# Serbia Competitive Agriculture Project (SCAP) Terms of Reference

# Technical Assistance for the Development of a Sectoral Policy Framework for the Soft Fruit 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 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-1) and will not finance direct payments (subsidies). This delimits the scope of Project interventions outside of all IPARD 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 size 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 Ministry of Agriculture, Forestry and Water Management (MAFWM) to provide core public goods for improving sector performance. This includes establishing and information system aligned with EU 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 soft fruit sector, particularly raspberries and blueberries, represents a key segment of Serbia’s agricultural economy, with significant export potential and an established reputation in global markets. However, recent market fluctuations, challenges in supply chain efficiency, and increasing competition from other producing countries necessitate a strategic, policy-driven approach to ensure the sector's long-term sustainability and growth. The Ministry of Agriculture, Forestry, and Water Management (MAFWM) recognizes the need for a structured, evidence-based sectoral policy that strengthens market access, improves production efficiency, and aligns Serbia’s agricultural framework with best international practices. This consultancy will provide targeted technical assistance to develop a sectoral policy framework, enabling the Ministry to formulate effective support mechanisms that enhance the competitiveness of Serbian soft fruit producers, particularly small and medium-scale farmers.

# The Serbia Competitive Agriculture Project (SCAP), financed by the World Bank, aims to improve access to markets and strengthen the enabling environment for agricultural producers. This consultancy is fully aligned with SCAP’s objectives, as it will focus on removing barriers to market entry, enhancing the business environment for soft fruit growers, and identifying opportunities for value-added production. By benchmarking against international best practices, particularly from the Netherlands and Spain, and assessing Serbia’s comparative advantages, this consultancy will offer actionable recommendations that support the Ministry’s broader agricultural policy reform agenda. The results will not only benefit small and medium-scale farmers—who are the primary beneficiaries of SCAP—but also contribute to more efficient allocation of public resources, in line with Serbia’s EU accession objectives and commitments to sustainable rural development.

# The expected outcomes of this consultancy include a comprehensive policy framework with practical recommendations on improving production efficiency, market access, and sector competitiveness. The consultancy will support the Ministry in developing clear strategic actions to enhance the soft fruit value chain, promote innovative agricultural practices, and integrate digital and climate-smart technologies into the sector. The insights generated will directly contribute to the improvement of national agricultural policies, ensuring that Serbia’s soft fruit sector remains a resilient, high-value industry that strengthens the country's agricultural exports and enhances its standing in global markets.

# While the outcomes of this Technical Assistance may resemble elements of a strategy, the intention is not to produce a formal sector strategy. Rather, this TA aims to provide **strategic support** and evidence-based guidance for the Ministry of Agriculture in addressing key challenges and opportunities in the soft fruit sector. The findings and recommendations will inform ongoing policy development and sectoral planning efforts under the National Agriculture and Rural Development Strategy (NARDS), ensuring alignment and complementarity. This consultancy is therefore positioned as a thematic, technical input to broader strategic processes, and not as a standalone or parallel strategic initiative.

# 3. Objective of the Assignment

**General Objective**

The goal of this assignment is to perform a thorough and insightful technical assistance that provides a holistic analysis of Serbia's soft fruit sector, with a particular concentration on raspberries and blueberries. This research is envisioned to serve as a strategic document that captures the essence of the past and current market conditions, evaluates the sector's performance including recent market fluctuations, and identifies actionable pathways for future growth. The technical assistance aims to weave historical data with contemporary market trends to craft a narrative that underscores the sector's trajectory and potential. Additionally, the technical assistance seeks to benchmark against global best practices, notably from the Netherlands and Spain, to propose a tailor-made strategic roadmap for augmenting Serbia's position in the global soft fruit market. Moreover, cross-cutting matter will be the integration of **sustainable and socially responsible development.** This approach ensures that Serbia's soft fruit sector not only strengthens its international competitiveness but also aligns with evolving global standards for environmental and social responsibility. The ultimate objective is to deliver a comprehensive guide that empowers stakeholders with the knowledge and direction needed to foster a resilient, innovative, and competitive soft fruit industry in Serbia.

# Specific Objectives

# Sectorial Analysis Overview: To establish a foundational understanding of the soft fruit sector, particularly raspberries and blueberries, within the global and Serbian agricultural context. This includes a brief historical overview to set the stage for the current and future analysis.

# Assessment of Historical Context: To outline the development of the soft fruit sector in Serbia, with an emphasis on the evolution of market dynamics, production capacities, and economic impacts.

# Current State Evaluation: To scrutinize the last three years of the soft fruit sector in Serbia, taking into account market fluctuations, price trends, logistical challenges, and supply chain dynamics.

# Forward-Looking Strategies: To propose a forward-thinking approach that incorporates lessons learned from the Netherlands and Spain, as well as Serbia's own experiences, to outline a strategy for the sector's growth and sustainability.

# International Practice Adoption: To assess the farming practices and market strategies of leading soft fruit producers like the Netherlands and Spain, and evaluate their applicability within the Serbian context.

# Analysis of Serbia’s Comparative Advantages: To identify and articulate Serbia's unique competitive advantages in the production of raspberries and blueberries, including climatic, geographical, and economic factors.

# Market Opportunity Mapping: To explore Serbia's potential positioning and opportunities within the international market, focusing on market entry strategies, niche market identification, and value-added product innovation.

# Strategic Guidance Formulation: Based on the analyses, the technical assistance will develop comprehensive guidelines for Serbian stakeholders on enhancing production, improving quality, and increasing market presence. This will include recommendations for technology adoption, process innovation, and policy development to support sector growth. 9. Sustainable and Socially Responsible Development:

# Sustainability and Social Responsibility Integration: To integrate environmental sustainability and social responsibility principles across all aspects of the soft fruit sector analysis. This includes assessing the impact of climate change, sustainable energy use, circular economy, promoting eco-friendly farming practices, ensuring fair labor conditions, and identifying opportunities for green investments and certifications that enhance Serbia’s competitive position in international markets.

The consultant will craft a report that not only captures the essence and potential of Serbia's soft fruit sector but also serves as a blueprint for action that aligns with the country's agricultural policy framework and market development goals.

# 4. Scope of Services

The consultancy is commissioned to conduct a technical assistance focused on the soft fruit sector in Serbia, emphasizing raspberries and blueberries. The technical assistance will aim to provide a comprehensive overview of the sector's integration into the agricultural landscape of Serbia, assess its economic impact, and support the Ministry’s efforts in charting a course for future development by drawing on both local insights and international benchmarks.

The responsibilities of the consultancy will include, but not be limited to, the following activities:

* **Sectorial Analysis**: Support the Ministry in developing a market-oriented approach for the soft fruit sector by conducting a thorough review of the soft fruit sector's history and development in Serbia, understanding the shifts and trends that have shaped its current state.
* **Market Analysis**: Analyze the present market conditions for raspberries and blueberries over the past three years, considering factors like pricing dynamics, logistical challenges, and supply chain efficiencies.
* **Opportunity Identification**: Examine Serbia's potential market opportunities, proposing strategies for market entry, niche development, and product value enhancement.
* **Strategic Development Plan**: Formulate a strategic action plan that offers guidance on innovative practices and technologies that could be adopted in the Serbian context, including a timeline for implementation and identification of key stakeholders.
* **Competitive Advantage Evaluation**: Identify Serbia's unique attributes that position it for success in soft fruit production, including environmental, geographical, and economic factors.
* **International Best Practices**: Investigate and assess the farming practices and market strategies of leading soft fruit producers, such as the Netherlands and Spain, for potential adaptation within Serbia's sector.
* **Support and Monitoring**: Provide support for the introduction and adoption of recommended strategies and practices, and establish a monitoring framework to assess the impact and effectiveness of these initiatives.
* **Multidisciplinary Approach**: Apply a comprehensive approach that incorporates agronomy, economics, and market dynamics to ensure a complete understanding of the sector.

The scope of services is designed to delve deeply into Serbia's soft fruit sector, to establish a well-researched foundation for informed decision-making, and to pave the way for a robust, innovative, and market-oriented future for Serbian raspberries and blueberries.

# 5. Deliverables

For the technical assistance on the soft fruit sector in Serbia with a focus on raspberries and blueberries, the consultancy will be expected to produce the following deliverables:

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| DELIVERABLE NUMBER | DESCRIPTION | DUE DATES |
| Deliverable 1 | First Progress Report:  Preliminary report outlining the scope and methodology of the technical assistance. It will include an initial sectorial analysis of raspberry and blueberry production in Serbia, a review of current market dynamics, and an early mapping of potential development opportunities. The report will reflect the consultant’s approach to understanding the structural and economic positioning of the soft fruit sector and lay the foundation for subsequent analysis and recommendations.  (Reflects: Sectorial Analysis, Market Analysis, Opportunity Identification) | Up to 2 months after signing the contract. |
| Deliverable 2 | Second Progress Report:  Intermediate report building upon the initial findings and stakeholder feedback. It will deepen the assessment of Serbia’s competitive advantages, integrate relevant international best practices, and propose preliminary elements of a strategic development plan. The report will also include initial guidance for institutional support and a framework for introducing and monitoring recommended measures.  (Reflects: Strategic Development Plan, Competitive Advantage Evaluation, International Best Practices, Support and Monitoring) | Up to 5 months after signing the contract. |
| Deliverable 3 | Third Progress Report:  Comprehensive final report consolidating the technical assistance work into an actionable strategic framework. It will synthesize findings across all thematic areas, integrating sectoral, market, and policy insights through a multidisciplinary lens. The report will include final recommendations, policy guidance, and an implementation roadmap to support sustainable and inclusive development of the soft fruit sector in Serbia.  (Reflects: Multidisciplinary Approach, full consolidation of all preceding analytical and strategic work) | Up to 7 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.Top of Form

# 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.

# 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.

All activities and deliverables will be designed and executed in alignment with the World Bank's Environmental and Social Standards (ESS).

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 210 calendar days from its signing.

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# 9. Experience and Qualifications Requirements

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

* A minimum of 10 years of experience in agriculture, rural development, and policy analysis, including projects involving collaboration with international organizations such as the FAO, World Bank, EU-funded projects, or similar.
* Experience in at least one project focused on value chain development in the soft fruit sector, preferably in Serbia and/or comparable regions.
* Experience in designing, implementing, or managing at least one grant or subsidy schemes for agricultural development, including direct engagement with public or private sector stakeholders.
* Experience in projects, at least two, supporting government institutions, ministries, or agencies in capacity building, preferably related to EU accession processes.

**Desirable Qualifications (Considered an Asset):**

* Experience in projects involving agricultural finance, including collaboration with financial institutions to develop funding mechanisms for the soft fruit sector
* Experience conducting sector-wide assessments on agricultural competitiveness, food safety policies, or market dynamics across multiple countries.
* Experience in projects financed or supported by international financial institutions (IFIs) such as the World Bank, FAO, EBRD, or similar.
* Experience in strategic development initiatives or projects, with a role in translating data and policy analysis into actionable sector strategies.
* Experience in projects incorporating sustainability principles, climate resilience, or innovative agricultural practices.
* Experience in conducting capacity-building programs, workshops, or training initiatives aimed at promoting sustainable agricultural practices.

Consultant shall NOT submit CVs of key staff in its Expression of Interest. All experts must be independent and free from any conflict 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 No. 1 – Team Leader (1 position)**

**Mandatory:**

* Minimum 10 years of experience in the agriculture, cultivation or rural development, preferably but not limited to soft fruit sector, with projects focused on cultivation, value chain development, and market integration.
* Holds minimum Bachelor’s degree in Agronomy, Business Management, Agricultural Economics, or a related field.
* Experience leading at least two multidisciplinary teams in complex agricultural or rural development projects, ensuring effective coordination across different stakeholders.
* Knowledge of both Serbian and English is required

**Qualifications that are not mandatory, but will be considered as an asset:**

* Experience in at least two research projects focused on the implementation of innovative agricultural practices, including the use of technology or modern cultivation methods, is an asset.
* Additional certification or training in relevant areas such as market analysis, business strategy, or supply chain management (e.g., certifications from recognized institutions such as PMI, CIPS, or similar) is considered an asset. Higher level of education than the required minimum, such as an MSc or PhD, is also considered an advantage.
* Experience in projects involving strategic market positioning, sustainable business development, or export competitiveness in the soft fruit sector, is an asset.

**Key Expert No. 2 – Agricultural Economist (1 position)**

**Mandatory:**

* Minimum 7 years of working experience in agricultural economics, in projects focused on the soft fruit industry.
* Holds minimum a Master’s degree or higher in Agricultural Economics, Finance, Business Administration, or a related field, with expertise in financial analysis or agricultural policy.
* Knowledge of both Serbian and English is required

**Qualifications that are not mandatory, but will be considered as an asset:**

* Experience in projects requiring detailed economic analysis, financial modeling, or agricultural policy assessment, is an asset.
* Experience in knowledge of both international and local market systems, with experience applying economic principles to soft fruit sector development, is an asset.

**Key Expert No. 3 – Value Chain and Strategy Specialist (1 position)**

**Mandatory:**

* Minimum 7 years of working experience in value chain analysis and strategic market planning, with projects focusing on soft fruit sector development.
* Holds minimum Bachelor’s degree in Agronomy, Business Management, Agricultural Economics, or a related field.
* Knowledge of both Serbian and English is required

**Qualifications that are not mandatory, but will be considered as an asset:**

* Experience in projects involving the development and application of innovative farming techniques, including modern cultivation, processing, or post-harvest management practices, is an asset.
* Experience in advising public and private sector stakeholders on investment strategies for cultivation efficiency, value addition, and market expansion, with completed advisory engagements, is an asset.
* Additional certification or training in relevant areas such as value chain development, market analysis, or supply chain management (e.g., EU, FAO, or PMI-recognized programs or similar) is considered an asset.

# 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.

The Consultant will be evaluated applying the following evaluation:

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

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