



OECD Eurasia Webinars

Supporting Recovery and Enhancing Resilience

Summary Record

27 May – 25 June 2020



Table of Contents

Helping SMEs to weather the Covid-19 crisis in the Eastern Partner countries	3
Speakers	3
Supporting Private-Sector Recovery in Central Asia Regional Webinar	9
OECD Eurasia Competitiveness Roundtable	14
Promoting Exports and Supply-Chain linkages in the Food industry Snapshot of Moldova	15
SME Strategies for 2021 and Beyond. Snapshot of Ukraine	18
Snapshot of Kyrgyzstan	21
Effective Support Services for SME Competitiveness Snapshot of Belarus	24
Annex: List of Participants	27
Supporting Private-Sector Recovery in Central Asia <i>Registered participants (by country – excluding OECD Secretariat)</i>	32

Helping SMEs to weather the Covid-19 crisis in the Eastern Partner countries¹

27 May 2020

While it is difficult to estimate the magnitude of the effect of the COVID-19 crisis on Eastern Partner (EaP) economies, it is clear that a sharp contraction in domestic output, household spending and international trade will have a significant impact on small and medium-sized enterprises (SMEs). This webinar provided a platform for policymakers from the Eastern Partner countries to discuss their responses to the crisis, including in particular support for SMEs, and to reflect on medium- and long-term policy priorities to recover from the crisis.

Speakers

In order of appearance:

- **Mr Andreas Schaal**, Director of OECD Global Relations
- **Mr Mathieu Bousquet**, Head of Unit NEAR C1, Neighbourhood East, European Commission
- **Mr William Tompson**, Head of OECD Eurasia Division
- **Ms Ekaterine Mikabadze**, First Deputy Minister of Economy and Sustainable Development, Georgia
- **Ms Naira Margaryan**, Deputy Minister of Economy, Armenia
- **Mr Rovshan Najaf**, Deputy Minister of Economy, Azerbaijan
- **Mr Dmitry Yaroshevich**, Deputy Minister of Economy, Belarus
- **Ms Lilia Palii**, State Secretary, Ministry of Economy and Infrastructure, Moldova
- **Mr Dmytro Romanovych**, Deputy Minister for Development of Economy, Trade and Agriculture, Ukraine

Opening remarks

Andreas Schaal, Director of OECD Global Relations and Mathieu Bousquet, Head of Unit NEAR C1, Neighbourhood East, European Commission

- **All economies of the Eastern Partnership (EaP) region are expected to contract in 2020:** rising unemployment, debt and public deficits. The [OECD](#) estimates that every month of lockdown causes an estimated 2 percentage point fall in annual GDP. Both domestic and external demand will suffer severe drops, due to reduced remittances and trade. Many otherwise viable firms may face insolvency due to the lack of liquidity.
- **Structural policies to support the recovery must be aligned with longer-term goals.**
 - The evidence suggests economic impact of the crisis will fall disproportionately on vulnerable groups, making renewed commitment to more inclusive growth a priority. The [SME Policy Index for Eastern Partner Countries 2020](#) provides recommendations for promoting inclusion via better policies to support entrepreneurs and small firms.
 - The EU published [a joint communication on the Eastern Partnership](#) on 18 March, focusing on resilience as a key concept going forward. Co-operation between EU member states and Eastern Partner countries beyond 2020 will address long-term objectives, such as the rule of law, security, environmental and climate change issues, digital transformation, inclusive societies. Moreover, the EU [responded quickly to support EaP countries during the Covid-19 crisis](#): it has mobilised €80 million to cover the most immediate needs, followed by an additional emergency support package of up to €883 million to support the social and economic recovery of the region through SME support programmes, credit lines and grants to SMEs as well as through the EU's major de-risking instrument, the European Fund for Sustainable Development.
 - Policies to support the recovery offer an opportunity not merely to rebuild what was there before the crisis but to **build better policies, institutions and growth models, learning from the past** and working to **reconstruct**

¹ This project is implemented with the financial support of the European Union within the EU4Business initiative. EU4Business is an EU initiative that helps SMEs in the six countries of the Eastern Partnership region to realise their full potential and boost economic growth.

a **greener, fairer economy**, with greater attention to risk management. This will require greater solidarity, co-ordination and collective response. The OECD stands ready to support this process with knowledge, help and advice, fostering the exchange of good practices and continuing the **close co-operation** between the EU and the OECD within the OECD Eurasia Competitiveness Programme.

Panel discussion: how to support SMEs to weather the crisis

Overview of the state of the pandemic and of the policy responses in EaP countries

OECD Secretariat

- **Current state of Covid-19 pandemic in EaP:** first cases reported in mid-late February, quick policy responses from EaP countries, with containment measures as early as mid-March. This approach seems to have paid off, as **the public health impact appears to have been less severe than in Western Europe**. Governments have begun to relax confinement measures, but the unprecedented containment efforts took a toll on all EaP economies through both demand and supply shocks – with an estimated fall in output ranging **between 20% and 30%** across the region during the period of their strictest application. In the short-term, businesses and households suffered from an instant drop in revenues due to reduced sales. Businesses also face liquidity shortages – according to recent estimates, without government support, about one-third of European firms will face severe liquidity shortfalls. EaP countries face rising unemployment, loss of productive capacity, and potentially long-term declines in output/market share.
- **Policy responses** can be divided into three blocs: monetary policy, support to individuals and households, and support to businesses. The announced overall support packages of EaP countries range from **1.6% to 6.3% of GDP**, excluding healthcare measures (e.g. VAT support for medical equipment). The magnitude of the fiscal response is **comparable to measures put in place elsewhere**. The most popular measures so far are those supporting employees/wages, which all countries implemented, albeit with different degrees of coverage and intensity. The picture is more varied regarding tax deferrals/relief.

Country responses during the lockdown phase – country focus

GEORGIA (First Deputy Minister of Economy and Sustainable Development Ekaterine Mikabadze)

Georgia remains committed to hosting OECD Eurasia Week in mid- to late 2021, and to continuing its support for regional policy dialogue and partnership across the region.

Focus on the tourism sector:

- Context: tourism is one of the fastest-growing sectors in the country, also playing an important role in the social life of Georgian citizens. It has become the largest component of service exports (70%), in parallel with the rapid development of the hotels, restaurants and catering sector. The share of tourism in GDP reached **20% in 2019**, with 8% growth in international visitors. Tourism suffered from a sharp shock during the pandemic, with a significant reduction in employment. SMEs with less than GEL 20 million turnover account for the majority of the hotel industry.
- Response: **measures targeted at tourism** include full exemption of property taxes, delay of income tax for 9 months, 80% loan subsidies for six months, and support packages under the “Produce in Georgia” programme. Restaurants are now eligible to participate in a credit guarantee scheme to help overcome liquidity shortages.
- Way forward: to ensure a fast recovery, the government aims to facilitate the participation of tourism service providers in international fairs, as soon as they become available, develop tourism products and services that could be needed after the crisis (medical services/wellness, wine and eco-tourism). Georgia sees **significant opportunities for tourism recovery and rapid reopening** with high safety standards. Georgia could position itself as a safe tourist destination given its epidemiological situation. On the supply side, to prevent tourists from bringing the pandemic to Georgia, arrangements are being planned for **green corridors** with partners from areas with low numbers of infections.

ARMENIA (Deputy Minister of Economy Naira Margaryan)

Focus on liquidity risk management:

- Compared to other EaP countries, Armenia has implemented fewer measures in terms of quantity, but those implemented are very carefully targeted, e.g. **liquidity measures** to help SMEs pay salaries. Additional measures include interest-rate subsidies on loans that banks agreed on granting to SMEs; loans provided through banks to SMEs with limited revenues but financed by State support depends in some cases on an enterprise’s 2019 data (credit history, tax history, type of industry – tourism, entertainment, education, manufacturing, construction). The loans provide liquidity support over a six-

month period. Thanks to the subsidies, entrepreneurs will be able to benefit from 0-interest, two-year loans. A range of subsidies also exists for innovative agriculture.

- **Bank incentives** are often overlooked – yet they should be taken into account if banks are used to reach firms in need of help. Otherwise, the banks may administer support programmes in ways that reduce their own risks but do not channel help where it is most needed. Armenia designed **three formats, among which banks can choose**: 1) the bank takes on all risk and the state subsidises the loan; 2) if the risk is too great for the bank to bear, the state shares the risk and co-finances the loan; and 3) if the bank takes the risk but lacks the resources, the state finances.

AZERBAIJAN (Deputy Minister of Economy Rovshan Najaf)

Focus on tax measures (deferrals, holidays, amendments to tax code):

- Response: **For all sectors**, the government has offered exemption from property tax, 50% exemption from corporate income tax, deferrals of tax payments, and a zero VAT rate on food and medical products. The legal act has passed three rounds of discussion with the parliament and is expected to be approved soon.
- Way forward: The strategic view is to **change the growth model** to support job creation and sustain income and SMEs. Investments have increased to **foster digitalisation** and a **more flexible tax administration** based on innovative solutions. The authorities must work to strengthen mutual trust between the state and businesses, develop medium-term measures to maintain the pace of economic growth and expand the domestic demand. Businesses have to increase their efficiency and competitiveness in the post-pandemic world. SME support policies will focus on **developing access to finance and technology**, and enhancing government to business and B2B services.

BELARUS (Deputy Minister of Economy Dmitry Yaroshevich)

Focus on sectoral responses:

- Several packages are foreseen: analyses were conducted to identify the **most affected sectors** (food sector, entertainment, services). Measures will focus on giving local authorities the right to **reduce tax rates** for those sectors and providing support to enterprises in all areas of the economy, e.g. through **wage subsidies**. Different **social measures** are also foreseen, e.g. for families with many children. Additional measures foreseen include **credit guarantees** – although the public administration is having trouble in signing contracts and other documentation remotely. The **central bank** plays a major role in the fight against the crisis and has already taken several measures (e.g. reduced interest rates to support lending) and providing liquidity to companies.

MOLDOVA (State Secretary of the Ministry of Economy and Infrastructure Lilia Palii)

Focus on support measures to SMEs and sole entrepreneurs:

- **Main measures** include the **postponement** of declaration and payment of income taxes for 2019, **reduction of VAT** from 20% to 15%, a programme offering VAT taxpayers the right to get a VAT **refund** for a certain period, suspension of audit obligation of financial statements for 2019 for some enterprises, introduction of **payroll subsidies**. Patent holders (people who practice independent activities) who had to cease their activities receive a patent tax exemption, social contributions refund and a one-off unemployment benefit. In addition, the **Interest Grant Subsidy programme** will provide monthly interest rate subsidies on loans from May to December 2020. The National Commission for Financial Markets introduced measures regarding insurance. The national legal framework was adapted with provisions on remote and part-time work. Other programmes continue: Women in Business, PARE 1+1. A state guarantee scheme is under discussion with the SME support agency ODIMM.
- To support business activities and sales in the pandemic situation, **several initiatives were launched**: an e-commerce programme with ODIMM, a virtual academy for entrepreneurs with the support of the EU, and an SME digitalisation programme approved with ODIMM to access business development services and small-scale technology investments. Moldova also plans to launch an early warning mechanism based on EU practice.

UKRAINE (Deputy Minister for Development of Economy, Trade and Agriculture Dmytro Romanovych)

Focus on tax measures and liquidity support:

Ukraine adopted measures similar to what other countries have presented.

- **Tax measures** were adopted in mid-March: unified tax contribution, temporary cancellation of fines for violation of tax regulation, temporary suspension of real estate tax on non-residential properties and postponement of personal income tax declaration. Like Moldova, Ukraine introduced a temporary moratorium on tax and audit inspections and audits during

lockdown and a few months after. Rent for businesses and property were adapted (rent relief for the duration of the lockdown); tax exclusion for the time during which the property could not be used.

- **Liquidity and financial support:** the National Bank reacted quickly by **reducing the refinancing rate**. At the beginning of the year, Ukraine started the **programme “Affordable loans at 5-7-9%”** for SMEs, which was then adapted to the crisis, making it available for the refinancing of existing loans, to assist businesses in covering the cost of payroll, ease the access to finance for investment, etc. SMEs can apply for partial unemployment benefits for the lockdown period; although the help is limited to the minimum wage, there is a huge demand from businesses. There are also a number of **targeted support measures for individual entrepreneurs**, e.g. assistance for every child under 10.
- Finally, many measures and programmes started to advance the **digitalisation of government services** (e.g. application for unemployment benefits and child benefits for instance).

Key features of effective policy responses and policy considerations for medium/long-term SME policy

Relevant measures used by OECD member states include:

- **Tax deferrals and relief** (as most EaP countries did) – which can be targeted, as in Poland.
- **Loan guarantees**, which represent the largest share of the help provided. Help SMEs access loans they would not have accessed usually, e.g. loans up to GBP 15 000 in the UK.
- **Short-time work schemes** (e.g. Germany’s Kurzarbeit programme) proved to be very effective following the 2008-09 global financial crisis. They can be made conditional to a loss of revenues for instance.
- **Unemployment benefits/income support**, e.g. in Italy.
- **Helping workers in the informal economy**

Policy considerations to support the long-term resilience and recovery:

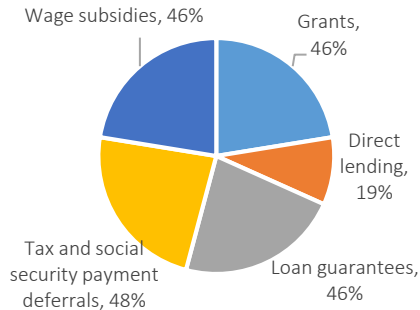
- support **low-carbon transition**, e.g. by making support schemes condition on environmental performance;
- accelerate **digitalisation**, notably for SMEs to access e-commerce;
- improve **connectivity**; and most importantly,
- continue implementing **structural reforms** to make markets and governments work more efficiently, and continue improving institutional and regulatory framework for SMEs.

Open discussion

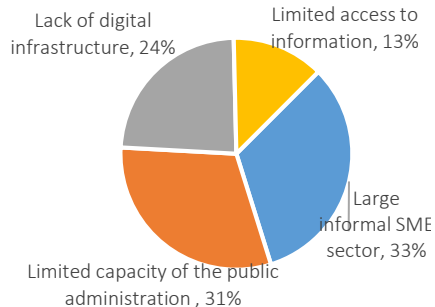
Poll results

Key points: very balanced positive opinion on preferred policy instruments to help SMEs, except for direct lending which has been by far the least liked; the large informal sector and limited capacity of the publication administration are seen as the two biggest challenges for delivering SME support; and almost half of the respondents consider digitalisation as the most promising avenue going forward to promote SME resilience and competitiveness.

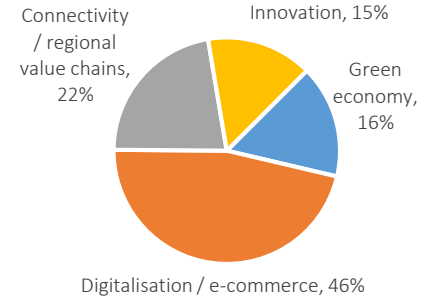
What policy instruments are the most appropriate to help SMEs whether the Covid-19 crisis? (chose two)



What is the biggest challenge in quickly delivering effective SME support?



Following the crisis, what is the most promising avenue for promoting SME resilience and competitiveness?



Q&A session

Sectors where you foresee a need for more long-term support even after the pandemic is over?

- Tourism and hospitality, hotels, restaurants and catering, textiles (Armenia), creative industries (Moldova, Ukraine), transport and logistics (Azerbaijan, Moldova), events and entertainment (Azerbaijan).
- Ukraine plans to focus on horizontal measures more than on industries, working on access to public procurement for SMEs, export promotion for SMEs, access to markets, access to finance. Moldova orients its efforts towards SME digitalisation and sustainable growth.

What policies are being considered in response to the thousands of return migrants (both skilled and non-skilled), notably in Armenia, Ukraine and Moldova?

- Equip migrants both with skills to be re-employed and to start their own business e.g. PARE 1+1 in Moldova. Armenia is negotiating matching grants with the EU. In Ukraine, targeted approaches for energy efficiency and job creation in different industries and affordable lending exist and a specific plan for the economy and job creation is under discussion.

How can the EU help to accelerate SME digitalisation in EaP countries?

- Digital transformation is one of the EU's five long-term policy objectives for EaP. The EU is working with the EBRD to provide advice to SMEs, plans €5 million to support SME digitalisation. Beyond technical assistance, technology should be used to transform the way businesses are managed.

How will the OECD help supporting SMEs' transition to a green economy?

- The OECD is an economic organisation, not a financial one. It tracks closely what is happening in the countries, assess the impact of the measures, and provides recommendations on policy reform, offering guidance as well as regional and country-level dialogues. The OECD is supporting environment-related action in the Eastern Partnership under the framework of the EU4Environment programme.

Additional remarks

- On **corruption**: this requires attention, as corrupt individuals may seek opportunities during the current crisis (there have already been cases in some countries). Governments need to include more measures on anti-corruption, investigation and enforcement.
- On **second chance and bankruptcy issues**: Streamlined bankruptcy procedures are essential to ensure that entrepreneurs are not mired in liquidation procedures during the current crisis, and that the corporate sector is able to bounce back quickly. Armenia plans on implementing measures and expressed interest to discuss the issue with other countries.
- On **access to finance**: Georgia's post-Covid recovery plan includes a wide range of instruments aimed at improving access to finance, including a new insolvency framework that should be adopted in the coming days. This new law will streamline liquidation of non-viable companies, efficiently utilising and recirculating economic assets in the economy. Structural reforms continue, in order to address the emerging needs of businesses.
- On **SME Support Agencies**:

- In Azerbaijan, the priority remains the same – ensure access to finance, knowledge, markets, and foster digitalisation, while monitoring the business climate. Importance of reducing the levels of bureaucracy in the provision of government services to SMEs and to approve a wider range of tax holidays, to implement structural reforms and produce new mechanisms (e.g. public private partnerships, state investment holding). Current plans for the SME agency: increase the range of online trainings/platforms, develop business support facilities.
- In Moldova, a new programme on SME greening will be launched on 3 July 2020. New support measures are foreseen, providing both informational and financial support. International partners and SMEs are actively involved.

Concluding remarks

Countries expressed gratitude for the event and appreciated the format of discussions. They emphasised the need to think about the post-pandemic period and the medium/long term strategies for SMEs, to pursue the discussions (Georgia) and to exchange more specific information/details between countries (Armenia). The Deputy Minister of Industry and Trade of Afghanistan, Karim Malikyar, also underlined the usefulness of the event.

Supporting Private-Sector Recovery in Central Asia Regional Webinar²

10 June 2020

To support governments in Central Asia, the OECD has undertaken a regional analysis of the likely impact of COVID-19 on countries in the region, examining vulnerabilities and strengths, while also looking to share with our partners relevant OECD experience that might help them formulate their policy responses to the crisis. This high-level ministerial session provided a platform to discuss COVID-19 related challenges in Central Asia, allowing policy-makers from Afghanistan, Kazakhstan, Kyrgyzstan, Mongolia, Tajikistan, Turkmenistan and Uzbekistan to learn from the experiences of their peers and of OECD members – from taxation and monetary policy to employment and education measures – and to chart a more co-ordinated course towards recovery.

Speakers

In order of appearance:

- **Ambassador Peter Burian**, EU Special Representative for Central Asia
- **Mr Andreas Schaal**, Director, OECD Global Relations
- **Mr William Tompson**, Head of the Eurasia Division, OECD (Moderator)
- **Mr Sanjar Mukanbetov**, Minister of Economy, Kyrgyzstan
- **Mr Damdin Tsogtbaatar**, Minister of Foreign Affairs, Mongolia
- **Mr Ashurboi Solekhzoda**, First Vice Minister of Economic Development and Trade, Tajikistan
- **Mr Ajmal Ahmady**, Governor of Da Afghanistan Bank, former Minister of Industry and Commerce, Afghanistan
- **Mr Mukhammetgeldy Serdarov**, Deputy Minister of Finance and Economy, Turkmenistan
- **Mr Shukhrat Vafaev**, Deputy Minister of Investments and Foreign Trade, Uzbekistan
- **Mr Zhaslan Madiyev**, Vice-Minister of National Economy, Kazakhstan
- **Ms Olga Algayerova**, Executive Secretary, UNECE

Opening remarks

Andreas Schaal, Director of OECD Global Relations, and H.E. Ambassador **Peter Burian**, EU Special Representative for Central Asia, opened the event.

- **The COVID-19 pandemic has a significant negative impact on the economies of Central Asia:** trade disruption, consumption and investment plunges affect directly businesses, public finances and economic growth, while underfunded health systems, returning migrants, and high levels of informality risk exacerbating the social cost of the pandemic in the region.
- The COVID-19 outbreak constitutes the **third major exogenous shock to hit Central Asia** in a little more than a decade. It will push the region into recession this year. Globally, the OECD estimates the cost of every month of nationwide lockdown at around 2 percentage points of annual GDP.
- **The crisis underscores the need to tackle long-term structural reforms to the business environment to support long-term recovery and resilience:**
 - **Governments in Central Asia have responded timely and adequately to the economic disruption** by providing liquidity to households and businesses, while on the sanitary front containment has been strictly applied, allowing most countries to start relaxing confinement measures. Short-term public health, monetary and economic policy measures, especially for small firms, have been supported by emergency assistance from international partners. The gradual deconfinement initiated in some countries is already proving difficult to

² This project is implemented with the financial support of the European Union in the framework of the Policy Component of the Central Asia Invest initiative.

manage safely and calls for the use of test, track and trace strategies as well as the continuation of economic support to accompany business recovery.

- **Improved regional policy dialogue and co-operation will be key to any return to sustained growth.** The pandemic has highlighted interdependencies in the region, as border closures exacerbated food and utility supply challenges and reduced trade and economic flows. A co-ordinated approach to re-opening and trade facilitation across the region would therefore help restore confidence, and accelerate recovery.
- Recovery planning offers an opportunity to **build better policies, institutions and growth models**, learning from the past and working to **reconstruct a greener, fairer economy**. In the medium and long run, trade and private investment will be needed to diversify economies, and increase their competitiveness by allowing for meaningful job creation and infrastructure investment. The OECD stands ready to support this process with knowledge, help and advice, fostering the exchange of good practices and continuing the close co-operation between the EU and the OECD.

Ministerial discussion: national economy and private sector recovery support measures in Central Asia

Economic Impact and Policy Responses to the COVID-19 in Central Asia

OECD Secretariat

- **Current state of Covid-19 pandemic in Central Asia:** The COVID-19 pandemic reached the region relatively late, yet containment measures have severely affected national economies, particularly small and medium-sized enterprises (SMEs), while the deterioration in external circumstances has exacerbated national fiscal pressures due to falling export revenues and migrant remittances. The crisis has also exposed shortcomings in public finance management, the limited development of the private sector, and the insufficient customs and border management co-ordination. The adverse effects of the crisis on economic growth, employment, and public finances are likely to endure well beyond the initial phase of the health crisis, and reinforce the need for a strong private sector-led recovery.
- **Economic policy responses** in the region aimed at sustaining household incomes and business activity to protect macroeconomic fundamentals, including through dedicated national plans or funds to gather and channel financial flows.
 - **Households** have benefitted from an expansion of social safety nets, mainly through extended social and unemployment benefits, and distribution of in-kind contributions for the most vulnerable. OECD member economies have also used short-term work schemes that could be beneficial to the region.
 - **On the business front**, increases in liquidity and credit lines for businesses have been implemented in virtually all countries. Fiscal measures have included deferrals of loan repayment, as well as postponement of tax declarations, deferral of tax and social contributions and suspension of tax audits. These measures could be ramped up as tax measures and credit guarantees have been widely used in OECD countries.
- **Ensuring long-term economic growth** will require steps to foster further diversification of economic activity and carry out long-overdue reforms of competition policy frameworks and the governance of State-Owned Enterprises. **Improving the overall environment for firms will require that governments continue their reform efforts**, and undertake the regulatory, policy and investment decisions that supply the conditions for business development in the long run.

Country policy responses during the lockdown and early deconfinement phases (in order of speaker)

KYRGYZSTAN (Mr Sanjar Mukanbetov, Minister of Economy)

On the role of digital solutions in supporting the private sector:

- The government of Kyrgyzstan has implemented so far **two anti-crisis plans**, in particular the Act on New Economic Freedom and Development, which aims to re-launch economic activity in Kyrgyzstan and amounts to 5.2% of GDP. A third package focused on recovery planning and long-term measures is currently being prepared.
- **The successive support packages aimed in particular at further digitalising the economy.** They include the introduction of cashless payments and the further advancement of digitalisation programmes, especially tax administration and the introduction of an electronic for electronic tax reporting. However, access to digital services remains constrained by low internet penetration.

MONGOLIA (Mr Damdin Tsogtbaatar, Minister of Foreign Affairs)

On regional co-ordination:

- The Minister called for **increased co-operation and regional dialogue** to find common solutions to the pandemic and co-ordinate border management between Central Asia countries.

On the use of employment schemes to support wages and employment in the private sector:

- **Mongolia implemented a national package of seven measures totalling MNT 5.1trn (USD 1.8bn) to protect citizens' health and incomes, preserve employment and stimulate the economy.** In particular, one of the measures covered a monthly payment for three months to employees of private companies that keep their workers on the job despite declining revenues. In addition, six-month tax and social security payment exemptions were introduced to support firms, while the Central Bank reduced its policy rate to stimulate liquidity provision by commercial banks. Over 90% of businesses have benefited from these measures.

AFGHANISTAN (Mr Ajmal Ahmady, Governor of the Central Bank, former Minister of Industry and Commerce)

On the implementation of targeted and localised solutions, and support to the informal sector:

- **The government's crisis response has been dominated by the provision of adequate food supply, targeting the most vulnerable populations.** Erratic border closures and the spring flood season have added strain to the food supply in the country, while the size of the informal sector has exacerbated the pandemic's negative impact on households. The government has put in place a large-scale programme, handing out daily food supplies to vulnerable groups using bakeries in selected cities. Thanks to the co-operation with the latter, the programme could be implemented within two weeks in Kabul and all 34 provinces of the country. The programme serves up to 1m people in Kabul alone.
- **On the economic side, government support has focused on the reopening of borders and support to SMEs.** Early on, borders were reopened with Pakistan and Turkmenistan to ensure adequate food supply. SMEs have benefitted from an extension of the deadline for filing income tax returns and relief for various payments (suppliers, rental, and electricity).

TAJIKISTAN (Mr Ashurboi Solekhzoda, First Vice Minister of Economic Development and Trade)

On the support of returning migrants and support to job creation by the private sector:

- **Recovery planning focuses on supporting SMEs, returning migrants, and vulnerable segments of the population.** Labour remittances have dropped by 40-50% compared to 2019. The government has therefore introduced a minimum wage paid to all vulnerable segments of population, including the families of labour migrants that were left without income. In addition, to support businesses in the early stages of recovery, SMEs in selected sectors (such as tourism, or catering) and patent workers are relieved from tax payments.

TURKMENISTAN (Mr Mukhammetgeldy Serdarov, Deputy Minister of Finance and Economy)

On measures to maintain export levels and support investors and profit repatriation:

- **The government has designed a recovery plan spanning 2020 and 2021, aiming at export promotion and investment attraction.** In particular, the government targets an increase in exports in the gas, chemical, construction, and chemical sector. In addition, free trade zones will be introduced to support and attract investors.

UZBEKISTAN (Mr Shukhrat Vafaev, Deputy Minister of Investments and Foreign Trade)

On the reshuffling of investment policy to support recovery:

- **The government is reconsidering its investment policy to adapt to the new challenges caused by the pandemic** with the support of international organisations. Improvements in basic infrastructure (water, utilities, gas, and electricity) will support local investors, while efforts are also undertaken to equalize the treatment of domestic and foreign investors. Also, the government will expand the number and scope of special industrial zones to accelerate the implementation of projects. Additional measures in the context of the COVID-19 have targeted employment support as well as liquidity provision to businesses.

KAZAKHSTAN (Mr Zhaslan Madiyev, Vice-Minister of National Economy)

On the use of credit guarantees and soft loans to support firms:

- **The government has designed an anti-crisis package** to cushion the economic impact of the pandemic for businesses, in particular SMEs. Firms are granted liquidity support, loan guarantees, and temporary tax reliefs to sustain operations

and shield employment. The National Social Security Fund also grants wage subsidies, channelled through firms to employees of SMEs on unpaid leave until the end of the emergency situation.

- **State-guaranteed loans with delayed repayment schedules have been used to provide businesses with liquidity.** Subsidised lending has been provided under the state program “Economy of Simple Things” (KZT 1 trillion) which increased the reserve of state-issued credit by KZT 400bn, and reduced associated interest rates from 13-15% to 6%.

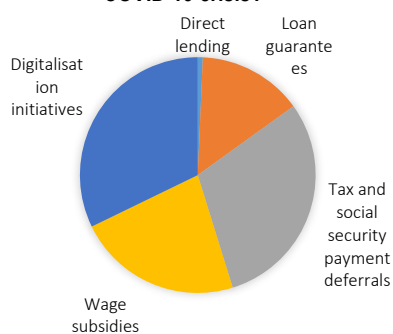
Open discussion

Poll results

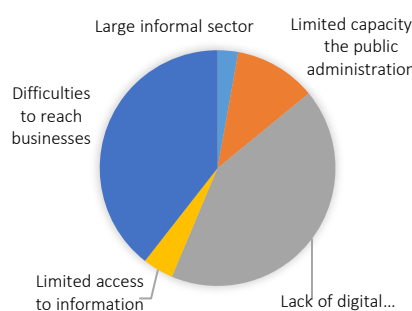
Participants were asked to reflect on challenges stemming from the crisis, the way forward in supporting firms during recovery, the potential impact on long-term policy priorities, and the key barriers to successful implementation of immediate anti-crisis measures:

- **Wage subsidies and tax and social security payment deferrals** were thought to be the most effective policy instrument for firm support, ahead of credit guarantee provision and direct lending.
- **The limited capacity of the public administration** remains the biggest challenges for effective delivery. Digitalisation of the administration also appeared as a key priority that is hindered by the lack of digital infrastructure.
- Going forward, **connectivity** - in particular **digitalisation** and e-commerce - and **regional value chains** appeared to be the most promising avenues for business resilience and competitiveness.

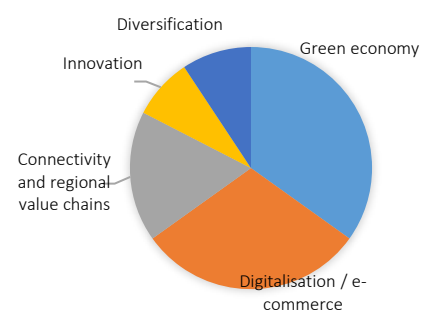
Which policy instruments do you believe are most effective to support firms during the COVID-19 crisis?



What is the biggest challenge in quickly delivering effective firm support?



Following the crisis, what is the most promising avenue for promoting business resilience and competitiveness?



Remarks from the discussions

The likely impact of COVID-19 on corruption has already materialised on public procurement and the disbursement of stimulus packages. Public procurement, especially in the healthcare sector, has not followed proper and formal procedures, and this might have granted undue advantage to some agents in the midst of the crisis. Also, the effective implementation of stimulus packages, both for individuals and businesses will have to be closely monitored. The integrity of both processes is key, and governments need to assess their crisis performance against anti-corruption measures, investigation, and enforcement. Ms **Olga Savran**, Head of the OECD’s Anti-Corruption Network for Eastern Europe and Central Asia, drew attention to the work being done by the OECD to help governments counter corruption in procurement and support measures related to anti-crisis measures.

Policy considerations to support the long-term resilience and recovery cover in priority:

- **greening economies**, for instance by making support schemes conditional on environmental performance;
- **accelerate digitalisation processes**, both of public services, and for business opportunities such as access to e-commerce;
- **improve trade connectivity and regional co-operation**;
- **improved fiscal positions** through better resource mobilisation to avoid fiscal pressures and donor dependency; and
- **continued implementation of long-term structural reforms** to continue improving institutional and regulatory framework for businesses.

Ms **Olga Algayerova**, Executive Secretary of UNECE, closed the discussions by emphasising the relevance of regional dialogue and the key role of co-operation in reviving trade and sustainable growth. In this regard, efforts to go digital, improve trade connectivity and foster the greening of economies need to be high priorities in the reform agenda of Central Asian countries.

Concluding remarks

The OECD confirmed its readiness, with EU support, to pursue the successful co-operation as part of the OECD Central Asia Initiative. Going forward, joint work will cover support for recovery planning, and continued support for longer-term reforms, including on the legal environment for business. Countries expressed their gratitude for the event and reiterated their commitment to pursue the joint work.

OECD Eurasia Competitiveness Roundtable



The 2020 edition of the **OECD Eurasia Competitiveness Roundtable** was convened as a series of four webinars organised by the OECD Eurasia Competitiveness Programme between 17 and 25 June 2020. The OECD Eurasia Competitiveness Roundtable is a platform for OECD members and Eurasia partner countries to carry out peer reviews of competitiveness reforms. The Chair of the Roundtable is H.E. Professor Aleksander Surdej, Ambassador and Permanent Representative of Poland to the OECD.

Promoting Exports and Supply-Chain linkages in the Food industry

Snapshot of Moldova

The food-processing sector plays a vital role in Moldova, where it accounts for 37% of production and 26% of employment in the manufacturing sector. Yet more can be done to help food-processors reach their full potential. Better integration of food producers into global value chains through export or supply chain linkages with food retailers would allow local food producers to scale-up, increase productivity and ultimately enhance the sector's contribution to economic growth. This webinar discussed the challenges and opportunities related to the competitiveness of Moldovan food producers and ways to promote their integration into global value chains.

Speakers

In order of appearance:

- Professor **Aleksander Surdej**, Ambassador and Permanent Representative of Poland to the OECD and Chair of OECD Eurasia Competitiveness Roundtable
- Mr **Sergiu Railean**, Minister of Economy and Infrastructure of the Republic of Moldova
- Mr **Mathieu Bousquet**, Head of Unit NEAR C1, Neighbourhood East, European Commission
- Mr **Patrik Pruzinsky**, Policy Analyst, OECD Secretariat
- Ms **Iuliana Dragalin**, State Secretary, Ministry of Economy and Infrastructure of the Republic of Moldova
- Ms **Iulia Costin**, General Director, ODIMM, Republic of Moldova
- Mr **Ján Oravec**, State Secretary, Ministry of Economy, Slovak Republic
- Ms **Noreen Lanigan**, Regional Manager Europe & North America, Bord Bia, Ireland
- Mr **Serghei Martinov**, CEO, METRO Cash & Carry Moldova
- Ms **Nino Eliashvili**, People and Organisation Lead, PwC Georgia
- Ms **Gulnar Bizhigitova**, Head of Department of Processing and Co-operation, Ministry of Agriculture of the Republic of Kazakhstan

Opening remarks

Since the signing of the DCFTA, **exports to the EU have increased by 44% and today the EU is Moldova's most important trading partner**. Yet, **many small enterprises are not benefitting from the agreement, due to their low competitiveness** in international markets. The co-operation with the OECD is much appreciated and essential to further developing the sector's potential (*Mr Sergiu Railean*).

Since the signing of the DCFTA, **trade between the EU and the Eastern Partnership increased by 75% and today the EaP is the EU's 10th trading partner**. The EU is providing significant support for the implementation of the DCFTA in the EaP region and for SME development in five key areas: policy and legal framework, access to finance, skill building, access to markets, and internationalisation. The Covid-19 crisis underlines the ongoing need for continued reforms in these fields and to strengthen economic resilience (*Mr Mathieu Bousquet*)

Panel discussion: how to support export and supply-chain linkages

Policy priorities for Moldova

More than 60% of SMEs involved in the processing of non-animal food products either do not export or export less than 20% of their total turnover, although over 80% of SMEs participating in an OECD survey expressed interest in doing so. Integration with domestic supermarket chains remains limited as more than **half of the surveyed SMEs do not directly sell their products to local supermarket chains**, which are increasingly dominant in the local retail market. The OECD report's recommendations focus on three main objectives: **prepare food processors for integration into GVCs; promote supply chain linkages between processors and supermarkets; and improve SME access to foreign markets** (*Mr Patrik Pruzinsky*).

As part of its commitments under the DCFTA, the government has already achieved the **accreditation of food laboratories** with EU and ISO standards, the finalisation of a **legal framework for animal protection**, the alignment with the EU of the majority of the **safety standards** and their enforcement by the National Agency for Food Safety (ANSA). **The crisis has underlined the need to further strengthen the resilience and competitiveness of the agriculture sector** by adopting technologically innovative solutions to the crisis (*Ms Iuliana Dragalin*).

In 2019, ODIMM launched a **programme to support SMEs** (including in the agri-food sector) to support the transition to the **green economy**; in May 2020, it launched a digitalisation programme to boost **access to market and online marketplaces**. Among the participants to ODIMM training workshops, participation of entrepreneurs from the agriculture sector is high, manifesting the economic potential of the sector (*Ms Iulia Costin*).

Lead reviewer observations and OECD country experience

Building on the experience of the Slovak Republic, Mr Oravec reflected on the choice between heavy regulations including draconian penalties on violations of health and safety standards on the one hand, and soft measures, such as the promotion of local products through voluntary initiatives on the other hand. He stressed that **soft measures have been much more effective in increasing the competitiveness of the food industry in the Slovak Republic**. At the same time, it is crucial for the government to **provide a healthy business environment** that is highly attractive for foreign and domestic investments and in which firms can thrive (*Mr Ján Oravec*).

Ms Lanigan shared Ireland's experience in realising her country's agricultural export potential. **Long-term reputation building** through decades of **meticulous quality assurance** has enabled Ireland to become a major exporter of agricultural products. Today over 80% of dairy and over 90% of meat production are exported. The success of Ireland's exports is based on an approach articulated in four main pillars: (i) **Success and growth in the marketplace**; (ii) Economic growth led by research insights; (iii) **Building reputation for growth**; (iv) **Leading through people** (*Ms Noreen Lanigan*).

Perspectives from the private sector

Moldovan producers have progressed remarkably in ensuring the quality of agricultural products. However, unstable supply, lack of exporting skills and poor promotion activities still persist. Through **collaboration** and **sustainable partnerships with producers**, METRO focuses on delivering technical trainings to help SMEs seize their potential (*Mr Serghei Martinov*).

In the Georgian experience, the determining factors in supporting SME-MNE linkages are **high-level political support and commitment**; the **allocation of sufficient budget** and **specialised human resources**; **trainings** for both SMEs and MNEs; **information campaigns** and **matchmaking** events (*Ms Nino Eliashvili*).

Experience from Eurasia countries

The Kazakh government successfully supports its agricultural exports by enabling direct participation of producers in **international fairs**; promoting the acquisition of **certificates and standards**; and conducting **diagnostics of the transport infrastructure** and **market studies**. Now over 500 different agricultural products are exported from Kazakhstan to over 20 different countries (*Ms Gulnar Bizhigitova*).

Open discussion

Q&A session and additional remarks

Is the agri-food sector attractive for young entrepreneurs?

- While the food-processing sector has still a wide margin for further development, the government of Moldova is eager to support young entrepreneurs that want to innovate and grow in that sector (*Ms Iuliana Dragalin*).
- Young Moldovan entrepreneurs are coming up with forward-looking, innovative solutions, including in agriculture. New ideas focus on modernising equipment, energy savings, and developing products with an international appeal. Their contribution is welcomed and encouraged by ODIMM with special competitions and grants that have helped local firms become more competitive (*Ms Iulia Costin*).

Electronic identification of animals and products **enhances the traceability** of food supply, particularly critical in global value chains, and **increases the efficiency and resilience** of supply chains (*Mr Marcus Pikart, Economic Affairs Officer, UNECE and Ms Vladislava Magaletska, Vice President, SigmaBleyzer Investment Group*).

Concluding remarks

State Secretary Dragalin expressed gratitude for the event and the support provided by the European Union and the OECD.

SME Strategies for 2021 and Beyond.

Snapshot of Ukraine

In 2017, the Government of Ukraine adopted a comprehensive SME development strategy, and initiated significant reforms in the institutional framework for SME policy through the creation of the SME Development Office (SMEDO) and the inter-ministerial Co-ordination Council on Micro and Small Entrepreneurship Development. This webinar discussed a draft OECD Peer Review note assessing the state of implementation of Ukraine's SME development strategy, and providing recommendations for future policy action as well as targeted advice on how to build an effective, result-oriented monitoring system for the strategy.

Speakers

In order of appearance:

- Mr **Dmytro Romanovych**, Deputy Minister for Development of Economy, Trade and Agriculture, Ukraine
- Ms **Julda Kilyte**, Team Leader, Economic and Fiscal Reforms Team in Support Group for Ukraine, DG NEAR, European Commission
- Mr **Francesco Alfonso**, Project Coordinator, Eurasia Division, Global Relations Secretariat, OECD
- Mr **Andriy Slabinskiy**, Director, SME Development Office, Ukraine
- Mr **Janez Šušteršič**, Peer reviewer
- Mr **Mikheil Khidureli**, CEO, Enterprise Georgia
- Mr **Bakytzhan Makazhanov**, Deputy Head, Damu Entrepreneurship Development Fund, Kazakhstan

Opening remarks

The government of Ukraine acknowledges the **vital role of SMEs in the economy**: they represent 63% of total employment and nearly half of value-added. Efforts to support SMEs have followed OECD guidelines and are set out in the 2017 SME Strategy and in the 2018 Action Plan adopted by the government. Among the most notable results, the government has **simplified the regulatory environment for businesses and improved the availability of e-government services**. Access to finance, simplification of the tax administration and entrepreneurial learning are high on the government agenda for 2020 (*Mr Dmytro Romanovych*).

The **EU is providing significant support to Ukrainian SMEs, including through targeted financial support in response to Covid-19** (via preferential loans and loan guarantees), and will continue to support implementation of the national SME strategy post-2020. **The government shall not lose momentum and focus on increasing the competitiveness of the SME sector moving towards innovation, sustainability and digital transformation** (*Ms Julda Kilyte*).

Panel discussion

Implementation status of SME strategy and policy priorities for Ukraine

The government has implemented a number of significant reforms to improve the environment for SMEs, which has been reflected in Ukraine's positive performance in the OECD SME Policy Index (SMEPI) 2020. By June 2020, among the actions listed in the Action Plan, 75% were marked as "in progress", 22% were executed, and 3% are to be removed from the Action Plan.³ For the development of a potential future SME strategy, the OECD recommends **carrying out a cost analysis and ensuring budget availability** for the implementation period; **standardising the use of KPIs** to monitor progress; performing a **yearly review of implementation** of regulatory policy; prioritising the promotion of banking competition and **advancing on the pilot Credit Guarantee Scheme**; joining the Global Entrepreneurship Monitor and intensifying SME skills intelligence and forecasting; securing adequate financial and human resources for Export Promotion Office; and conducting a study of the market for business support services and the role of BSOs (*Mr Francesco Alfonso*).

A determining factor in the implementation of the Action Plan was the **adoption of a monitoring framework to track progress** on a regular basis. A crucial lesson learnt was the importance of ensuring upfront allocation of resources for the implementation of planned activities. A significant amount of knowledge diffusion surrounding SME support has taken place at the regional and local

³ These updated figures were received after the peer review, and are thus differing from the ones initially communicated.

levels, including on digitalisation, access to finance and export promotion. New initiatives are under way, including **online support solutions for SMEs** and **improving access to public procurement**. A government priority is to **incorporate the SME Development Office (SMEDO) as a state institution**, and ensure that **sufficient back-up is in place to address COVID-19 related challenges**. (Mr Andriy Slabinskiy)

Lead reviewer observations

A recommended approach for the government would be to **prioritise reforms in areas where implementation has so far been less successful**. In terms of reporting, while the Ministry for Development of Economy, Trade and Agriculture and SMEDO have made significant progress in developing reporting templates, **obtaining regular information from the agencies and ministries that are in charge of implementing measures is still critical**. Performance targets are a key element of monitoring and evaluation, and were developed by the OECD on the basis of the same figures that were cited in the Action Plan. **The government should make full use of the indicators, in order to fully evaluate progress** made towards SME development goals (Mr Janez Šušteršič).

Experience from other countries

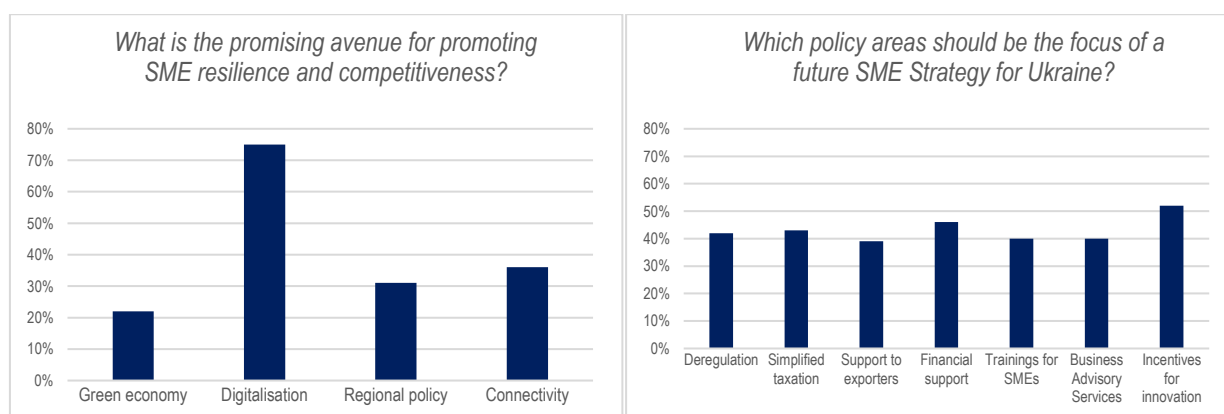
In Georgia, the crisis has had a negative impact on businesses, but it has also allowed Enterprise Georgia to **gain more influence through additional budget allocation and increase its SME support**. Anti-crisis measures adopted to support SMEs include loan subsidies, micro and retail grants, decentralisation of business development services and online trainings for exporters (Mr Mikheil Khidureli).

In Kazakhstan, the government has helped SMEs to weather the Covid-19 crisis through subsidies on interest payments, loan guarantees, cheap funding to banks and MFIs, and non-financial tools such as business advisory and risk management. The government had lifted restrictions on sectors of the economy that were eligible for state support and introduced a new loan guarantee scheme, which provides 85% credit guarantees on small loans with no additional collateral required by SMEs. **Almost all SME business development services can be provided online**, which has enabled the government to provide extensions of the payments of loans worth more than USD 1 billion during quarantine (Mr Bakytzhan Makazhanov).

Open discussion

Poll results

Results show a **very strong preference for digitalisation** as the most promising avenue for promoting SME resilience and competitiveness, especially in the aftermath of the Covid-19 crisis. Results regarding the policy areas for the future SME Strategy of Ukraine are more balanced, with a **slight preference for incentives for innovation** and financial support.



Q&A session and additional remarks

What is the size of the informal economy in Ukraine, and how effective are regulations to reduce it?

- The level of informality in the SME sector is high, also because **three issues persist in discouraging businesses from joining the formal economy: heavy regulation, cumbersome labour market rules and complex tax administration**. Despite the adoption of a simplified taxation model, **tax administration remain an area of concern**. The government and SMEDO are undertaking efforts to reduce regulations, simplify employment rules and make it easier for businesses to hire staff (Mr Dmytro Romanovych).

- Ukraine needs to **think critically about how to return SME development to pre-COVID levels**. In particular, **specific export promotion measures should be included in the new SME development strategy** (*Ms Tetyana Korotka*).

What lessons has the government learnt from the first round of SME strategy implementation?

- The legislative system should be made **more flexible**, in order to formulate effective and rapid policy response where necessary. And while checks and balances remain an important virtue, establishing a **flexible institutional set-up is also key for good governance** (*Mr Dmytro Romanovych*).
- Current policy trends are shifting away from grants and leaning **towards loan guarantees and innovative support measures**. For example, remittances from abroad can be effectively channelled into productive investments through matching grants. In addition, a stronger emphasis on peer lending, digitalisation of SMEs and the green recovery could generate new opportunities for Ukrainian SMEs (*Ms Julda Kielyte*).
- Burdensome tax administration remains a major problem that is yet to be effectively addressed. Similarly, the **erratic nature of regulations for SMEs is creating burdens** to entrepreneurs. In addition, **labour market inefficiencies are a long-standing hindrance for SMEs**, and the government shall assist SMEs in order to increase their productivity (*Ms Nadiya Bedrychuk*).
- **Trial and error can lead to productive policy outcomes**. The Georgian experience shows that in a crisis, policy-makers are encouraged to target a broad range of beneficiaries and test some new measures. These experiments can help to shape a more effective post-crisis policy framework (*Mr Janez Šušteršič*).

Concluding remarks

The government is currently in the process of drafting an updated SME development strategy, based on four pillars: improving the business environment, improving access to finance, improving access to markets and improving business infrastructure. There is a need to think critically about what kinds of policy instruments should be placed in the hands of government, including in terms of the regulatory environment and setting limits on the power of administration. Deputy Minister Romanovych was grateful for the fruitful discussion and thanked EU and OECD partners for supporting SME development in Ukraine.

Business Development Services for Firm Growth

Snapshot of Kyrgyzstan

Successful reforms to strengthen the private sector through effective co-operation and facilitation of public and private business development services (BDS) can play an important role in promoting firm growth and development, whilst also reducing informality. In particular, the creation of one-stop shops, the digitalisation of public services and closer collaboration with business intermediary organisations can facilitate the delivery of BDS in Kyrgyzstan, supporting SME and entrepreneurship development. This webinar discussed the challenges and opportunities related to the successful provision of services for businesses – both physical and digital – and their relevance in the context of the COVID-19 crisis

Speakers

In order of appearance:

- **H.E. Professor Aleksander Surdej**, Ambassador and Permanent Representative of Poland to the OECD and Chair of the OECD Eurasia Competitiveness Roundtable
- **Ms Charlotte Adriaen**, Head of Co-operation Section, European Union Delegation to Kyrgyzstan
- **Mr Alymbek Orozbekov**, Head of the Economy and Investment Department at the Office of the Prime Minister of Kyrgyzstan
- **Ms Akylai Kozhombardieva**, Head of the Entrepreneurship Regulation Policy Department at the Ministry of Economy of Kyrgyzstan
- **H.E. Mr Muktar Djumaliev**, Ambassador of Kyrgyzstan to Belgium
- **Ms Talisa zur Hausen**, Policy Analyst, OECD
- **Ms Nuria Kutnaeva**, Director of Tunduk
- **Mr Robin Ord-Smith**, Business Ombudsman of Kyrgyzstan
- **Ms Martyna Wieczorek**, Senior Expert, Department of Small and Medium Enterprises, Ministry of Economic Development, Poland
- **Mr Yuri Chebotar**, Deputy Minister of Economy of Belarus
- **Ms Adile Keshfetdinova**, Main Consultant, Public Services Agency, Ministry of Justice, Uzbekistan
- **Mr Salekhin Khan**, Economic Cooperation and Trade Division UNECE

Opening remarks

SMEs and entrepreneurship are key drivers of growth for Eurasia economies, and governments should support them by establishing the right framework conditions (*H.E. Aleksander Surdej*). In Kyrgyzstan, **important barriers** still limit their growth. These include the limited availability of business development services (BDS), difficulties in accessing public services (registration/ taxation/ licensing), and the complex taxation. In this regard, the co-operation with the OECD and the EU aims to help the government further support business development through a better provision of services to businesses (*Ms Charlotte Adriaen*).

The **COVID-19 pandemic** and its economic effects further strain the ability of SMEs to grow, as the GDP is expected to shrink by 5.3% in 2020. Despite the impact on public finances, the government has prepared a **stimulus package to weather** the COVID-19 crisis that put SMEs and the private sector at the centre of support measures, in particular through tax, social contribution, and loan deferrals. Going forward, export promotion and the improvement of the business climate will be core features of sustained growth (*Mr Alymbek Orozbekov*).

Finally, Kyrgyzstan has focused its economic diplomacy efforts on **trade openness and fostering trade agreements**, in particular as part of the GSP+ programme of the EU. Going forward, debt relief will be a key issue for the country (*Mr Muktar Djumaliev*).

Panel discussion

The **Covid-19 pandemic** has severely affected the labour market and the private sector in Kyrgyzstan, and highlighted the need for provision of reliable digital and physical public and private services to businesses. The **OECD peer review based on a survey of 250 Kyrgyz firms revealed that a majority of SMEs are composed of individual entrepreneurs, indicating the difficulty of**

businesses to grow. This is partly due to scattered public services, a large information gap with respect to available services, and an underdeveloped BDS market for SMEs.

In this regard, the **OECD peer review note recommends that the government improve public service provision to businesses, assess demand for BDS, act as a broker between supply and demand, and stimulate private BDS supply to foster MSME growth.** In particular, establishing whole of government one-stop-shops, streamlining licensing and certification processes, and partnering with business associations to deliver affordable and good quality private services are priority areas for reform. (*Ms Talisa zur Hausen*).

Implementation measures

Kyrgyzstan's digital initiative and system – Tunduk – is based on the Estonian experience of integrating all government services in one platform to offer better public services to citizens and businesses. It has improved the quantity and quality of public services provided to businesses. Public services and financial transactions are increasingly going digital as more and more Ministries and agencies get integrated in the system. For instance, in 2019, 5 million transactions between public agencies and citizens/companies happened online. COVID-19 has also fostered the rapid digitalisation of services, including notary services or payment of allowances (*Mr Nuria Kutnaeva*).

In this regard, **the COVID-19 crisis could also be seen as an opportunity to enhance the business environment especially in terms of digitizing public services and procedures.** Digitalisation brings many advantages (speed, low costs, less bureaucratic procedures, reducing corruption) and should be accelerated (*Mr Robin Ord-Smith*).

Lead reviewer observations and perspectives from Eurasia Partner countries

E-government not only makes it possible to reduce the administrative costs for businesses, but can also be used as an **opportunity to set common standards, and encourage businesses to use new innovative tools.** This was for instance the case with the “cash-less” and “paper-less” programmes implemented in Poland (*Ms Martyna Wieczorek*).

Belarus and Uzbekistan shared their experiences of digitalising the administration. In Belarus, a new phase will be launched on 1 July, focusing on SME digitalisation, and on the development of wide range of regional centres supporting them. In Uzbekistan, the Ministry of Justice has enhanced digital service delivery following the outbreak of COVID-19 (*Mr Yury Chebotar and Ms Adile Keshfetdinova*).

Open discussion

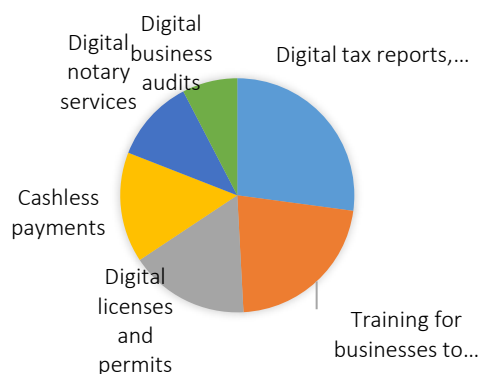
Poll results

An instant poll of participants showed that market access services were thought to be the most effective services for firm growth by 45% of the participants, while 64% thought that digital tax administration and transition of firms to e-commerce should be the core digitalisation response. During the open discussion, participants exchanged with panellists on various issues related to current policies on BDS and firm growth, the importance of digitalisation, and the impact of measures taken by the government in light of the Covid-19 crisis to support service provision. As noted by the OECD, digitalizing the tax administration, as in Kazakhstan, can be a transformative step.

What private business development services most help businesses to grow?



Which type of public service digitalization is most needed to help businesses weather the COVID-19 crisis?



Q&A session and additional remarks

On the sequencing of the introduction of a single digital administration system

At the onset of implementing Tunduk, Kyrgyzstan faced both technical and outreach issues. For instance, the initial implementation phases focused on awareness and capacity building of government officials to answer requests from state agencies. Following this initial phase, Tunduk's agenda has been articulated in three phases: (1) getting all ministries to join the platform, (2) implementing the one-stop shop system, and (3) developing a unique digital identifier (e-ID) (Ms Nuria Kutnaeva).

On the conduct of trade facilitation agreements after COVID-19

The UNECE is currently carrying out a survey on the impact of the pandemic on trade and trade measures, and will be launching a report of best practices for trade facilitation to address these issues (Mr Salehin Khan).

Concluding remarks

The session was concluded by Ambassadors Surdej and Djumaliev underlining the importance of collaboration with the OECD and the EU in developing Kyrgyzstan's private sector towards recovery.

Effective Support Services for SME Competitiveness

Snapshot of Belarus

The Government of Belarus has launched notable reforms in support of the SME sector in recent years by adopting a comprehensive SME development strategy and by developing plans to establish a dedicated SME support agency. In 2017, based on work carried out by the OECD with the Ministry of Economy, the OECD provided recommendations to strengthen the market for business development services (BDS) in Belarus to improve SME skills and increase their competitiveness. Recommendations focused on three main areas: upgrading the institutional framework for the delivery of business support services, unlocking the latent demand for them, and promoting a market-orientated supply of these services. This webinar reviewed progress in implementing the recommendations and discussed ways forward in delivering tailored SME support programmes.

Speakers

In order of appearance:

- Mr **Aleksandr Chervyakov**, Minister of Economy, Belarus
- Mr **Jeroen Willems**, Deputy Head of EU DG NEAR, European Commission
- Mr **Antti Rauhala**, Policy Analyst, OECD
- Mr **Dmitry Yaroshevich**, Deputy Minister of Economy, Belarus
- Mr **Antonio Fanelli**, SME Policy Expert
- Ms **Oxana Paladiciuc**, Head of Business Support Infrastructure division at ODIMM Moldova
- Mr **Anders Jonsson**, Chief, Innovative Policies Development Section, UNECE

Opening remarks

The government of Belarus has improved the environment for SMEs and in 2019, SMEs accounted for 26.1% of GDP, 30% of gross value added, 43.2% of sales revenues, and 47.8% of exports. However, the **Covid-19 crisis risks turning this positive trend and hamper SME competitiveness**. In the short term, the SME reform agenda focuses on providing indirect support to enterprises by reducing taxation and expenses; offering subsidies to ensure the payment of minimum salaries; and identifying challenges and adequate policy responses in collaboration with business associations. In the medium term, the **government will focus on the challenges of liquidity and insolvency of enterprises**. The government will make use of the OECD recommendations to continue develop systematic measures to address the pandemic and its shortcomings (*Mr Aleksandr Chervyakov*).

Belarus has adopted an SME development strategy 2030, has simplified regulation for doing business, and is establishing a SME development agency. This progress was captured by the **SMEPI assessment**. **Yet the potential for SME development is still untapped**. It is crucial that the government observes the **“think small” principle** when drafting policies and **considers the direct and indirect effects of policies and legislations on SMEs**. The way forward shall tackle efforts to improve the level playing field for every enterprise, skills development and broader and more comprehensive entrepreneurship reforms. The EU reaffirms its commitment to support SMEs in Belarus within the framework of the EU4Business initiative (*Mr Jeroen Willems*).

Panel discussion

Policy priorities for Belarus

In line with the recommendations set out by the OECD, the Ministry of Economy of Belarus has taken measures to develop a market for BDS, aiming at improving SME skills and increasing the role of SMEs in the Belarusian economy. These include the adoption of the SME strategy, the establishment of an SME development agency, the regular consultations with the private sector, and the promotion of a market-oriented supply of BDS. As a priority going forward, the government may want to consider **improving access to finance for SMEs, addressing shortages of the skilled workforce, and implementing support programs targeted at high-growth enterprises** (HGEs) (*Mr Antti Rauhala*).

In line with the OECD recommendations, the government of Belarus has made progress in three directions:

1) **improving the institutional framework for BDS** in close collaboration with the business community and

reinforcing the mandate of institutions involved in SME support; 2) **better identifying business needs through surveys, consultative councils with experts, and platforms for public-private dialogue**; 3) **introducing non-financial support services** and engaging agencies more actively (*Mr Dmitry Yaroshevich*).

Lead reviewer observations

In response to the Covid-19 crisis, the **short-term priority** for public institutions shall be to **increase the resilience of SMEs** and **ensure access to credit** to prevent the transformation of the current liquidity crisis into an insolvency crisis. However, the **Covid-19 crisis shall not divert the attention of policy makers from structural issues in the Belarusian economy**: First, the SME population density is low compared to OECD and the other EaP countries, and its contribution to GDP is rather limited. Second, SOEs dominate the economy and the few HGEs in the high-tech sector (despite its vibrancy) are not integrated with the rest of the economy, hampering the transfer of innovations to other parts of the economy. To address these constraints, the government shall **enhance the co-operation between the Ministry of Economy, the SME development agency and the private sector** and follow two main directions: **promote and diffuse entrepreneurship**, and **provide targeted services to innovative enterprises** to help integrate HGEs into the broader economy (*Mr Antonio Fanelli*).

Experience from other countries

Moldova's experience confirms that **monitoring is a crucial step for the effective delivery** of programmes and services in support of SMEs, as it records and allows the evaluation of such programmes and the identification of SME needs. ODIMM conducts monitoring in three main directions: 1) **before and after the delivery of training sessions and events**; 2) **pre-financing monitoring**; and 3) **post-financing, 2 years after the receipt of the grants** (*Ms Oxana Paladiciuc*).

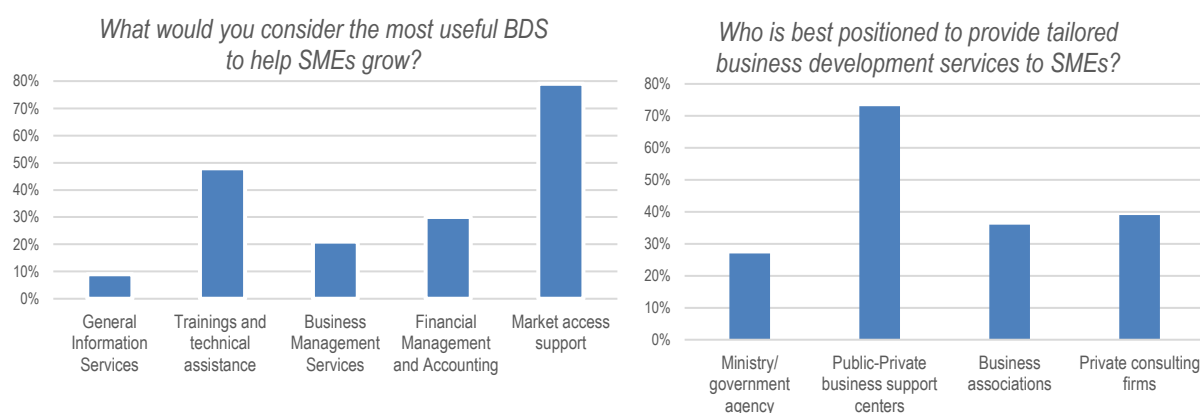
Perspectives from partner organisations

SME strategies shall be **two-pronged** and **distinguish between innovative HGEs and other SMEs**. Given the large potential for SME development in Belarus, **institutions and programmes supporting SMEs shall be redesigned and the role of the private sector enhanced**. The way forward should include **data gathering from the private sector, and set up solid monitoring and evaluation mechanisms** to understand HGEs and the ways the government can support them (*Mr Anders Jonsson*).

Open discussion

Poll results

Results show a **strong preference for services supporting market access**, followed by trainings and technical assistance, both of which can be costly for SMEs to obtain on their own. The public sector alone is not the preferred provider of such services: preferences indicate that **public entities shall deliver BDS services in conjunction with business associations and the private sector** (*Mr Daniel Quadbeck, Senior Policy Analyst, OECD Secretariat*).



Q&A session and additional remarks

What are the limits of BDS provided by the public sector?

- For now, advice is mostly given through private organisations. The government could step in and implement two kinds of mechanisms that would **screen service providers and encourage SMEs to make use of such services** at their discretion (*Mr Dmitry Yaroshevich*).

Following the outbreak of the Covid-19 pandemic, BEROC conducted activities to gather data on its impact on the private sector. So far, the three main issues presented by SMEs are: 1. **Decreasing local and international demand**; 2. **Low margins** as businesses keep prices down despite the fall in revenues; 3. **Decreasing salaries** and cuts of staff to varying extents in the different sectors. The outlook of business on future developments is pessimistic and demands to the government focus on deferrals of payments rather than direct support (*Mr Dmitry Kolkin – BEROC*).

Concluding remarks

The Deputy Minister expressed gratitude to OECD for the constructive discussion and the opportunity to participate in multilateral dialogue, and reaffirmed the desire for further co-operation.

Annex: List of Participants

Helping SMEs to weather the Covid-19 crisis in the Eastern Partner countries

Registered participants (by country – excluding OECD Secretariat)

Afghanistan			
Ajmal	Ahmady	Minister	Ministry of Industry and Commerce and Office of Senior Advisor to the President in Banking and Finance
Karim	Malikyar	Deputy Minister for Industry and Trade	Ministry of Industry and Commerce
Omar	Hemat	DG-IP and Industry affairs	Ministry of Industry and Commerce
Mariam	Ghaznavi	Director - MSMEs and Consumer Protection	Ministry of Industry and Commerce
Ahmad	Miraj	Deputy Director General	Central Bank
Armenia			
Naira	Margaryan	Deputy Minister	Ministry of Economy
Meri	Mkrtchyan	Assistant to the Deputy Minister	Ministry of Economy
Diana	Sarumova	Director	European Business Association
Arthur	Voskanyan	LED officer	Municipality of Ashtarak
Austria			
Thomas	Buchsbaum	Special Envoy on Eastern Partnership	Federal Ministry for European and International Affairs
Dina	Khvan	Commercial Attachee / Austrian Embassy in Moscow	Austrian Embassy in Moscow, Commercial department
Alina	Zhdanovich	Assistant at the Austrian Embassy in Belarus	Austrian Embassy in Belarus
Azerbaijan			
Rovshan	Najaf	Deputy Minister	Ministry of Economy
Inara	Mustafayeva	Acting Director on Department Cooperation with International Organizations	Ministry of Economy
Suliddin	Mammadov	Second Secretary	Embassy of Azerbaijan in France
Gunel	Rzayeva-Zulfugarova	Third Secretary	Embassy of Azerbaijan in France
Mehman	Abbas	Deputy Chairman	Small and Medium Business Development Agency of the Republic of Azerbaijan
Emil	Ismayilkanov	Head of Strategy and Project Management department	Small and Medium Business Development Agency of the Republic of Azerbaijan
Elmar	Isayev	PPP Development Center, Head of structural unit	Small and Medium Business Development Agency of the Republic of Azerbaijan
Nigar	Bayramli	Deputy Executive Director	German-Azerbaijani Chamber of Commerce
Fabian	Zittlau	Head of Business Services	German-Azerbaijani Chamber of Commerce
Shabnam	Nuriyeva	Executive director	Azerbaijan Entrepreneurs Confederation
Belarus			
Dmitry	Yaroshevich	Deputy Minister	Ministry of Economy of the Republic of Belarus
Irina	Babachenok	Director of the Department of Entrepreneurship	Ministry of Economy of the Republic of Belarus
Andrei	Lobovich	First Deputy Minister	Ministry of Labour and Social Protection
Liudmila	Kastrama	Specialist on marketing	National Agency of Investment and Privatization
Tatyana	Bykova	Director	Entrepreneurship Development Council (Совет по развитию предпринимательства)
Zoya	Zmushko	Director	Entrepreneurship Support Centre "Businesscentre"
Dzmitry	Kolkin	Deputy Head	BEROC - Economic Research Center

Irina	Tochitskaya	Scientific director	IPM Research Center
Canada			
Nathan	Lysons	Trade Commissioner	Embassy of Canada to Kazakhstan
Czech Republic			
Klara	Vacova	Territory Specialist	Ministry of Industry and Trade
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Helena	Cizkova	Deputy Permanent Representative	Permanent Delegation of the Czech Republic to the OECD
Denisa	Provaznikova	Third Secretary	Permanent Delegation of the Czech Republic to the OECD
France			
Daniel-Yves	Taupenas	Permanent Delegate to the External Relations Committee	Permanent Representation of France to the OECD
Amelle	Abdallahi	Project Officer	Permanent Representation of France to the OECD
Tom	Pougnet	Project Officer	AFD French Development Agency
Olivier	Najar	Economist	AFD French Development Agency
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Golvine	De Rochambeau	Assistant Professor	Sciences Po
Georgia			
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Kakha	Demetrashvili	Deputy Chairman	State Procurement Agency of Georgia
Giorgi	Cherkezishvili	Head of Secretariat	Investors Council
Sophie	Panjikidze	Partner	Gvinadze & Partners / ADB Consultant
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Germany			
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Dariko	Gogol	Program Expert	GIZ Georgia
Grekova,	Natalia	Program Expert	GIZ Georgia
Mariam	Chagelishvili	Program Expert	GIZ Georgia
Ekaterina	Meskhidze	Program Expert	GIZ Georgia
Thomas	Förch	Head of project	GIZ Moldova
Mariana	Semenyshyn	Deputy head of Unit	GIZ Ukraine
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Hungary			
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András	Hlács	Counsellor	Permanent Delegation of Hungary to OECD and UNESCO
Israel			
Yaron	Gamburg	Minister-Counsellor	Permanent Delegation of Israel to OECD
Crystal	Baransi	Advisor	Permanent Delegation of Israel to OECD
Kazakhstan			
Yerlan	Khairov	Ambassador	Ministry of Foreign Affairs
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Lithuania			
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Moldova			
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Mongolia			
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Miguel Angel	de Diego	BB	EC
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Turkey			
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Uzbekistan			
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Tatyana	Bystrushkina	Executive Director	American Chamber of Commerce in Uzbekistan
EUROPEAN UNION			
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Lilian	Todter	Desk Officer for Georgia	European Commission
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Youssef	Tadros	Policy Officer	European Commission
Kristi	Raidma	Project Assistant	European Commission
Michaela	Hauf	Team Leader Georgia	European Commission

Marta	Sadel	Policy officer	European Commission
Gintautas	Baranauskas	Deputy Head of Operations	European Commission
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INTERNATIONAL ORGANISATIONS			
Asian Development Bank			
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Madalena	Ferreira	Associate Manager	EBRD
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Anna	Sali	Analyst	EBRD
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Galyna	Beschastna	Analyst	EBRD
Tea	Gamtkitsulashvili	Analyst	EBRD
Alexandra	Sian	Analyst ASB	EBRD
Gaurav	Jain	Intern	EBRD
IBRD			
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International Finance Corporation			
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Pyatachenko	Dmitry	PSDS	International Finance Corporation in Belarus
Viktoryia	Menkova	Coordinator	International Finance Corporation in Belarus
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International Trade Center			
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OSCE			
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UNECE			
Khan	Salehin	Economic Affairs Officer	UNECE
Lyudmyla	Tautiyeva	Associate Economic Affairs Officer	UNECE
World Bank			
Clara	Maghani	Institutional and Regulatory Development Specialist	
Others			
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Magda Ewa	Fitas Dukaczewska	Interpreter	

Supporting Private-Sector Recovery in Central Asia

Registered participants (by country – excluding OECD Secretariat)

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Ghawsodin	Haidari	Director Of Heavy Industries	Ministry of Industry and Commerce
Jawid	Omar	Economic Advisor To Minister Of Economy	Ministry of Economy
Azerbaijan			
Gunel	Rzayeva-Zulfugarova	Third Secretary	Embassy of Azerbaijan in France
Belarus			
Yury	Chebodar	Deputy Minister	Minister of Economy of Belarus
Elena	Kopaneva	Deputy Director Of The Eurasian Integration Department	Ministry of Foreign Affairs of the Republic of Belarus
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Nathan	Lysons	Trade Commissioner	Embassy of Canada to Kazakhstan
Elena	Kucheryaeva	Trade Commissioner	Embassy of Canada to Russia, Armenia and Uzbekistan
Czech Republic			
Jaroslav	Siro	Ambassador	Embassy of the Czech Republic in Uzbekistan

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Iva	Sustakova	Head Of Economic Section /Third Secretary Of Embassy	Embassy of the Czech Republic In Ulaanbaatar, Mongolia
France			
Daniel-Yves	Taupenas	Délégué Permanent Au Comité Des Relations Extérieures	Représentation Permanente de la France auprès de l'OCDE
Finland			
Marja	Liivala	Roving Ambassador For Central Asia, Finland (Tajikistan, Turkmenistan, Uzbekistan)	Ministry for Foreign Affairs of Finland
Georgia			
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Florian	Jäger	First Secretary	German Delegation to the OECD
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Guido	Müntel	Desk Officer Afghanistan	Ministry of Foreign Affairs
Knut	Steinhäuser	Deputy Head of Mission	Embassy of Germany to Tajikistan
Hungary			
Attila	Czuczai	Commercial Attaché	Embassy Of Hungary In Ulaanbaatar, Mongolia
András	Hlács	Counsellor	Permanent Delegation of Hungary to OECD
Israel			
Crystal	Baransi	Advisor	Permanent Delegation of Israel to the OECD
Yaron	Gamburg	Minister-Counselor	Permanent Delegation of Israel to the OECD
Kazakhstan			
Zhaslan	Madiyev	Vice-Minister Of National Economy Of The Republic Of Kazakhstan	Ministry of National Economy of The Republic of Kazakhstan
Chingis	Akhmetov	Acting Director Of Department	Ministry of National Economy of The Republic of Kazakhstan
Yerlan	Khairov	Ambassador	Ministry of Foreign Affairs of the Republic of Kazakhstan
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Chingis	Temir Abdurazakov	Managing Director - Director of the Department of Legal Protection of Entrepreneurs NPP	Atameken
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Lithuania			
Grebliauskas	Darius	Counsellor	Lithuanian Delegation to the OECD
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Mongolia			
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Slovenia			
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Tajikistan			
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Sharaf	Sheralizoda	First Deputy Chairman	
Turkey			
Serkan	Uluylol	Commercial Counsellor	Embassy of Turkey In Ulaanbaatar, Mongolia
Turkmenistan			
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United States			
Laura	Hays	Economic Assistant	US Embassy to Kazakhstan
Uzbekistan			
Shukhrat	Vafaev	Deputy Minister	Minister of Investments and Foreign Trade
Sardor	Rustambayev	Ambassador Of Uzbekistan To France	Embassy of Uzbekistan in France
Aleksey	Sim	Head Of Department	Ministry of Investments and Foreign Trade
Nurilla	Abdushukurov	Senior Specialist	Ministry of Investments and Foreign Trade
Adile	Keshfetdinova	Public Services Agency	Ministry of Justice of Uzbekistan
International Organisations			

Asian Development Bank			
Enrico	Pinali	Deputy Country Director	ADB, Uzbekistan
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Agence Française De Développement			
Axelle	Nos	Responsable Pays Asie Centrale	Agence Française De Développement
Olivier	Najar	Economist	Agence Française De Développement
Council Of Europe			
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DFID			
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EBRD			
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European Union			
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Silvia	Pietro Paolo	Programme Manager EU Delegation To Kazakhstan	EU Delegation to Kazakhstan
Youri	Skaskevitch	Manager Of Regional Programmes	EU Delegation to Kazakhstan
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Raimonds	Vingris	Head Of Political Section	EU Delegation to the Kyrgyz Republic
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Bakyt	Aituganov	Project Officer	EU Delegation to The Kyrgyz Republic
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Laurentiu			
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Evgenia	Faraza	Project Manager	EU Delegation to Mongolia
Francesco	Straniero	Programme Manager	EU Delegation to Tajikistan
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International Trade Center			
Saidmumin	Kamolov	National Programme Manager	International Trade Centre

OSCE			
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Richard	Wheeler	Project Officer Uzbekistan	OSCE
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United Nations			
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Pratibha	Mehta	UNDP Resident Representative	UNDP, Tajikistan
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Other organisations (private sector and civil society)			
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The work of the OECD Eurasia Competitiveness Programme (ECP) in the Eurasia Division, OECD Global Relations takes this opportunity to thank its donors for their ongoing contributions to the work of the Programme. In the current context, these voluntary contributions towards the work of the OECD's ECP reaffirm the need for continued policy dialogue and co-operation across the region and beyond.

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