



2 YEARS OF
MARKUP

ACHIEVEMENTS AND IMPACT

The knowledge and technical guidance that the coach has been offering us through both physical and virtual means has been so beneficial to our business and future outlook

Silvia Achebet
Masha Coffee, Uganda

Two Years in Review

2020 was not a year anyone expected and the MARKUP team did its best during 2020 to support the private sector of the region to cope with this pandemic situation. For MARKUP, building on the successes of the first year of operation was stymied in the second year, though the best was made of a difficult situation and work continued where it could, albeit mostly online. Before the world closed, some key events were held, exposing local growers and traders to new markets and educating SMEs in what they can and need to do to move into the international market with a large focus on the European one. Moving online actually meant more people were available, and technology did allow for sharing, networking and learning. The focus of MARKUP on supporting regional SMEs to overcome the barriers to trade and creating opportunities for export is unchanged. Across all the areas of work – Training, Market Exposure and Advancing the Regional Agenda – many exciting milestones have been reached. To date an overall achievement of 48% of the four year targets has been reached, with the regional window achieving more than 60% of its target. This Two Year Review outlines some of the key successes and obstacles that remain to be addressed. For interventions in the EAC Window, we are now at the critical midpoint and will be taking stock through a Mid Term Review to be conducted in early 2021. With all Implementing Partners now on board, we are confident that MARKUP will be reaching even more SMEs and policy makers to improve export competitiveness in coffee, tea, cocoa, spices, avocados and other horticultural products. We commend the Partner States of Burundi, Kenya, Tanzania, Rwanda and Uganda for the commitment they have shown in ensuring the smooth implementation of the Programme in their respective countries.

European Union / East African Community



Looking Ahead

As we now enter the third year of the MARKUP initiative our focus will be to grow and optimise, and catch up in the areas we have been forced to slow down on this year. One of these areas is the events that we had planned in all the Partner States, to showcase the great work that MARKUP is doing. In 2020 we have modified our plans to take account of the pandemic, and hope to organise a cocoa event in Uganda, and a forum to bring together regional SMEs, Investors, Investment Promotion Agencies and potential investors in early 2021. We will also be producing videos to share some of the achievements and opportunities of MARKUP on our social media and other digital platforms.

We anticipate that some of the key processes that were initiated in the last two years will start to bear fruit in 2021. These include efforts in developing and revising harmonised East African Standards, constructing the Burundi Trade Portal and building consensus on reforms needed to make it easier for SMEs to export coffee and other products. Plus so much more. We welcomed three new Partners to MARKUP in 2020. Solidaridad East Africa, who have started working with farmers, cooperatives, extension staff and policy makers in selected regions in Tanzania to capitalise on voluntary sustainability standards to increase exports of tea, coffee and horticulture. In Rwanda, Oxfam Ireland and ICU are finalising implementation plans to support growers, traders and exporters of coffee and horticultural produce. So in 2021, all seven Partners of MARKUP will be going full steam ahead. It's an exciting time and we are proud of the work done to date!

Programme Coordination Unit

Products in focus

There have been many opportunities, both online and off, for some of MARKUP's key products and the many stakeholders involved in these industries at all levels. Trainings, studies and reports, events before the global lockdowns and online sessions after, all geared towards overcoming the challenges to international trade for local produce.



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SMEs working with
MARKUP



Coffee

MARKUP efforts around coffee have gathered momentum in 2020, ranging across papers and reports, trainings and online tools and beginning with the [EAC Coffee Business Forum](#) held in Mombasa, Kenya in early February 2020. Bringing together 150 stakeholders from across East Africa's coffee value chain to discuss barriers to trade and how to capitalise on current opportunities to be competitive on the international coffee market, the event was jointly organised with the African Fine Coffee Conference & Exhibition and financed by the European Union.

Coffee Trading and Risk Management workshops are being rolled out across the regions after widespread consultation with the industry to ensure the curriculum is relevant and beneficial. Uganda was the first country to deliver the training via the Africa Coffee Academy to local cooperatives and Uganda Coffee Development Authority's staff.

A five-day training for coffee producers in Kenya in November focused on coffee sensory skills, leaving participants with a full understanding of how coffee should taste, smell and look when targeting the specialty coffee market segment, where premium prices can be attained.

In the early months of the COVID-19 pandemic, ITC conducted both an impact assessment and a business survey to evaluate the effects of the crisis on the EAC coffee sector. The assessment's findings pointed to potential issues in demand that could arise in the short term due to major economic shocks in the EAC's main export market – the EU. The results of the business survey echoed the concern for demand shocks in major consumer countries and brought to light challenges related to production, transport and logistics. Six months later, ITC experts on trade facilitation and policy for business updated this study by re-conducting the impact assessment and launching a follow-up survey targeting SMEs in the region. The results of this update shed insightful light on the effects of the prolonged COVID-19 crisis on the EAC coffee sector. Interestingly, it showed the fear of major shocks to demand, as forecasted earlier in the year, did not manifest to the extent estimated, and that the more significant impacts potentially lie on the supply side. To complement this study, ITC produced a set of recommendations for EAC stakeholders to support the coffee sector throughout the continued pandemic. These recommendations will be further discussed with coffee stakeholders at a webinar in early 2021.

Finally, International Coffee Day was celebrated on October 1st with an online forum discussion exploring how the regional coffee value chain could be strengthened to improve value addition and market access in the wake of the challenges posed by the COVID-19 pandemic. MARKUP also participated in a three-day Kahawa Festival in Moshi, Tanzania, where 80 organisations and more than 1,500 visitors enjoyed discussions around the challenges to the industry, as well as a good cup of coffee!



MARKUP Partner Solidaridad celebrating International Coffee Day 2020 at the Kahawa Festival in Moshi, Tanzania

Tea

There are many factors which go towards a product being more competitive on global markets, and in Kenya one area identified in the tea sector is energy efficiency. Tea accounts for 7% of Kenya's exports and is the income source for over 600,000 smallholder farmers. But tea production is very energy dependent, usually taking more than 22% of total production costs, which could be reduced to be made more financially and environmentally sustainable. A webinar series focusing on thermal, electrical and renewable energy, resource efficiency and circular production solutions was very popular and continued efforts are being made to improve the sector.

Other MARKUP initiatives in the tea sector across the EAC have included Packaging and Branding training in Burundi with four tea producers to address the gap in quality identified in that country, and support to 19 tea companies from Kenya and Tanzania to upgrade their marketing skills and materials, including new logos, professional business cards and updated brand guidelines.



4123 people trained on

- EU market requirements
- National quality policies
- Trade and market intelligence tools
 - Access to finance
- Industry certifications & value addition
 - Tariffs and non-tariff barriers



Avocados

Recognised as a "good fat" and a super-food, global demand for avocados has grown by almost 18% since 2014, with Kenya and Tanzania fast becoming important international suppliers to top importers like France, the Netherlands, Spain and the UK. Selling nearly 72,000 tonnes in 2018, Kenya was the top African exporter of fresh avocados and seventh largest exporter globally. While the volume of Tanzania's exports was about 10% of Kenya's, the value increased by 78% between 2014 and 2018. Through ITC, MARKUP has been working with growers, exporters, regulators and policy makers in Kenya and Tanzania to maximise the market potential of fresh avocados. In 2019, a detailed assessment of the demand and supply value chain of avocados from the two countries was undertaken. The study established while there is significant headspace particularly in the EU, consolidated production would enable producers and exporters to have a stronger foothold in current and emerging markets. Other recommendations included continued training and investment to reduce post-harvest losses, targeted promotion and strengthening quality control. Avocado exporters have been linked with quality experts trained through MARKUP, and supported to access finance, investment and markets. MARKUP has also embarked on supporting farmer groups in Rungwe, Mbeya and Njombe in Tanzania on their journey to receiving GLOBALGAP Certification. Following assessment, training, audit and development of action plans, it is anticipated that qualifying farmers will receive the certification in early 2021.



Avocado fruits of the Hass variety grown for international markets

Other Horticulture Produce



In Kenya, MARKUP, through the United Nations Industrial Development Organisation (UNIDO) is supporting SMEs and policy makers to unlock the export potential of a range of fruits, vegetables, oilseeds, herbs and spices. Working in twelve counties since 2019, MARKUP has undertaken several value chain studies to pinpoint the obstacles to market access and identify ways to address them. An assessment of the 288 farmers of french beans in Bungoma, Taita Taveta, Machakos, Kajiado and Trans Nzoia found that only 22% of them were GLOBALGAP certified, which hinders their ability to access lucrative markets particularly in the EU. MARKUP is raising awareness of GLOBALGAP and promoting group certification to make the process more cost effective for the smaller farmers. Other interventions include training in integrated pest management and upgrading traceability system to reflect market needs. A similar approach has been taken to the other vegetables, fruits, oilseeds, herbs and spices. Norah Jeruto Chesherem, owner of Seko Farm in Uasin Gishu County, harvests between 50-100kg of chillies from each greenhouse which she sells locally but is keen to start exporting to the EU, Ghana and Nigeria. Norah faced the challenge of codling moths and aphids that attacked her crops. "We have managed to reduce these pests and ensure quality for both local and export market. I am also growing the garlic, marigold and rosemary to help control some of these pests."



USD 1.8 Million

Loans obtained through Access to Finance support for SMEs



Freshly dug ginger roots and chili powder sold in a local market

Spices

The Tanzania Spices Association (TASPA), government ministries and agencies in the spices sector are all benefiting from close collaboration with MARKUP, with a view to revamping TASPA operations, ensuring knowledge transfer, updating harvesting and processing techniques as well as accessing new markets. Having expanded their portfolio into cinnamon, Mr Darpan Pindolia, director of spice trading company Elven Agri, said "MARKUP helped us connect with our colleagues in Tanzania and access a new pool of resources and expertise. We are working on developing new products and improving value addition in our Dhow Nature Foods Brand by introducing compostable packaging." MARKUP is also now working with a European spices expert on matchmaking between exporters and buyers, plus supporting the establishment of a label for Tanzanian spices to help brand the country's spices sector.

Thyme - The Easy to Grow Herb with a Big Market

Herb farming is slowly but steadily gaining popularity in Kenya, mainly because of the readily available export market. Helped by the country's climatic conditions, various herbs are starting to really take off. Ruth Munyoro, an agronomist who specializes in herb production and international marketing, says thyme is an ideal herb for beginner farmers. "To begin with, this crop is not prone to diseases such as rust and pests such as aphids, thus, it is easy to manage," says Ruth, adding that this means even farmers with no agricultural background can grow it with ease. "Currently, thyme is fetching about KSh 800 per kilogram internationally, with the main market being within the EU." MARKUP Kenya seeks to promote market competitiveness and food safety in the herb and spices sector, and in the wake of the Covid-19, Ruth observes that the demand for herbs, especially thyme, is on the rise.

Cocoa

The East African Standards Taskforce on Coffee, Cocoa and related products held a meeting at the end of 2019 to draft standards for cocoa beans, cocoa butter, cocoa powder & cocoa powder mixtures and chocolate and chocolate products. Following this, National Consultative meetings organised in all the Partner States brought together private and public institutions to consider the draft standards and obtain inputs and comments. In November 2020, the East African Standards Technical Committee (TC) on Coffee, Cocoa and related products met virtually to deliberate on the inputs and comments from all the national consultations. The TC agreed to notify the World Trade Organization (WTO) of the discussed draft standards and circulate them for public review. The TC will meet in 2021 to deliberate on comments from the WTO and the public. If accepted by the TC, the final draft standards will be submitted to the East African Standards Committee for approval and will be adopted across the sectors.



Cocoa pods and beans

New partner Solidaridad hits the ground

Solidaridad has hit the ground running in 2020, introducing MARKUP to farmers and officials alike across Tanzania. Introductory meetings with Ministry of Agriculture, Ministry of Finance and Planning from Tanzania Mainland and Ministry of Agriculture, Natural Resources, Livestock and Fisheries and Ministry of Finance from Zanzibar in July 2020 to present the MARKUP project and approach, also identified areas of synergies with other implementing organizations. Solidaridad will be working in Zanzibar, Mbeya, Njombe, Ruvuma and Songwe districts with a focus on helping farmers comply with sustainability standards in horticulture, tea and coffee as an entry point to high value international markets. The project has also already recruited over 20,000 farmers through their farmer organisations/associations with support from the district cooperative officers who have been useful in introducing the project to the farmer organisations.

Solidaridad

Quality Champions

Quality Champions are technical experts from the public and private sectors in Burundi, Kenya, Rwanda, Tanzania and Uganda trained by the International Trade Centre (ITC), who act as mentors in their countries. Many agro-exporters from East Africa have tremendous export potential, but their lack of expertise and knowledge of regulations, market requirements and quality standards often get in the way of accessing international markets. Not being able to access credible sources of information is another impediment to reaching international buyers. From recommendations on improving quality processes and hands-on support on data collection to designing and implementing standardised operation processes, Quality Champions work with companies to provide long-lasting solutions. During the past year much of the Quality Champion work moved online, still providing expertise and advise and barely missing a beat on training.

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Private Sector
representatives working
with MARKUP

The Quality champions program has been to us a great pillar toward success! The program through the Quality Champions coaching and discussion sessions helped us to assess our gaps in our processes and to develop the Standard Operating Procedures to tackle those gaps! The program also identified key quality control points within our system. We can testify that the program raised the quality of our produce and brought the uniformity.
Bernard Uwitije, M.D Trapro Coffee Washing Stations Ltd, Rwanda

The best part of the QC initiative has been seeing our cupping score improve from 76 to 85 by just improving our internal processes to focus on specialty arabica coffee, and we hope to do more and improve further as these were the first samples from the improved processes. The new goal is 90+, hopefully next season.
Silvia Achebet, Masha Coffee, Uganda



The MARKUP Quality Champions



Standards and Quality Improvement

In 2019, MARKUP – through GIZ – conducted a standards capacity gaps assessment in Burundi, Kenya, Rwanda, Tanzania and Uganda which established that one of the obstacles to effective development of harmonised standards in the region was the lack of sufficient knowledge and absence of key reference materials. MARKUP has now developed a training manual – validated in July 2020 – comprising basic elements on standards development and harmonisation, drawing heavily on the 2016 EAC Principles and Procedures for harmonisation of standards, as well as other international guidelines. It will now be rolled out to national standards bodies, food safety regulatory agencies, relevant officers from ministries responsible for agriculture, trade and health, private sector organisations, as well as non-state actors such as research institutions and consumer groups.

EAC adopts harmonised criteria for food products

The food trade across borders in the EAC is particularly hampered by non-tariff barriers (NTBs). Each of the six EAC Partner States have different regulations and procedures for enforcement of standards for foods, especially pre-packaged foods. In a great milestone for intra-regional trade, this year the East African Standards Committee developed and adopted harmonised criteria for the registration and certification of pre-packaged food. The Standards Committee also developed a roadmap for the implementation of the framework, including the harmonised registration and certification of pre-packaged foods. The criteria now include detailed harmonised approaches to registration and certification for three types of pre-packaged food.

Quality management systems and product certification schemes

In June 2020, MARKUP conducted a capacity building exercise on ISO 17020 for selected inspection bodies working in the tea and coffee sector in Burundi followed by an auto-evaluation process. The auto-evaluation is based on the requirements of ISO 17020 and helps develop a road map for strengthening the inspection bodies before final accreditation. The virtual assessment of the French Accreditation Committee (COFRAC) was administered to The Burundi Bureau of Standards and Quality Control (BBN), The Plant Protection Directorate (DPV), and The Office for the Development of Coffee (ODECA).

A Swahili translation of a key standards document – the checklist for the GLOBAL G.A.P. Integrated Farm Assurance (IFA) standard vS. – makes the technical requirements more accessible to smallholders in Tanzania, Kenya and Uganda with limited English and empowers them to aim for the standards without the need for outside consultation.

Beginning work on standards required an initial review of the current state of play, and setting a baseline from which intervention could be formulated and acted on. This new manual now allows us to steer the process of standards harmonisation in the region, and to strengthen compliance among the private sector operators.

Dr. Martin Kimanya
MARKUP Standards Expert


GLOBAL G.A.P. UPDATE:
IFA CHECKLIST
NOW AVAILABLE IN SWAHILI

Unifying Food Safety Controls

Kenya has developed a vibrant agri-food industry, with some remarkable international trade successes, but the development of the Sanitary and Phytosanitary (SPS) control system has not kept pace. This was one of the findings of a review of food safety controls in Kenya conducted by MARKUP through UNIDO in May 2020. Crucially, the review did find that the country has a strong institutional framework for the regulation of pesticides and other agro-chemical inputs, which goes a long way to protecting the health and safety of consumers. Like many developing countries, Kenya has a complicated multi-agency system of ministries, departments, and agency bodies responsible for inspection and enforcement. At a workshop held in July 2020, stakeholders discussed the proposal for the country to move towards the creation of a unitary food safety competent authority as the only body empowered to promote or adopt regulations concerning food safety. Other proposals under consideration by authorities include the development of a new framework food safety law and, incorporating local government authorities in the institutional set up for food safety control.

**24 additional
product-specific
procedure guides**

covered by national and regional
trade facilitation portals

Improving Competitiveness

Many key international trade events were unfortunately cancelled in 2020, however MARKUP did still arrange for SME representatives to attend and benefit from the international trade fairs that did still run, exposing local growers and exporters to networking opportunities, meetings with potential buyers and investors, and simply seeing how the fairs operate for business.



Deputy Minister of Agriculture of Tanzania, Hon. Anthony Mavunde, visiting the MARKUP Booth at the Nanenane Fair 2020

Notable events where MARKUP arranged EAC attendees were:

Food Ingredients Europe and Natural Ingredients -

Five Tanzanian SMEs participated in one of the world's leading trade fairs - the Food Ingredients Europe and Natural Ingredients (Fi Europe & Ni) in Paris, where they met with potential buyers and presented a range of African spices. The exporters attended around 100 business meetings, returning home with 20 concrete business leads with an aggregate value of up to USD 1.75 million.

Fruit Logistica - Avocado exporters from Kenya and Tanzania travelled to Berlin in early February 2020 for the Fruit Logistica fresh produce trade fair, meeting potential buyers and experiencing the latest innovations, products and services at every link in the international supply chain.

Nane Nane and Saba Saba - Two large agricultural events were held in Tanzania in late 2020, where MARKUP had stands which featured the regional work, publications and reports and information for

interested SME's, and drew a lot of interest from farmers and government representatives alike.

United Fresh Live became an online event in June 2020, with EAC produces getting involved especially in the avocado and fresh produce interactions. A virtual B2B event continued until September, where deals were done and skills picked up.

One stop shop for market information

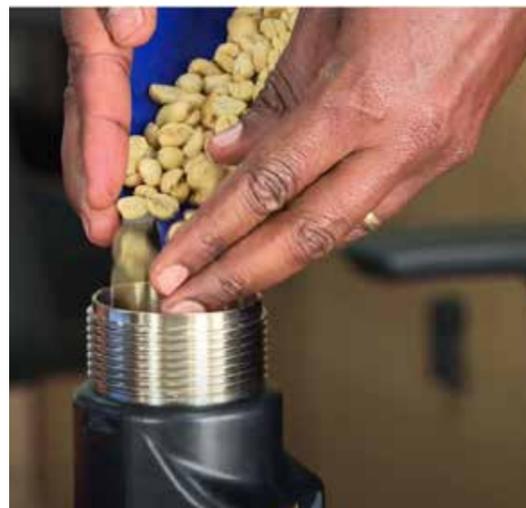
One significant highlight in 2020 which has already been helping SME's across the region was the launch of the [EAC Quality for Trade Portal](#) as a one-stop shop for information about quality regulations, standards and buyer requirement. Two modules of the Portal were launched in 2020. The Quality Compass, which offers users guidance on quality-related issues for specific products in selected markets has been live since February 2020. Launched in June 2020, the second module - Quality Connect (<https://un-consulting.ch/eac/connect>) - builds on the quality requirements by linking users to a regional network of quality experts, including the Quality Champions trained under MARKUP. Through this portal, institutional and individual quality experts from across the region are available to offer advice and support on quality related challenges that SMEs may face for specific products and markets.

Since the launch of the EAC Quality for Trade platform, 114 users have registered on the platform. Profiles of the 23 of the MARKUP-trained Quality Champions have been posted on the portal and users can connect with them through the Quality Connect tool. MARKUP has performed demonstrations of how to use the portals at key national fairs in Tanzania as well as virtually. The EAC Quality for Trade Platform has also been successfully linked to the EAC Regional Trade Portal and with the national trade information portals of Kenya, Uganda, Rwanda, and Tanzania. The linkage ensures that SMEs have seamless access to import and export requirements as well as quality, standards and buyer requirements in export markets.

101 Trade Support Institutions working with MARKUP

Moisture Metres

Understanding that moisture content can be the difference between a good and poor-quality product and therefore sales or rejection, ITC through MARKUP distributed in September portable Draminski moisture meters among coffee SMEs and cooperatives across the EAC and cocoa companies in Uganda. In collaboration with the Uganda Coffee Development Authority (UCDA), 43 moisture metres were distributed among selected coffee and cocoa SMEs by Dr. Iyamulemye, Managing Director of UCDA, while in Kenya, moisture metres were also distributed by the Director General of Kenya's Agriculture and Food Authority, Mr. Anthony Muriithi.



Addressing barriers to intra-regional trade

A Regional Draft Paper on Trade Obstacles in the Coffee Sector has been prepared following a webinar for focal points of EAC Coffee Business Management Organisations (BMOs) in July 2020, with the objective of exchanging views on the regional advocacy approach. With input from coffee sector BMOs including InterCafé (Burundi), Kenya Coffee Traders Association (KCTA), Coffee Exporters & Processors Association of Rwanda (CEPAR), Tanzania Coffee Association (TCA) and Uganda Coffee Federation (UCF) and national ITC coordinators, the Regional Obstacle Paper addresses among others issues specific trade information gaps, issues on quality and SPS measures, monitoring mechanisms and joint regional initiatives.

Business development capacities

Despite restraints on face to face meetings and trainings this year, a huge number of trainings and mentorships still occurred across the MARKUP portfolio. Topics included EU market requirements, business advocacy, National Quality policy, business development strategies, trade and market intelligence tool, access to finance, industry certifications & value addition, sensitisation on tariff and non-tariff barriers and marketing and packaging. All geared towards helping companies reach the quality and standards to be competitive globally.

One example was the Access to Finance training, which is recognised by MARKUP as an important area of development to grow businesses. In early November 2020, MARKUP in Uganda ran an in-person and virtual Access to Finance bootcamp with ITC and Transformational Business Network East Africa (TBNEA), which included sessions around the basics for investment readiness for entrepreneurs as well as live pitch sessions to help gain real life experience in securing financing. Later in November a three-day webinar aimed at supporting Business Support Organisations (BSOs) from East Africa develop their products and services to support SME's in accessing finance was also held through a collaboration between ITC and the Singapore Cooperation Enterprise.

1270 women trained



USD 9.2 Million
Value of Transactions through Business to Business (B2B) meetings for SMEs



Programme Management

The last two years have seen strong engagement with the key oversight bodies of MARKUP. Three Regional Steering Committee meetings have been held and Partner States, the EU Delegation, private sector apex organisations and Implementing Partners and the EAC Secretariat have reviewed implementation of the Programme and dealt with issues that have emerged along the way. National Steering Committees have been established and are functional in all the Partner States, and the Regional Technical Committee continues to meet every 1-2 months. Strong partnerships are at the core of MARKUP and we are proud of the road we have travelled together so far.

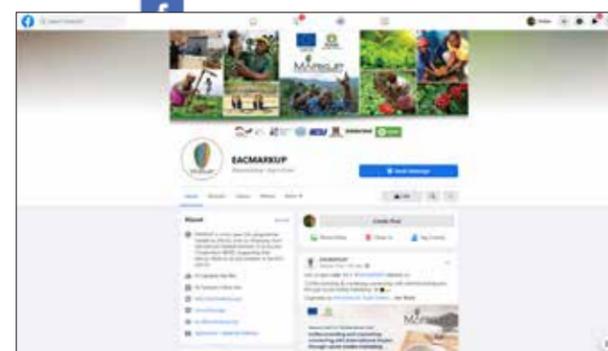
Communicating MARKUP

Reaching SMEs and stakeholders across the MARKUP product value chains continues to be a priority, with the introduction of a new Facebook channel and a quarterly newsletter in 2020. As trainings and meetings went online, MARKUP also held live streamed educational events and panel discussions on topics including "Tanzania's trade performance during times of COVID-19. An analysis for the avocado, coffee, spices and tea sectors" with the Tanzania Trade Development Authority, "World Standard's Day – Protecting the World with Standards", and with the East African Business Council "Building Regional Value Chains in the EAC in the fruits and vegetables and leather sectors."

Online information campaigns also ran in Kenya in collaboration with the Kenya Trade Network Agency (KenTrade for Kenya's Trade Facilitation Portal, InfoTradeKE, from August to October 2020. The campaign promoted trade portals on social media to reach broader audiences and was also rolled out across other EAC Partner States.

Another tool developed to benefit regional coffee growers has been the Social Media guide for coffee SMEs. Social platforms are vital tools for businesses to connect with customers and new potential clients around the world but can be challenging to break through on. This interactive guide provides an opportunity for specialty coffee exporters to learn how to build online presence and showcase their products plus grow their audiences.

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MARKUP Partners and Products

EAC Regional Window		
Region	Partner	Area of work
EAC 	GIZ 	Improved harmonisation of standards
	ITC 	SME capacity development initiatives
Partner States		
Country	Partner	Product
Burundi 	ITC 	Coffee Tea Horticulture
Kenya 	UNIDO 	Coffee Tea Avocado Horticulture
Rwanda 	OXFAM 	Horticulture
	ICU 	Coffee
Tanzania 	ITC 	Coffee Tea Avocado Spices Horticulture
	Solidaridad 	
Uganda 	UCDA 	Coffee Cocoa



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