**Republic of Albania**

**Ministry of Agriculture and Rural Development**

**Climate Resilience and Agriculture Development Project**

**TERMS OF REFERENCE**

**for Consulting Services for development of Fruits and vegetables cluster in the region of Dibra**

September, 2024

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# BACKGROUND

## The Agriculture Sector of Albania

**Agriculture is a key sector in the Albanian economy, contributing 18.6 percent to GDP and 33.9 percent to total employment in 2022[[1]](#footnote-2)**. 34.9% of the population live in rural areas of which the majority is engaged in agriculture. The wider agri-food system, including food-related services, processing and manufacturing, is directly or indirectly the source for almost half of the economy-wide jobs[[2]](#footnote-3) Public expenditures for agriculture have been low compared to other sectors and regional peers. Between 2010 and 2017, agriculture spending represented 1.9 percent of total government spending and grew only by about one third of the growth in total public spending. Total budgetary transfers to agriculture averaged 0.27 percent of national GDP between 2010 and 2017, compared to 1.27 percent of GDP in North Macedonia, 0.72 percent of GDP in the EU-28, and 0.51 percent of GDP in Bosnia and Herzegovina. 3. Forty-one percent of the population live in rural areas of which the majority is engaged in agriculture. The wider agri-food system, including food-related services, processing and manufacturing, is directly or indirectly the source for almost half of the economy-wide jobs.

**Agriculture production, in particular production of Fruits and vegetables, has become increasingly competitive in the last decade because of increased cultivation area (including greenhouses), increased yields and improved technologies**. The number of collection points and aggregators for trade, especially for the export of Fruits and vegetables, has increased. Despite limitations in food safety management, Albania has achieved a considerable increase in agri-food exports as a proportion of total exports (12.6 percent in 2023[[3]](#footnote-4)). The main exported food categories are edible vegetables; meat preparations; oilseeds; vegetables, fruits, and nut preparations; and edible fruits and nuts. The EU is Albania’s most important trade partner for both exports and imports of agri-food commodities (64.5 percent of total agri-food exports and 60.3 percent of imports during 2023)[[4]](#footnote-5), followed by CEFTA countries. There is a tendency of trade development Albeit these developments, Albania remains a net importer of agri-food products**.**

**Established agri-food businesses that can absorb greater quantities of products are often insufficiently supplied with the required quantity and quality of products by smallholder farmers.** Fragmented production (350,000 small farms with an average size of 1,2 ha), low productivity (the lowest in the Western Balkan region), and low compliance of production with quality standards and certification are all limiting factors. Without a strong supply, agri-food businesses are unable to compete effectively. Exports mainly concentrate on a small number of products in a few markets and for a limited time of the year (March-June), while the processing industry is facing strong competition from imports. To enhance access to domestic markets and improve export competitiveness, it is crucial to leverage private sector investments into green and effective value chain development and build productive partnerships between producers and agri-businesses.

**Local food systems and short supply chains that connect farmers and small-scale food producers in rural areas with buyers or consumers through direct marketing have yet to be developed** to achieve a wide range of economic, social and environmental benefits, which can be also attractive to young farmers, rural youth and women. Short supply chains are more beneficial if they increase regional added value by contributing to stimulating local economic development cycles by linking agriculture with other sectors, e.g., agritourism and rural tourism, development of local markets and local fairs, and integrating them into local development initiatives. The Albanian government in its Strategy for Agriculture, Rural Development and Fisheries (SARDF) 2021-2027 foresees the building of trading platforms for agricultural products, which aim not only at trading agricultural products in optimal conditions, but at the same time to also strengthening the farmers’ position in the value chain.

## Climate Resilience and Agriculture Development Project (CRAD)

The World Bank Group, through a loan of 64,6 Million euro, is supporting the Government of Albania to implement the Climate Resilience and Agriculture Development Project (CRAD) with the purpose to increase competitiveness and climate resilience of priority agri-food value chains.

The CRAD has three main components:

* **Component 1: Promoting Climate Smart Agriculture and Access to Markets.** This component aims at supporting resilient and climate smart agriculture, productivity and quality improvements and improving market access through investments to shorten value chains, strengthen resilience of food supply, introduce digital technology, and develop a modern and reliable irrigation delivery services and drainage network for high-value agricultural production.
* **Component 2: Enhancing Compliance with Food Safety and Quality Standards.** Activities under this component aim at addressing weak compliance and control mechanisms related to food safety, veterinary and phytosanitary standards which currently impede competitiveness and create market access inequalities both in the local and export markets.
* **Component 3: Strengthening Evidence-based Analysis Capacity of MARD and Municipalities.** This component aims at establishing a sustainable and effective monitoring and evaluation (M&E) system for agricultural and rural development policy in Albania. Support will be provided to build the monitoring capacity of the MARD and municipalities to increase their ability to measure and analyze agricultural policy impacts to support evidence-based policymaking.

Within the framework of Component 1, the **Sub-Component 1.1 Promoting Climate Smart and Resilient Value Chains aims at** supporting a resilient food distribution system and promote value addition of agriculture production to support the sharp increase of rural tourism which serves as a catalyst for rural development and amplifies the demand for local food products from national and international visitors. One key activity of this sub-component is the promotion of typical food products and value addition to enhance rural development through better integration of the different value chain actors and the development of value-added products. This entails the development of one cluster on Fruits and vegetables in Dibra region. For this value chains, the project will support: (i) technical assistance to build a consortium of producers, develop their technical and marketing capacities, and promote quality, branding and commercialization, and (ii) the construction of processing units to increase value-added of local products. The facilities will be owned by the State and given under subsidized concession agreement to a consortium of producers.

## Clusters objectives and expected benefits

The project will support the development of Fruits and vegetables as typical food product clusters in the Dibra region. The principle of a cluster is to bring together processing companies, researchers, extensionists, farmers and other partners all working within the same sector to combine their efforts in terms of research and development, promotion, or training to benefit from the synergies and economies of scale. The main priorities of the cluster will be to create the enabling environment for the valorisation of fruits and vegetable production as typical food products (apples, prunus, cherries and the most vegetables production in the region) through the **aggregation of producers** (consortium), and the **improvement of quality and market access** with the **development of their technical and marketing capacit**y. The clusters will support and ensure increased and meaningful participation of women and integrate them into fruit processing and simple processing value chains and markets, such as through creation of women’s groups.

**II. OVERALL OBJECTIVE OF THE ASSIGNMENT**

The Project Development Objective is to /raise productivity, production, and marketable volumes of fruits (such as: apple, plums, pear, cherry, etc.) and vegetables (onions, tomatoes, peppers, etc.), in Dibra geographic district. Fruits and vegetables have a strong market focus and aim to improve the competitive position of each cluster in market segments identified. These consortia serve as vital platforms for farmers to penetrate the ideal market segments.

The objective of the assignment is to offer technical assistance for the establishment of fruits and vegetables consortium in the Dibra region. The primary goals of the consortium are to unite producers and processors into a single entity responsible for specific fruits and vegetables production, processing, marketing, branding activities, and interaction with certification bodies. **Establishing a fruits and vegetables consortium** in Albania is deemed crucial for enhancing market access and product differentiation.

The Consultant will in particular, be based on the achievement of a preliminary assessment of fruits and vegetables value chain in Dibra region, build a consortium of fruits and vegetables producers (a minimum of 50 producers with a minimum of 30 women), develop their technical and marketing capacities and promote quality, branding and commercialization.

**III. SCOPE OF WORK**

The Scope of Work for this Assignment is divided in phases.

**Phase I: Establishing fruits and vegetables consortium.**

**Note: To enhance efficiency and effectiveness, multiple activities within this Phase will be conducted simultaneously.**

Specific objective

The specific objective of this phase is to establish a sustainable consortium of fruits and vegetablesproducers to produce quality fruits and vegetablesunder a common brand and commercialize it in high-end outlets (e.g., Hotel, Restaurant and Catering sector) while promoting the specificity of the local territory. The consortium will support all stakeholders across the fruits and vegetablesvalue chain in continuously improving the quality of the fruits and vegetables placed on the market. Additionally, it will provide training on best practices to develop and maintain the highest possible quality standards and improve marketability of fruits and vegetables.

**Specific Scope of work**

Under this phase, the Consultant will define the fruits and vegetablesconsortium objectives, participants and operational functioning.

**Activity 1: Market study and value chain analysis**

The Consultant will prepare a market study and a value chain analysis for the fruits and vegetablessector centered on Dibra region to identify key bottlenecks in the production, post-harvest, processing and commercialization activities to design several scenarios of development for the future consortium.

The value chain analysis will be key for:

* Developing a SWOT analysis of the fruits and vegetables sector in Dibra region
* Identify the specificities of the territory
* identify key technical, qualitative, marketing and branding improvement to better
* commercialize the fruits and vegetables in the region and meet high-end outlets standards
* Identify processing units capacity, efficiency and need for upgrading or additional equipment for quality fruits and vegetables production and possible diversification of theirs products.
* Orientate consortium objectives, define consortium strategy, and identify potential facilities and equipment needs for fruits and vegetables production purposes
* Propose a specific technical assistance package for future participants to the consortium (including e.g. training programs, capacity building workshops, certification assistance, laboratory testing services, technical advisory services including on-site consultations)

The market study will be key to:

* Capture market trends in terms of fruits and vegetables taste and certifications
* Have an overview of key outlets for fruits and vegetables according to their quality
* Identify key potential buyers first in HoReCa sector in Albania and on international markets
* ldentify key competitors on local market and the characteristics of their positioning

The Consultant will also produce a benchmarking of similar consortiums established locally or internationally to identify key success factors and best practices to be used for consortium development.

The Consultant will also assess the interest of local producers in participating in the consortium while exploring main potential outlets for premium fruits and vegetables from the region.

**Activity 2: Development of a strategy and business plan**

Based on the previous activities, the Consultant will introduce a conceptual scenario with draft project goals and strategy, concept, key activities, with first estimation of costs, functionalities, and management based.

The tasks to be delivered under this activity include, but are not limited to the following:

* Proposing and designing a concept under several scenarios in accordance with the market study and value chain analysis (for example scenario 1: consortium with key market outlet retail chains, scenario 2: consortium targeting HoReCa sector. Scenario 3: orientation towards fruits and vegetables certification);
* Identification of key challenges and equipment needs for quality fruits and vegetables production in Dibra region.
* Estimation of costs and profitability of each scenario;
* identifying potential management/governance model of the consortium. Several options of management models for the future consortiums will be studied. They will be based on the local context, considering the main stakeholders to be associated in the management and operations of future consortium to ensure its financial sustainability.
* Preparation of an operation plan

The different scenarios will be introduced during a workshop organized by the consultant (under the cost of this assignment) to public authorities and the fruits and vegetables sectors main actors.

**Activity 3: Support to consortium members selection**

The Consultant will support local authorities in selecting the future participants to the technical assistance program leading to the creation of fruits and vegetables consortium in Dibra.

* Organization and facilitation of a local workshop with local communities including: municipality, RAD, Agriculture Cooperation Association ACA, agro-processors, traders etc to introduce consortium objectives and process of participation to the technical assistance program.
* Develop a call for participation to the technical assistance program under the governance of Ministry of Agriculture and Rural Development (MARD) and local municipalities;
* Support local authorities in the design of selection criteria (e.g. technical, inclusive criteria) for the future members of the consortium.

**Phase lI: Capacity building activities for consortium members**

**Specific Objectives**

Under this Phase, the Consultant will be responsible for supporting the establishment and development of the consortium through the monitoring and the deliverance of technical trainings. The Consultant will also provide support with officially registering and getting the license of the consortium through the MARD.

**Scope of work**

The Consultant will be engaged to develop the capacity of the consortium members for two/three years in order to improve production techniques, fruits and vegetables quality, processing techniques, food hygiene and safety, marketing, commercialization and branding of the fruits and vegetablesconsortium. The Consultant will provide international and local experts to support the activity of the consortium until it reaches its operational capacity. The collaboration between all the different experts will be key to achieve the ambition to build a branded quality fruits and vegetables for Dibra region.

**Activity 4: Improve production and post-harvest techniques.**

The Consultant will strengthen the capacity of consortium members in fruits and vegetables cultivation and post-harvest technics to improve final quality of fruits and vegetables produced and support sustainable management practices (water use, pesticides). The Consultant will provide one expert (agronomist) responsible for organizing on-field trainings and monitoring of the production for two/three years. The expert will be responsible for producing the training program and materials based on phase I preliminary assessment.

The expert will prepare and deliver a clear training package based on the value chain analysis and the identified gaps at the production and post-harvest stages. He/she will be responsible for providing on- demand advices to consortium members (online and in-person) for two/three years and will monitor monthly the evolution of the production and participate to harvesting while providing post-harvest recommendations.

He/she will need to produce a record of the trainings at the end of the year to keep track of the type of assistance needed by producers and maintain a memory of the sector's development.

**Activity 5: Develop FRUITS AND VEGETABLES quality.**

The Consultant will support consortium members in developing unique quality fruits and vegetablesconnected to the specificities of Dibra territory and fruits and vegetables production. The Consultant will provide a quality expert who will develop a training package, theoretical and practical, about quality improvement in fruits and vegetables processing.

He/she will in particular focus on:

***Theory:***

* Organoleptic evaluation of different fruits and vegetables in the Dibra region
* Chemical and physical characteristics of fruits and vegetables
* fruits and vegetables growing and the effects on the quality of their subproducts.
* Influence of technology on the quality of fruits and vegetables subproducts.
* The classification, the community, and international legislation of fruits and vegetables
* fruits and vegetables and their benefits in the diet: healthy and physiological aspects
* Production and consumption in the world

***Practical***

* Tasting technique and organoleptic evaluation sheet
* Recognition of negative and positive attributes
* HACCP Standards for handling fruits and vegetables and their subproducts as well as good hygiene and manufacturing practices).
* Different packaging techniques for fruits and vegetables and their subproducts
* Standards of labelling the fruits and vegetables their subproducts
* Quality of fruits and vegetables and their subproducts and how to produce high-quality products (PDO and PGI certifications processes)

Based on the preliminary assessment achieved in phase 1 and in collaboration with the agronomist and the consortium members, the expert will oversee the development of a characteristic fruits and vegetables and their subproducts from Dibra region. The fruits and vegetables and their subproducts will meet the best international practices in terms of technics and final quality tasting while being characteristics of local fruits and vegetables and their subproducts production and the territory. The expert will provide and work in close collaboration with a marketing and branding expert to reflect in the future brand the specificity of Dibra fruits and vegetables and their subproducts.

The expert will be responsible for producing the training program based on phase I preliminary assessment and the training material. He/she will guide consortium members in the obtention of quality certifications.

He/she will need to produce a record of the trainings at the end of the year to keep track of the type of assistance needed by producers and maintain a memory of the sector's development

**Activity 6: Marketing, promotion, and branding development**

The marketing and branding expert will deliver specific trainings to consortium members to improve access to market of local fruits and vegetables and their subproducts on high-end markets (HoRe Ca, export) through a marketing and communication strategy, the development of a specific branding linked to the fruits and vegetables and their subproducts characteristics and territory and several Business to Business promotional events. The experts will be responsible for producing the training program based on phase i preliminary assessment and the training material.

The expert will support consortium members, in coordination with fruits and vegetables and their sub-products quality experts and based on market study, by delivering specific technical trainings in particular on: marketing strategy development strategic promotion approaches implementation, narrative development for product promotion, integration of products with HoReCa sector.

The expert will be in charge, in consultation with consortiums members, of the development of a specific brand with its logo, packaging and full promotional package.

The expert will also be responsible for the organization of several (minimum two) Business to Business meetings to promote consortium's fruits and vegetables and their sub-products in collaboration with local authorities. Target audience will be local HoReCa and potentially international buyers.

He/she will need to produce a record of the trainings at the end of the year to keep track of the type of assistance needed by producers and maintain a memory of the sector's development.

**Activity 7: Organize a study tour.**

The Consultant will be in charge of organizing a study tour in one of the main fruits and vegetables and their subproducts producer's countries ex. In Turkey, Moldova, Italy, Greece or neighbour’s countries which also have similar typologies and are already advanced and efficient in these types of clusters. The tour will be dedicated to the consortium management staff or representatives (10 persons). The study tour will represent an opportunity to share best practices in fruits and vegetabless and their subproducts and inspire the consortium in its approach to market and their promotion.

The study tour will visit fruits and vegetables and their subproducts production areas, processing units and leading consortiums in quality fruits and vegetables and their subproducts production. Several exchanges with the local producers and local authorities will be set up to understand the process of development of the consortium, the processes applied to increase quality, the marketing strategy according to current fruits and vegetables and their subproducts demand and as well as branding strategy developed. Criteria: (members of the consortium, food industry representative, producers and exporters) The consultant is covering training expenses.

**IV. REPORTS**

The Consultant shall submit the following reports:

**i. Reports Phase 1**

(i**) Market study and value chain report**: presenting in particular the key bottlenecks in fruits and vegetables and their subproducts production in Dibra region, market analysis, SWOT, regional and international benchmarking.

(ii) **Local workshop report:** presenting participants and main comments from participants to preliminary consortium strategy and objectives

(iii) **Final report**: introducing conceptual scenario with project goals and marketing strategy, consortium members, management, equipment needs, cost estimation.

**ii. Reports Phase 2**

(iv) **One intermediary training report** **for each expert** (agronomist, quality, marketing, and branding) with all training materials

(v) **One final training report for each expert** (agronomist, quality, marketing, and branding) with all training materials

(vi**) One study tour report**

The Consultant shall provide the deliverables in English language. The final report shall include all the parts/study in electronic version (standard software's) and one hard copy for the national authorities.

**DELIVERABLES, TIMELINE & PAYMENT SCHEDULE**

The Consultant will have 5 working days to address comments received from the client on each deliverable, if any. Upon satisfaction with the updated deliverable, if necessary, the Client will approve the deliverable within 2 working days.

The budget and payment schedule are expressed by phase.

**Phase 1- Design of fruits and vegetables consortium**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Phase 1 – Design of fruits and vegetables Consortium** | | | | |
| **D.No** | **Deliverables** | **Deadline submission** | **Review and Commented by the client** | **Payment schedule** |
| D1 | Market study and value chain analysis report | 60 days after the signing of the contract | Two weeks after submission | 10% |
| D2 | Local workshop report | 80 days after the signing of the contract | Two weeks after submission | 10% |
| D3 | Final report | 100 days after the signing of the contract | after weeks Two submission | 20% |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Phase 2 — Capacity building activities for consortium’s members** | | | | |
| **D.No**. | Deliverables | Deadline Submission | Approval by the Client | Payment Schedule |
| D4 | (4) Intermediary training reports | 365 days after the  signing of contract | Two weeks after submission | 30% |
| DS | (4) Final training reports | 730 days after the signing of the contract | Two weeks after  submission | 20% |
| D6 | Study tour report | 365 days after the signing of the contract | Two weeks after submission | 10% |

Final approval of all deliverables will be provided 2 weeks after the receipt of the version which fully addresses comments by the Client and has been cleared by the Client.

The Consultant will be evaluated on strategy and creativity in achieving the key Project milestones. Many tasks will need to be undertaken concurrently, as such timing and planning will be essential in preparing the Project for constitution.

**A.** **CONSULTANT QUALIFICATION**

The contract will be awarded following a quality- and cost-based selection procedure with 80:20 ratio in accordance with the Procurement Regulations. The Consultant may associate with other Consultants in the form of a joint venture or of a sub-consultancy agreement to complement their respective areas or expertise, strengthen their technical responsiveness of their proposals, make available bigger pool or experts, provide better approaches and methodologies. Partnering with local consulting firms is encouraged.

Firm Qualifications

**1. The Consultant** shall be a firm or group of firms with the following minimum qualifications:

* The Consultant should be a reputable consultancy firm with demonstrable knowledge and at least 10 years with international/regional expertise in sustainable development, exports, market expansion, innovation and competitiveness boosting specifically in sectors such as agriculture, agro-processing, tourism, environment;
* Demonstrated expertise in building training programs/accelerators/incubators for similar projects preferably related to fruits and vegetables sectors and subsectors;
* At least 2 similar contracts are successfully implemented during the last 7 (five) years in the assessment, development of agriculture clusters or consortiums of producers (not necessarily limited to the fruits and vegetables sector);
* Experience in working in the Balkan region would be considered an asset.

The credibility of mentioned experience shall be presented in a list of the required similar project/contracts as required above, including description of services provided (including information on contract value, contracting entity/client, project location/country, duration, assignment budget, percentage carried out by consultant in case of association of firms or subcontracting and main activities) and accompanied by any possible proof certificates/ publications/links in social media/confirmation of orderly fulfilment of the contracts verified by other party from such contracts.

It is required to provide examples of assignments of similar nature.

The Consultant may associate with other Consultants in the form of a joint venture or of a sub-consultancy agreement to complement their respective areas of expertise, strengthen their technical responsiveness of their proposals, make available bigger pool of experts, provide better approaches and methodologies.

The applicants will be assessed in order to determine a shortlist comprising the most qualified firms. The criteria to be used for shortlisting will be the following:

* Core business and years in business – 30 points
* Past experience in similar assignments – 60 points
* Availability of qualified staff among the firm to perform the assignment – 10 points

The CVs of Key experts will not be evaluated during the shortlisting process.

The shortlisting criteria are:

|  |  |
| --- | --- |
| Evaluated Grid | Points |
| Core business and years in business | 30 |
| Experience in similar assignments | 60 |
| Firms’ organization and staffing | 10 |
| Total | 100 |

**Key Experts ((Not limited to)**

The Consultant shall provide a concise list of key experts that would be best suited to carry out the scope of works and deliver on the assignment. The Consultant shall submit a project-resourcing plan and clearly illustrate a strategy to deliver on the various work streams. The expected level of engagement for the team of key experts is 51-man months. It is expected that the Consultant's core team shall consist of following key experts:

**Key Expert 1: Team Lead Consultant**

* The Lead Consultant should be an international expert.
* The minimum of a Master degree (a Ph.D., degree or equivalent is preferred) in Economics, International Business, Economy and Statistics, Economic Development, Tourism and Business Management, Communications, or a related field).
* Should possess at least ten (10) years of experience in project design and implementation in a developing sector (SME competitiveness, exporting, agriculture, sustainable development, tourism, private sector development, good governance, women entrepreneurship), specifically designing, implementing, and managing projects related to economic development strategies and action plans.
* Demonstrated knowledge of the current agricultural sector, MSME development and export readiness of Albanian fruit and vegetable producers is highly desirable.

**Key Expert 2: Sustainable Agriculture Production Expert**

* Minimum of a master degree (degree Ph.D., or equivalent is preferred) in Business Administration, International Business, Economics, Agricultural Development, Tourism, or a related field.
* At least 10 years working experience out of which at least 3 years of experience delivering research; in quality fruits and vegetables production and post-harvest skills, sectoral analysis; value chain studies; export readiness; competitiveness analysis; business development and support.
* Practical experience, will be highly valued.

**Key expert 3: Value Chain Development Expert**

* The candidate should possess a minimum of master degree (Ph.D degree or equivalent is preferred) in agro-processing engineering; Agricultural studies; Rural development policies; Management of agricultural enterprises; Sustainable food systems or a related field.
* It should have at least 5 years’ experience in feasibility studies; in designing and conducting training programs with professionals, experience in value chain development and related training.

**Key expert 4: Quality and food safety expert**

* Degree in chemistry or food technology, agriculture science, or a related field
* At least 7 years' related experience in fruits and vegetables and their sub-products quality, origin, food safety and traceability
* At least 7 years' in designing and conducting training programs with professionals.
* Experience in Balkan or comparable markets is highly preferred.

**Key expert 5: Marketing and branding expert**

* Master’s degree in communication or equivalent.
* At least 7 years of experience in the definition and deployment of a communication and branding strategy as part of the labelling of products internationally/regionally.
* At least 7 years' in designing and conducting training programs with professionals.
* Experience in the agri-food sector is desirable.

In addition to the required key experts, the candidate firms should also include in their technical proposal, in the personnel work plan and financial proposal all other "non-key experts" required in accordance with their proposed approach and methodology.

The consultant will be selected based on Quality and Cost Based Selection (QCBS) method in accordance with the procedures 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 2020).

**Backstopping/Home Office Support**

The Consultant should have additional resources available as needed with experience working on similar projects to support the key experts as required throughout the assignment.

1. Institute of Statistics (INSTAT). Albania in Figures, 2020. [↑](#footnote-ref-2)
2. World Bank. 2017. Agriculture for Jobs and Growth in the Western Balkans: A Regional Report. [↑](#footnote-ref-3)
3. Institute of Statistics (INSTAT). [↑](#footnote-ref-4)
4. Joint Research Centre (European Commission). 2021. Recent agricultural policy developments in the context of the EU approximation process in the pre-accession countries. [↑](#footnote-ref-5)