# Serbia Competitive Agriculture Project (SCAP) Terms of Reference

**Technical Assistance for the Development of a Sectoral Policy and Competitiveness Analysis of the Livestock Sector in Serbia**

# Background

The Serbia Competitive Agriculture Project (SCAP), a US$50 million investment, was approved by the World Bank in December 2019 and ratified by the National Assembly of the Republic of Serbia in February 2020. The Project is implemented by the Ministry of Agriculture, Forestry and Water Management (MAFWM) through the SCAP Project Management Team (PMT). The objective of the Project is to improve access to markets and information systems for agricultural producers in Serbia. This will be achieved through a) improving productivity of small and medium scale farmers by strengthening advisory and technical support; b) supporting market access of small and medium scale farmers (including finance and business planning capacity); c) improving government systems to strengthen the enabling environment for all agricultural producers (including capacity building for the Ministry, information systems, and data platform).

The Project will provide financial and technical support to all productive investments in agriculture in Serbia through the national rural development program[[1]](#footnote-2) and will not finance direct payments (subsidies). This delimits the scope of Project interventions outside of all IPARD (Instrument for Pre-Accession Assistance for Rural Development) measures that the country has been accredited for or plans to be accredited for and puts it in the center of national rural development program.

Beneficiaries: Small and medium scale agricultural production units (including producers, producer groups, agribusinesses/agro-processors that can provide direct link to smallholder farmers) that has or can have commercial focus and are not covered by accredited IPARD measures. Although large producers will not be directly targeted, the project will also benefit them with the enabling environment it will create through the improvements in information systems and the financial services provided. Small and medium-scale producers are defined by the economic size of holding expressed in euros of standard output. For the purposes of this project and the context of Serbia, small producers are those with an economic size of up to EUR 8,000; medium producers are those with an economic size between EUR 8,000 and 25,000.

Project Description: The Project activities are structured into three Components. Component 1) will focus on improving the productive and entrepreneurial capacity of small and medium farmers by supporting business and financial planning for productive investments, as well as supporting market access and strengthening sector competitiveness. Component 2) will focus on improving the capacity of the MAFWM to provide core public goods for improving sector performance. This includes establishing and information system aligned with EU Common Agricultural Policy (CAP) requirements to enable evidence- based policy making and monitoring of results, enhance market information for stakeholders and build capacity for regulatory roles aligned with EU CAP. Component 3) will focus on project management.

By addressing sector needs at the level of producers (Component 1) and the MAFWM (Component 2), the Project will support a broader policy reform process in the agriculture sector through: i) improved targeting of policy instruments to different typologies of producers, ii) strengthened enabling environment for investment for small and medium agricultural producers, by improving the delivery of services to these productive segments (advisory, financial, information, etc.), iii) improving the monitoring of public resources and their utilization, as well as sector performance. It is expected that this will bring about a significant shift in the utilization of public resources in agriculture from subsidies (direct payments) to rural development investments.

# 2. Rationale

# The livestock sector represents one of the key pillars of Serbia’s rural economy, contributing significantly to employment, food security, and agricultural output. However, despite its importance, the sector faces persistent structural and market challenges. These include low production intensity, limited market integration, outdated technologies, and restricted access to investment and innovation for small and medium-scale producers.

These constraints limit the sector's ability to contribute to Serbia’s broader agricultural competitiveness and to align with evolving international standards and consumer demands. Moreover, the fragmented nature of the value chains, insufficient support services, and the absence of a comprehensive sectoral strategy limit the potential for sustainable growth and value-added production.

Recognizing these challenges, the MAFWM seeks to support the development of a coherent, evidence-based policy framework for the livestock sector as an input to the ongoing Agricultural Strategy and the subsequent National Programs for Agriculture and Rural Development. The analytical outputs and recommendations generated through this assignment are expected to inform these overarching policy instruments, in line with the framework defined by the Law on Agriculture and Rural Development. This will help ensure enhanced productivity and value addition, improved market linkages, and increased resilience of small and medium producers.

Aligned with the objectives of the SCAP, this technical assistance will provide critical inputs for designing strategic interventions that promote sustainable livestock development, strengthen institutional capacity, and guide public investments toward priority areas of impact. The outcomes of this consultancy will directly contribute to Serbia’s agricultural reform agenda and its EU accession goals, while supporting the long-term transformation of the livestock sector into a competitive and resilient component of the national economy.

# 3. Objective of the Assignment

**General Objective**

The overall objective of this assignment is to provide targeted technical assistance and a comprehensive analysis of the competitiveness of the livestock sector in Serbia, **which will serve as an input for the development of strategic policy directions and evidence-based planning within the framework of the Agricultural Strategy and the National Programs for Agriculture and Rural Development.** as a foundation for developing strategic directions that enhance market integration, production modernization, and long-term sector resilience. The assignment aims to identify practical measures and priority areas for intervention that can support the transformation of livestock production into a more productive, competitive, sustainable, and market-oriented segment of Serbian agriculture. Special emphasis will be placed on small and medium-scale producers (including women and youth), their access to services, and their inclusion in domestic and international value chains, in alignment with the objectives of the SCAP and national rural development priorities.

# Specific Objectives

To achieve this goal, the consultancy will pursue the following specific objectives:

* **Comprehensive Overview of the Livestock Sector**: To develop a clear understanding of the current structure, dynamics, and performance of the livestock sector in Serbia, including key production systems, geographical distribution, and the role of livestock in rural livelihoods and national agricultural output.
* **Competitiveness Assessment**: To evaluate the competitiveness of livestock production and processing in Serbia at national and international levels, focusing on production efficiency, adoption of climate-smart and sustainable technologies and practices, cost structures, productivity indicators, genetic improvements, and input optimization. The assessment will also examine value creation and differentiation, animal health and welfare, food safety standards, environmental impact (including emission reduction potential), and public sector service delivery in support of these areas. Furthermore, it will assess the compliance capacity of producers with EU and other international quality and safety standards, as well as the integration of financial services (including public subsidies and private financing instruments) and their role in enabling sectoral transformation and improved performance. The competitiveness assessment will be informed by internationally recognized models and benchmarking tools where applicable (e.g., InterPIG for the pork sector, and other sector-specific frameworks), using relevant performance indicators and comparative datasets to ensure robust, evidence-based analysis. The findings will be used to propose specific, evidence-based policy actions that can enhance the competitiveness and sustainability of the Serbian livestock sector.
* **Market Integration and Value Chain Mapping**: To assess the level of integration of Serbian livestock producers into domestic and export value chains, identifying bottlenecks in processing, logistics, standards compliance, and access to market information and services. The assessment will also consider the availability, timeliness, and quality of public and private support services - such as laboratories, technical assistance, certifications, and permits - related to animal health, food safety, and environmental compliance.
* **Review of Innovation and Sustainability Practices**: To examine the adoption of modern and more sustainable production techniques, animal health and welfare standards, environmental sustainability practices, and digital solutions within the sector, with a view to identifying gaps and opportunities for improvement.
* **Assessment of Public and Private Support Mechanisms**: To review the effectiveness and reach of existing support services, including advisory systems, veterinary services, financial instruments, and training programs available to livestock producers and processors. The assessment will also examine the effectiveness, efficiency, and allocation of budgetary support to the livestock sector, given its significant share in the MAFWM budget.
* **Strategic and Operational Recommendations**: To formulate a set of actionable recommendations for stakeholders—particularly the Ministry of Agriculture, Forestry and Water Management—on how to support sector modernization, foster competitiveness, improve value chain performance, and enhance the resilience of small and medium-scale producers. These recommendations will serve as a foundation for potential development of a livestock sector strategy or incorporation into broader national policy and programming documents, depending on government priorities and alignment with ongoing strategic planning processes.

The assignment will deliver practical, evidence-based outputs that contribute to a more competitive, sustainable, and market-oriented livestock sector, while also supporting Serbia’s EU accession objectives and the implementation of SCAP interventions.

# 4. Scope of Services

The consultancy will provide targeted technical assistance and analytical support to assess the competitiveness and development potential of the livestock sector in Serbia. The work will focus on generating actionable insights and strategic recommendations to guide future interventions and strengthen the sector’s capacity for sustainable growth and market integration.

The scope of services will include, but not be limited to, the following key tasks:

1. **Livestock Sector Analysis**: Conduct a comprehensive review of the historical development and current structure of the livestock sector in Serbia. This includes production systems, animal types and numbers, regional characteristics, and an overview of the institutional and regulatory framework governing the sector.
2. **Market and Value Chain Assessment**: Overview of the key livestock value chains in Serbia (milk, meat, and processed products), focusing on the general structure, key actors, and typical product flows. Using available secondary data and existing studies, the consultancy will identify major trends in production and trade, highlight common challenges related to quality standards and market access, and outline the role of domestic demand and export orientation in shaping sector dynamics.
3. **Identification of Serbia’s Comparative Advantages**: Assess Serbia’s competitive position in the livestock sector using selected quantitative indicators, such as revealed comparative advantage (RCA) in international trade and market concentration metrics (e.g., HHI), with reference to available data on production, trade flows, and market structure.
4. **Review of International Good Practices**: Identify and summarize selected international experiences and successful practices relevant to the sustainable development of the livestock sector, particularly those that offer practical and transferable solutions which may be applicable or beneficial in the Serbian context.
5. **Strategic Development Recommendations**: Formulate strategic recommendations for strengthening the sector. These may include policy adjustments, institutional improvements, investment incentives, access to finance, digitalization, education, and advisory services to support sustainable growth.
6. **Action Plan Development**: Design a detailed action plan with clearly defined interventions, responsible actors, indicative timelines, and monitoring indicators to support implementation of proposed strategies.
7. **Monitoring and Evaluation Framework**: Propose an indicative monitoring and evaluation (M&E) system to track the effectiveness and impact of the recommended measures, aligned with SCAP’s broader results framework.

The consultancy will primarily rely on desk-based analysis using available secondary data and relevant literature. Where appropriate, complementary insights may be drawn from stakeholder consultations and previously conducted assessments.

# 5. Deliverables

For the technical assistance on the livestock sector in Serbia, the consultancy will be expected to produce the following deliverables:

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| DELIVERABLE NUMBER | DESCRIPTION | DUE DATES |
| Deliverable 1 | First Progress Report:Provides a comprehensive overview of the livestock sector in Serbia, including its historical development, production systems and structure, geographical distribution, and the institutional and regulatory context. The report will also present an initial analysis of competitiveness, examining key challenges such as productivity levels, cost structures, access to services, and alignment with sustainability and animal welfare standards. | Up to 3 months after signing the contract. |
| Deliverable 2 | Second Progress Report:Presents a detailed assessment of market developments and value chain characteristics, including trade patterns, bottlenecks in market integration, compliance with standards, and access to support services. The report will also outline selected international good practices relevant to Serbia’s livestock context, as well as preliminary findings on innovation uptake and the role of support mechanisms across the sector. | Up to 5 months after signing the contract. |
| Deliverable 3 | Third Progress Report:Provides a consolidated analysis of the livestock sector and presents final strategic and operational recommendations. The report includes a prioritized set of policy actions, an indicative action plan with proposed interventions and responsible institutions, and a monitoring and evaluation framework aligned with SCAP and national strategic goals. | Up to 8 months after signing the contract. |

Each deliverable will be provided in both electronic form and hard copy, with one original and two copies furnished.

During the contract term, the Project Coordinator or Team may request modifications or additions to the deliverables. If any of the deliverables are deemed non-compliant with the contractual terms, they may be rejected, and the consultant will be required to provide the necessary corrections or replacements at no additional cost.

# 6. Reporting

The Consultant will report to the SCAP Project Coordinator, who oversees the Project Management Team (PMT) that has been established to support project implementation. The Consultant shall be responsible for providing information (inputs) and advice as requested by the SCAP Project Coordinator for the satisfactory implementation of project activities related to this Consultancy.

All submission of written reports must be in both Serbian and English. Results are to be provided in both languages as well. Submissions should be sent electronically via email and in two printed copies for the approval of the Ministry of Agriculture, Forestry and Water Management (MAFWM). All deliverables shall be submitted to and approved by the Project coordinator. Approval of these deliverables will allow payment for each of the Deliverables. Approval of deliverables will trigger payment, which will be based on the acceptance of outputs and results.

The Consultant is expected to perform the assignment from its own working space. If necessary, participation in selected meetings at the Project Implementation Unit’s premises may be requested. The Client will provide access to relevant documentation, data, and stakeholders required to carry out the analysis, in accordance with applicable confidentiality provisions.

The contract duration will extend beyond the deadline for submission of the final deliverable to allow sufficient time for review, feedback, and final approval by the Client.

# 7. Other requirements

The Consultant is obliged to perform consulting services in accordance with the applicable Serbian legislation and wide-known technical norms and rules of the profession and in accordance with the requirements defined in this ToR. Intellectual property rights policy will be applied in accordance to the proper sections of the Contract.

# 8. Engagement

Type of Contract: The contracting will be done through a lump-sum consultancy contract with product delivery.

Duration of Contract: The duration of the contract will be up to 240 calendar days from its signing.

# 9. Experience and Qualifications Requirements

To be considered for the consultancy on the Technical Assistance for the Livestock Sector in Serbia, the the qualified consulting company or a joint venture (Consultant) must meet the the **following mandatory minimum qualifications:**

* The Consultant must have the experience with carrying out complex assignments that require organizational, personnel, and administrative capacity, including appropriate infrastructure and resource availability.
* The Consultant must have the experience in managing and implementing projects financed by international donors (e.g. World Bank, EU, UN agencies, bilateral donors, or related).
* The Consultant must have at least 12 years of experience in the fields of agriculture and rural development, climate change, circular economy, disaster and risk management, or technical assistance to national and local governments.
* The Consultant must have implemented at least three projects that included functional analysis, sector assessments, or development of strategic recommendations in the field of public policy.
* The Consultant must have experience in participatory, consultative, and multisectoral approaches in policy and strategy development.
* Experience in implementing similar assignments in Serbia and/or the Western Balkans over the last 10 years, is an asset.
* Experience with livestock sector policy development, competitiveness analysis, or rural development strategies is an asset.
* Experience in application of internationally recognized tools and methodologies for policy analysis, institutional assessment, and strategic planning, is an asset.
* Prior engagement in World Bank-financed assignments, is an asset.
* Experience in working with public sector institutions relevant to agriculture and rural development is an asset.
* Experience in stakeholder facilitation and institutional coordination in multisectoral projects, is an asset.
* Experience in integrating environmental, climate-smart, or sustainability dimensions into agricultural and rural policy assessments, is an asset.

Consultant shall NOT submit CVs of key staff in its Expression of Interest. In the EoI phase, CVs of the proposed Key personnel shall not be submitted as these are not a subject to evaluation.

The Consultant shall provide team of experts covering the following requirements:

**Key Experts Requirements**

**Key Expert 1 – Team Leader**

* Minimum Master’s degree in agricultural sciences, agroeconomy, rural development or related *(PhD degree is preferred)*, with expertise in production systems, policy planning, and organizational models in agriculture.
* Minimum 10 years of experience in the agriculture and rural development sectors, including participation in the design and implementation of strategic frameworks, sectoral assessments, and/or institutional support programs, or similar.
* Experience in projects related to agricultural competitiveness, modernization of production systems (including livestock), and/or rural development, or related.
* Expertise in agricultural policy analysis, including contributions to the development and evaluation of strategies and/or policy documents, or related, as well as the use of analytical tools (e.g., cost-benefit analysis, input-output models, multi-criteria analysis, benchmarking, policy simulation tools) for evidence-based planning and decision-making.
* Experience in digital data systems, monitoring frameworks, and/or advisory service models is considered an asset.
* Experience in leading or coordinating multidisciplinary teams (typically involving 4–10 experts) and implementing capacity-building activities for public institutions, advisory services, rural stakeholders, or related.
* Experience in EU-funded initiatives and cooperation frameworks supporting innovation and institutional development is an asset.
* Authorship or co-authorship of publications in the areas of agroeconomy, production organization, and/or sectoral analysis, or related, is an asset.
* Experience in delivering or participating in national or international training sessions, expert workshops, or policy-related events (typically involving 15–50 participants) focused on agricultural competitiveness, rural development, or sector reforms is an asset.
* Fluency in English and Serbian.

**Key Expert 2 – Senior Livestock Sector Specialist**

* PhD in biotechnical or animal sciences (or a related discipline), with academic and applied expertise in livestock breeding, production systems, and/or animal genetics, or related.
* Minimum 10 years of progressive professional experience in livestock development, including work on breeding strategies, animal genetic resources, animal health, and/or sustainable livestock systems, or related.
* Experience in supporting or advising institutional and regulatory systems related to the livestock sector, including work with national ministries, academic institutions, and/or international projects, or related.
* Experience in the development and implementation of breeding programs for both commercial and autochthonous livestock populations, with strong focus on sustainable development, food security, and/or rural livelihoods, or related.
* Experience in engaging and training diverse stakeholder groups, including farmers, extension workers, breeder associations, and/or academic communities, or related.
* Participation in internationally funded projects (e.g., UNDP, EU/IPA, TEMPUS, GCF) focused on livestock policy, sectoral innovation, and/or system optimization, or related.
* Author or co-author of publications, including peer-reviewed articles in international journals (SCI-listed), addressing key livestock production, sustainability, and/or breeding topics, or related.
* Experience with international training and exchange programs (e.g., USA, Italy, Spain) in advanced livestock technologies and sector safety, is an asset.
* Fluency in English and Serbian.

**Key Expert 3 – Senior Agricultural Economist / Competitiveness Expert**

* PhD in Agricultural Economics, Development Economics, or related discipline, with specialization in agri-food systems, competitiveness, rural development, or related.
* Minimum 15 years of professional experience in agricultural economics, including strategic planning, policy research, and/or implementation of evidence-based public policy interventions, or related.
* Expertise in the design and application of analytical tools (e.g., DEA, cluster analysis, Malmquist index, Input-Output models, panel econometrics) for policy evaluation and sector competitiveness assessment.
* Experience in the development and evaluation of national and EU-funded agricultural and rural development programs, e.g. CAP reforms, supply chain efficiency, rural employment policy impacts, or related.
* Experience in international projects including collaboration with research institutions, public authorities, ministries on agri-food policy, and related.
* Experience with being a lead or co-author of publications in domestic/international journals, with emphasis on competitiveness, productivity, rural development, food policy, and related, is an asset.
* Experience in mentoring and capacity building, typically involving small to medium-sized groups (e.g., 10–30 participants or auditors, or similar), through teaching MSc/PhD students, international training, advisory roles for ministries and regional authorities, or related, is an asset.
* Experience with European agricultural policy networks, with regular contributions to conferences and expert panels, is an asset.
* Experience with the EU agricultural policy framework, market dynamics, and competitiveness issues, is an asset.
* Experience with economic and policy analysis tools relevant to competitiveness assessment and market research, such as cost-benefit analysis, supply chain mapping, policy simulation models, benchmarking frameworks, productivity metrics (e.g., TFP, partial factor productivity) or related, is an asset.
* Fluency in English is mandatory; additional fluency in Serbian is an asset.

**Key Expert 4– Value Chain and Market Access Specialist**

* Minimum Bachelor’s degree in agricultural economics, agribusiness, economics, or related social science or technical field; higher educational (MsC) grade preferred.
* Minimum 5 years of professional experience in the analysis and development of food value chains and/or agri-food market systems, or related.
* Experience in research on supply chain structures, market conditions, and/or related field.
* Experience in providing analytical inputs and/or technical assistance in projects related to agri-food competitiveness, value addition and differentiation, market resilience, export readiness, or related.
* Experience working in the Western Balkans and/or countries with similar socio-economic and institutional contexts is an asset.
* Experience in supporting public and/or private actors in the identification of market opportunities, trade-related challenges, and investment priorities is an asset.
* Fluency in English and Serbian.

**Key Expert 5- Rural Institutions and Advisory Systems Specialist**

* Minimum Bachelor’s degree in agricultural economics, economics, social sciences, public administration, or another related field; higher educational grade (MsC) preferred.
* Minimum 5 years of professional experience in rural development, agricultural institutions, public support systems in agriculture, or related.
* Experience in institutional capacity building, policy support, strengthening of rural service delivery mechanisms, or related.
* Experience in working with national and/or local institutions, stakeholders, and civil society in participatory and inclusive processes.
* Experience in projects addressing rural livelihoods, poverty reduction, and/or social inclusion in the context of agricultural and rural policy, or related, is an asset.
* Experience in analyzing and/or supporting the development of market-oriented cooperatives, advisory services for agribusiness development, and other forms of rural organization is an asset.
* Fluency in English and Serbian.

# 10. Confidentiality Statement

All data and information received from MAFWM/DAP/PMT/WB for the purpose of this assignment are to be treated confidentially and are only to be used in connection with the execution of these Terms of Reference.

All intellectual property rights arising from the execution of these Terms of Reference are assigned to MAFWM/DAP. The contents of written materials obtained and used in this assignment may not be disclosed to any third parties without the expressed advance written authorization of MAFWM/DAP.

# Selection

The Consultant will be selected in accordance with Consultant’s Qualification Selection (CQS) method set out in the World Bank’s Procurement Regulations for IPF Borrowers – Procurement in Investment Project Financing Goods, Works, Non-Consulting and Consulting Services, July 2016, revised November 2017, August 2018.

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| Consultant’s general experience | 40 points |
| Consultant’s specific experience of relevance for the assignment | 60 points |

 total: 100 points

1. In 2018, the program received 8,000 applications from small and medium scale producers. [↑](#footnote-ref-2)