,

Regional Director of Donau Soja Association in Ukraine









Donau Soja Association was founded in 2012.

The headquarter is in Vienna (Austria). The Association has more than 270 members from all over Europe and is competently represented in local markets by four more offices in Serbia, Romania, Ukraine, Moldova and two representatives in Poland and the Netherlands.

Among our members there are:

- Seed companies
- Producers and distributors of inputs
- Agricultural producers and processors
- Feed producer
- Machinery suppliers
- Laboratories
- Research institutes
- Traders
- Food producers
- Retailers
- Associations, NGOs and politicians

Donau Soja has been operating in Ukraine since 2015, and in 2018 the field office in Kyiv city was officially registered. The Donau Soja Association promotes the cultivation of soya in Europe, mainly by developing Donau soja and Europe soya standards. These standards contribute to the development of sustainable production of non-GM soybeans for the supply to local markets of the EU countries. The Donau Soja Association joints the Danube region countries with new economic perspectives, offering economic opportunities and incentives for all European countries and helps member companies with fast-changing markets, especially in the context of growing demand for more sustainable European protein supplies. Consumers benefit from work in the field of certified, sustainable, non-GM local soya production.

# MISSION

Donau Soja Association promotes sustainable European protein supplies.

Donau Soja Association supports its members and partners in promoting and managing changes in the European value chains in agriculture and the food industry to address current and future social, environmental and economic issues and to better meet public expectations.

The Association supports soybean production in Europe, as well as other measures, such as more sustainable consumption, more efficient use of protein in feeding animals and producing other legumes in Europe. This contributes to more sustainable approaches to the production and use of vegetable protein, regional economic development, the preservation of natural resources, environmental protection and economic integration in Europe.

Donau Soja pursues this, in particular, by setting and promoting quality standards based on the rules for the production and processing of crops used in the European Union, as well as on additional sustainability criteria. This responds to growing consumer demand in more sustainable, non-GM, regional, and traceable value chains.

Donau Soja seeks to support all participants in the value chain, from the development of public policy fundamentals, scientists, farmers and processors, to food marketing.



### INTERNATIONAL PROJECTS

Donau Soja takes a leading role in promoting cooperation between China and Europe in the development of protein cultures. Since November 9, 2015, the Memorandum of Cooperation of the Association with leading Chinese agricultural institutions has been in force.

### Collaboration includes:

- creation of the European-Chinese Council on Protein Cultures and Products
- promoting science exchange between China and Europe
- development of new common approaches tomarket challenges.
- In the framework of IoF 2020 (Internet Food and Farms 2020), Donau Soja contributes through the development of a scenario for the use of soybeans.
- The Legumes Translated project aims to synthesize and disseminate knowledge for the production and use of protein crops in Europe. Under the leadership of Thünen-Institute and the Association, a consortium of 18 partners and 15 practitioners develop best practices and web solutions for European farmers and companies.



# MAIN CRITERIA OF DONAU SOJA AND EUROPE SOYA STANDARDS

- Regionality (control of origin)
- Non-GM (according Germ an VLOG, Austrian ARGE, Non-GMO Danube Region Standard or equivalent)
- Educed pesticide use, since the EU legislation is basic even for non-EU countries at the moment, such as Ukraine, Russia, Serbia which produce more than 50% of soya in Europe
- Ban on desiccation (e.g. glyphosate) and aerial pesticide spraying
- Ban on use of chemicals listed in the Stockholm and Rotterdam conventions
- No land use change / deforestation, cultivation only only on lands dedicated to agricultural use since 2008
- International social and labor rights: compliance with the relevant ILO convention
- Certification is carried out by independent certification bodies and supervisory inspections of the Donau Soja
- Certification is based on traceability system.

# DONAU SOJA ENJOYS WIDESPREAD POLITICAL SUPPORT

### **DONAU SOJA DECLARATION**

15 Ministers and State Secretaries from 14 countries have supported the Association's objectives by signing the Donau Soja Declaration.

### **EUROPE SOYA DECLARATION**

19 EU agriculture ministers, including those of Italy, France, the Netherlands, Austria, Romania, Finland, and Switzerland signed the declaration – a joint accomplishment of the Donau Soja Association and the agriculture ministers.





### **AIMS**

The Donau Soja Association seeks to support the sustainable development of the European agrarian and food business by improving the production and use of protein for European consumers. Most important aim of Association is the support of soybean cultivation in accordance with clearly defined quality standards. This includes:

Support for growing sustainable soya in Europe in line with the EU farm requirements and Donau soja and Europe soya standards

- Establishing value chains with members of the Association, contributing the European protein supply
- Support for research and innovation activities that contribute to the development of European soybean production
- Development and implementation of Donau soja and Europe soya standards

It is the cornerstone of supporting sustainable regional production for non-GMO soybeans for European value chains.

Donau soja and Europe soya standards:

- Give consumers the confidence that the products were produced using soybeans grown in accordance with the criteria of sustainiable production and have European origin
- Allow companies that would like to become the pioneers of the implementation of the regional, non-GMO feed production maintaining the development of value chain
- Make a significant contribution to the integration of the Danube region, providing economic incentives and opportunities for the countries of the Danube region
- Play a leading role in the European non-GM protein supply
- Allow enterprises to meet the demand for food and feed in accordance with the criteria of sustainable production, which gives them a clear competitive advantage

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The Donau Soja Association activities are supported by Austrian Development Agency (ADA). Currently Donau Soja is implementing the Strategic Partnership Project "Building sustainable, inclusive and wellfunctioning value chains for non-GM soya and organic soya in Serbia, Bosnia and Herzegovina, Moldova and Ukraine" funded by ADA over a period of 5 years (2017-2021).

WITH FUNDING FROM



The Strategic Partnership Project goal is to build sustainable, inclusive and well-functioning value chains for non-GM soya and organic soya in Serbia, Bosnia and Herzegovina, Moldova and Ukraine until 2021.

By implementing this Strategic Partnership Project, the competitiveness of agricultural producers, processors (e.g. oil mills) and the food and feed industry will be enhanced and the access to domestic, regional and international markets will be improved. It is planned that by the end of the year 2021, 152,000 tons of soya will be certified by the four target countries.

The target group includes soya producers, collectors, processing plants (such as oil mills), feed producers and traders, and finally food producers (label users). In addition, input providers, public extension service providers, farmers` associations, agriculture and research institutes, certification and control bodies, ministries of agriculture and food safety agencies will benefit from capacity building activities. The indirect target group comprises all participants along the value chain where agricultural workers as well as consumers – in the four countries but also in EU and other non-EU-countries – will benefit from the planned activities.

The following activities are being conducted in order to systematically develop the soya markets in the 4 countries:

- trainings for producers to share knowledge and best practices in soya cultivation and processing
- capacity development of extension services
- the introduction of the Donau Soja quality system and labelling scheme
- the promotion of organic cultivation, market development and trade facilitation
- improvements of the business environment to favour soya production, processing, trade and use
- promotion of European standards in agricultural production



## DONAU SOJA GENERAL ASSEMBLY (VIENNA, AUSTRIA)

On April 19, 2018 the Donau Soja Annual General Assembly succesfully took place.

Within the General Assembly the networking event for all stakeholders (members and partners) was organised. During this event all the participants were able to get acquainted with European buyers, international experts, exchange knowledge and expand their network of contacts.

## V INTERNATIONAL DONAU SOJA CONGRESS 2018 (SCHWÄBISCH HALL, GERMANY)

On June 19-20, 2018 the Donau Soja Association organised the V International Donau Soja Congress "The Protein Transition in Progress: Sustainable, Regional and Non-GMO Soya in Europe"

The Congress was dedicated to the challenges and opportunities of an independent and sustainable European protein supply and its economic, ecologic and social implications, as well as the important business opportunities for farmers, processors as well as users of European Non-GMO food and feed.

The Congress 2018 also included the II Europe-China Soya Symposium, which focused on developing a joint China-Europe strategy for a global, sustainable and GMO-free soybean production.



### DONAU SOJA NETWORKING EVENT AT THE XIII INTERNATIONAL DANUBE EXCHANGE

On September 7, 2018 the Donau Soja Association took part in the XIII International Danube Exchange – meeting place for the feed and grain industry with participants from 24 countries.

Within this event the Donau Soja Association organised a networking event with expert presentations to discuss latest market developments and trends.



OUR INTERNATIONAL EVENTS

### **OUR TEAM IN UKRAINE**







We see that after the development of the domestic agro-industrial complex there is farmer desire to follow global trends in sustainable production, which confirmed by the increase in the number of companies certified by the Donau Soja standards. At the end of the year, 4.3% of soybean areas in Ukraine were certified.

Further support of this positive trend is possible through the use of high quality seeds, application of the best sustainable technologies and practices, risk management, and GMO contamination control.

Joint, persistent work and the growing demand for sustainable agrarian production will help national companies to take their place in the pantheon of the best global producers.

Volodymyr Pugachov, Quality Manager Ukraine is among the ten world producers of soybean, and has a leading position in the European production with significant potential for further increase of production and domestic consumption. Ukraine is able to become a key partner in non-GM protein supply in the EU – it is obvious.

We pay great attention to the synergy of all market players, and the Donau Soja Association plays a role of a so-called bridge between Ukraine and the EU countries.

The Association provides the Ukrainian companies with the complete support in promoting their products on the EU market. Also we are active in value chain development on the local market and cooperation with the European partners.

Olga Shpachuk, Market Development Manager





The soybeans were introduced to the Central Europe in 1878. It was 140 years ago, but for Ukrainian soybean producers the soybean is a new crop in terms of growing technologies. The demand for non-GM certified soybeans is growing every year. Ukrainian farmers have great potential according to the area increase, yield growth and implementation of the efficient agricultural technologies what allow them to confidently compete in the European market.

The Donau Soja Association activities are aimed at increasing the technological and agronomic knowledge of the farmers.

Together with our partners we provide the farmers with the information about the technologies and best practices of effective conventional and organic soybean production.

Anastasiia Radiuk, Agro Projects Manager The country's reputation on the international market directly depends on each market player. While communicating with our partners from the EU countries, we have noted increasing importance of well business reputation and building long-term cooperation. Important aspects of the reputation are transparent and traceable activities at all business stages, openness of the company's management and their partners' trust in them. The status of "reliable partner" is a significant competitive advantage.

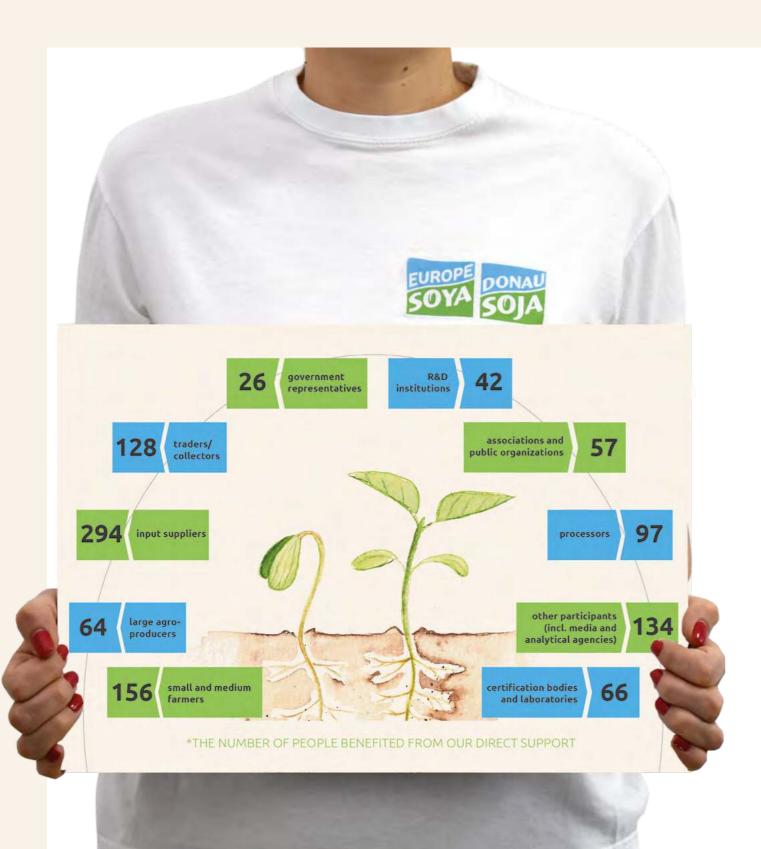
We help our members to get this status by promoting them on the market through joint projects and our strong brands. Thus, we contribute to the strengthening and development of the Ukrainian producer's reputation on the EU markets.

Anastasiia Pivniuk, Communication Manager









companies' representatives

1 064

received support from our team through:

- trainings, seminars, study programs
- field days
- participation in our events
- business meetings and consultations

### ENVIRONMENTAL PROTECTION

- decreasing of carbon footprint level in the transportation of soybeans and soya processed products by applying short supply chains
- reducing use of pesticides by trainings on rational use of agro-technologies and implementation of Donau Soja standards requirements
- deforestation monitoring (cultivation only on areas designated for agricultural use until 01.01.2008)

people were trained 189

We pay great attention to educational projects. These projects are aimed at improving the professional knowledge in the field of traditional and organic agro technologies, quality management, work with the Donau soja and Europe soya standards

women were trained

38

men were trained

151

Strategic Partnership Project funded by ADA will result in long-lasting improvements, and range from the general improvement of the situation of agricultural producers to their integration into high-value markets and the generation of value from domestic processing.

We pay special attention to cooperation with small and medium farmers.

156

small and medium farmers received our support

Compliance with laws and human rights:

- participation in improvement the regulation of GMO turnover and control over it
- Donau Soja pays special attention to working with partners on the issues concerning human rights respect

### **GENDER POLICY**

In our work we pay great attention to gender policy

32%

339 women received our support

68%

725 men received our support

In our further activities we will apply the principles:

- at least 15% of women will take part and partcipate as speakers in our events
- organization of special trainings for women working in agro business
- pay special attention to women as opinion leaders during events





The Donau Soja Association takes an active part in the **development of the regulatory framework** of Ukraine, and is aimed at creating **favorable conditions for agribusiness**, including **organic** production, expanding geography and spectrum of **foreign trade** operations and creating an **effective system for regulating** GMO turnover in Ukraine.

Together with our partners we comprehensively participate in the development of the local market, as well as improve the sectoral and export competitiveness of Ukrainian production and processing of soybeans.



WITH FUNDING FROM AUSTRIAN DEVELOPMENT COOPERATION

Working group on the development of organic production and niche crops





Working Group on the use of genetically modified organisms

We are a permanent member of the Committee of Entrepreneurs of the Industrial-Industrial Complex of the Chamber of Commerce and Industry of Ukraine and jointly work on the development of export and bilateral trade





We closely work with the State Service of Ukraine for Food Safety and Consumer Protection on legislative regulation of the GMO turnover, regulating the use of seeds, and protecting the rights to plant varieties

We cooperate with the Austrian Embassy in Ukraine on the development of business relations between our countries and at the level of the European Union











### MEDIA ABOUT US

print media

online information resources

>58 000

online views and print runs

>64 000

people have read news about us on Facebook

## EVENTS

events of agricultural sector in which we participated

>6 500

people engaged

joint partner events



The Donau Soja Asscociation with support from the clue associations, public organizations, representatives of Ukrainian business and government organized the Press Conference "48% of soya grown on Ukrainian fields is genetically modified" (02.11.2018, Kyiv)

### **Discussed topics:**

48% of GM illegally grown in Ukraine soya

**GMO** on Ukrainian in food shop shelves products

of GMO Legal problem and aspects ways to solve it

of non-GM **Prospects** production

### **COMMUNICATION GOALS**

- Informing Ukrainian consumers and producers of soya market
- Organization of discussions on GMO turnover in Ukraine
- Providing expert's opinion on export prospects for Ukrainian companies and quality requirements for export to the EU
- Sharing recommendations on effective soya cultivation technologies
- Promoting interests of Donau Soja members

### MEDIA PARTNERS



TOP

LEAD















**ДУкрАгроКонсалт** 







### **EXPORT CAPACITY-BUILDING**

international networking events

Projects organized by the head office (Vienna, Austria), where the Donau Soja Ukraine regional office also took part

> XIII International Danube Exchange (07.09.2018, Vienna, Austria)

V International Donau Soja Congress 2018 (19-20.06.2018, Schwabisch Hall, Germany)

> Donau Soja General Assembly 2018 (19.04.2018, Vienna, Austria)

### MARKET ANALYTICS

We are experts and providers of exclusive market analytics on production and market prices in the non-GM soybean sector



### **DONAU SOJA MEMBERS**



GLENCORE

EURALÎS

( DANUBEAGRO



























partners and friends in Ukraine

Ukrainian companies visited international 9 networking events in Europe



### DOMESTIC MARKET DEVELOPMENT

media partners

participated as speakers in conferences, forums, round tables

media publications

### Advertising and marketing communication policy on the following topics:

- Domestic soybean processing development
- Production capacity of Ukraine
- Opportunities in non-GM market

### **CONSUMER SURVEY**

National survey on public opinion of Ukrainian consumers on GMO in food (December 2018)





total number of European members

Ukrainian companies

international members that have representative offices in Ukraine









The Donau Soja Association supports the principles of sustainable agriculture which is important for the preservation of the environment and well-being of future generations. A balanced consideration of economic, social and environmental aspects, which the Association is guided by, will allow Ukraine to get maximum profits in agricultural production now and in the future.

Mykola Bykov, Consultant on Agronomic Technologies and Organic Production of Agricultural Extension Service "Agroargument"





I believe that Ukraine and Ukrainian producers can play a strategically important and key role on the European plant protein market basing on production, geography, soil quality and development factors.

The Donau Soja activities are aimed at contributing to the present, future, informed rational choice for next generations.

All together this is a powerful synergy of business, science, state policy and European integration process for a conscious present and future of the agricultural industry, environmental management and consumer values.

Inna Meteleva, Former Board Member of Donau Soja Association (2016-2018), Country Director Ukraine Charterhouse Corporate Partners (UK)



As part of the fulfillment of the obligations undertaken by Ukraine after signing of the Association Agreement with the EU, there is an appeared necessity to regulate the procedure for GMO turnover in Ukraine, as well as to eliminate the gaps in national legislation in order to harmonize it with the requirements of the European Union.

Arzinger Law Firm and the Donau Soja Association are engaged in fruitful cooperation in order to improve and finalize several draft laws aimed at resolving the issues of GMO turnover in Ukraine.

Arzinger's experience of many years in the agrarian sector helps to incorporate and implement in the draft laws the opinion of market players so that the adoption of the draft laws will not be a mere formality, but effectively put into practice.

Oleksandr Plotnikov, Partner of Arzinger Law Firm







Soya is a crop that confidently entered the structure of crop production in Ukraine. In less than two decades, soybeans have occupied a significant niche both in the raw material market and in the alternative food market. In Ukraine, traditionally, several scientific institutions are engaged in the breeding of soybeans and Ukrainian soya varieties are being grown in some European countries. But in recent years, thanks to the collaboration with colleagues from the EU, new varieties of different groups of ripeness have appeared in Ukraine, and therefore a comparative study of varieties – biology, plant morphology, nutritional value of legumes, and the development of adaptive cultivation technologies – is an important component of cooperation among scientists and producers of Ukraine and other European countries.

Svitlana Kalenska, Head of Department of Plant Industry, Doctor of Agricultural Sciences, Professor at National University of Life and Environmental Sciences of Ukraine, Corresponding Member of NAAS of Ukraine



Donau Soja Association is a great initiative to help all non-GM soybean ecosystem members to cooperate basing on same principles and shared values.

Agritema company is also promoting non-GM and sustainable crop management with the help of biological and microbial products for seeds and it is in our common interest to support such organizations as the Donau Soja Association.

As a member of the AgriFood Education Institution, I highly appreciate the huge efforts of Donau Soja in organizing trainings and educational workshops for farmers in order to help them to learn more about non-GM soya cultivation.

Nataliia Gordiichuk, Founder and General Director of Agritema LLC, Head of AgriFood MBA of Kyiv-Mohyla Business School







Considerable advantages of the Donau Soja representatives in Ukraine are the right posing of the question and professional approach in solving difficult issues which can lead to the development of the domestic market. These two factors can give an impulse to export capacity-building.

Viktor Timchenko, President of Ukrainian Association of Soybean Producers and Processors

22







companies and farmers took part 3 600







Joint exposition on soya cultivation technologies within the framework of the International Field Days Ukraine (20-22.06.2018, Kyiv region)



### FARMERS' EDUCATION

farmers passed the Donau Soja study program





soya trial plots

### OUR PARTNERS





































The comparative analysis of the pesticides list for soya cultivation in CIS countries, with similar constantly undertaken

### INTERNATIONAL PROJECTS

- Trial plots of Ukrainian soya varieties of the Institute of Feed and Agriculture of Podillia NAAS and Arnika agro-industrial group at 3 locations in the southern Germany were planted
- Donau Soja coordinates a bilateral project between the EU and the PRC on the exchange of soybean varieties. Ukraine is a country participant of this project
- Experience exchange within the framework of the Donau Soja field days in European countries

### **Best Practice Manual** on non-GM soybean production

The best agricultural practices for growing soya in the Danube region are collected it the manual. It is elaborated by the European agricultural experts











agro-industrial companies certified in Ukraine

10

Donau Soja continuously conducts trainings for certification authorities and market players.

Collaboration with laboratories for GMO and pesticide analysis

processing plants certified in Ukraine, Russia and Belarus

3

### **CERTIFIED PARTNERS**

















250 000 tones of soya harvest 2018

sown areas for soybeans in Ukraine are certified by Donau soja and Europe soya standards

A comprehensive analysis of production risk factors across countries is carried out on an ongoing basis, for example, the risk of GMO contamination

30

elevators certified in Ukraine and Russia



### **CERTIFICATION BODIES**

Inspection and certificate issuance:





aciter

Only inspection:









# Dear Partners,

On behalf of the Donau Soja Association, we would like to express to you our highest respect and gratitude for our fruitful cooperation in 2018. We strongly hope that 2019 will be successful for our partnership as well. We look to the future with great optimism!

We have an honor to invite you to join the Donau Soja Association and the European business community that develop non-GM soya sector.

As an association, we are as strong as our members make us so. Our goals can only be achieved together with you. Therefore, we invite you to be an active member and let us know about your needs, and also support our efforts.

### Your benefits as a member of Donau Soja:

- Regular updates about the international Donau Soja network and its activities via our newsletters and meetings
- Joint lobbying of national, regional and EU governments for improved conditions for soya growing, processing and usage
- Network exchange between Donau Soja members during our regular meetings and B2B events, and facilitation in establishing contacts between Donau Soja members with potential buyers and partners
- Information regarding potential partners and customers in Europe and beyond
- Representation through Donau Soja at various international events
- Participation in the International Donau Soja Congress, Donau Soja conferences, B2B meetings and other events
- Representation by Donau Soja representatives in media
- Involvement in decision making processes of Donau Soja related issues
- Access to market information, professional advice and statistics update on a regular basis and market report representing the current soya market
- Participation in research related to breeding and growing soybeans and involvement in the field days
- Consultation on implementing the Donau soja and Europe soya standards and related quality and food safety issues
- Use of the trademarks «Donau soja» and «Europe soya» in cases with a specific contract or under our general guidelines

Become a leader in the protein changeover!

Kind regards and looking forward to further cooperation, Donau Soja Team







### Headquarter Austria (Vienna)

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Matthias Krön, Chairman, General Manager

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The field office is responsible for the following countries: Croatia, Serbia, Bosnia and Herzegovina, Hungary, Slovenia

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21000 Novi Sad

Marija Kalentic, Regional Director (Central & Eastern Europe), Head of Novi Sad Office

kalentic@donausoja.org

### Office Ukraine (Kyiv)

The field office is responsible for Ukraine

1/10 Bankova street, office 33

01024 Kyiv

Oksana Prosolenko, Country Director (Ukraine, Russia, Belorus)

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The field office is responsible for Moldova

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Viorel Gherciu, Country Director

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Dragos Dima, Representative Romania and Bulgaria

dima@donausoja.org