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Assessment of Market Information System (MIS) in Kosovo and Strategy to Improve the Current System

Peter Robbins – May 2009

Implemented by:



List of Acronyms

AICC – Agriobusiness Information and Consultancy Centre
FAO – Food and Agriculture Organisation of the United Nations
HPK – Horticultural Promotion in Kosovo
KMIS – Kosovo Market Information System
MIS – Market Information System or Market Information Service
SDC – Swiss Agency for Development and Cooperation
SOK – Statistical Office of Kosovo
UNCTAD – United Nations Conference on Trade and Development
USAID – United States Agency for International Development

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Executive summary

The in-field part of this study took place between the 19th and 24th April 2009. Evidence used to inform the study was gathered through contemporary reports and other relevant literature and interviews with HPK staff, farmers, traders, market operators, a supermarket buyer, an agriculture ministry official, the operator of the current MIS, and representatives of farmers associations, USAID, a local radio station and a mobile phone company.

The study has been undertaken to provide an external opinion about how the Horticulture Promotion in Kosovo (HPK) project could support the development of a more efficient MIS for the horticulture sector in Kosovo. The main objective of the study is to know how the system could be improved in order to help actors in the sector to make their short, medium and long-term decisions.

Specifically, the study has three main goals:-

a) To make a quick assessment of the market information systems in the Kosovo horticultural sector, including their sustainability, reliability, linkages with real needs, and their impact on the overall development of the horticultural sector of the country. This assessment should describe the different mechanisms for 'price fixation and diffusion' from the farmer to the customer. In addition, the study should identify the information needs of the main horticultural actors.

b) The second specific objective of the study is to propose a strategy (including set-up and methodology) on what type of MIS would be appropriate and feasible for further development of the horticultural sector in Kosovo. Such strategies could be associated with the MIS or through a new system.

c) Lastly, the study should recommend strategic alliances, strategic steps, and project involvement and support in the implementation of the proposed strategy.

In the years since the break-up of Yugoslavia, Kosovo has gradually improved its horticultural industry but has had to adapt market practices in the sector to the loss of its agricultural role in the much larger, integrated Yugoslavian economy. Opportunities for exports have been lost and the monitoring of production and markets has become much less sophisticated. Horticultural goods are traded through private arrangements between dealers, producers, processors and retail institutional outlets. None are traded publicly through auctions or commodity exchanges.

Communication between stakeholders in the horticultural trade has been made easier with the advent of mobile phone networks but little use is made of more sophisticated ICT in the industry.

Although three organisations collect market prices, the infrequency of the services, the likely inaccuracy of the results and the inappropriate means of dissemination means that their output is of little use to most sector actors.

All those involved in producing and trading agricultural goods need accurate and appropriate market information and the case for MIS provision in Kosovo is clearly very strong.

Assessment of Market Information Systems in Kosovo and Strategy to Improve the Current System

Background

Kosovo is a small, landlocked country recovering from recent conflict (1998-99) whose national status is still unrecognised by many other countries. Some 60% of Kosovo's two million people live in rural areas and 15% make their living exclusively from the land.¹ Horticultural production is divided between small-holders, commercial growers and agricultural cooperatives.

Due to its high elevation above sea level and its continental climate (rather than a Mediterranean climate), the growing season for most fruit and vegetables is shorter than that of other countries in the region, e.g. Albania and Macedonia. Kosovo has erected few barriers to trade in horticultural products with the outside world in the form of import tariffs and non-tariff barriers yet its neighbouring countries impose some restrictions on trade with Kosovo, including EU seasonal fruit import limits and a restriction on the use of Kosovo trucks in cross boarder trade. These problems, combined with the fact that much of the agricultural infrastructure and know-how disappeared in the war ending 1999, explain why Kosovo imports over half its requirements of fruit and vegetables – some 75,000 tons in 2007. Some of these items, such as bananas, oranges, etc. simply cannot be grown in the country but most others can only be grown for harvest between May and September. Many types of fruit and vegetables, which are consumed in the country on a large scale such as tomatoes, peppers and apples, are produced locally in the comparatively short growing season but some of these same products are imported throughout the year.

About 4,000 tons of a very limited range of horticultural products are exported each year. These include potatoes, cabbages, wild mushrooms and grapes and some tomatoes, onions and peppers when market conditions are favourable.

Findings and assumptions

In order to arrive at the proposals made in this report certain assumptions had to be made. These assumptions came either from widely agreed findings of previous research, the stated aims of HPK or from interviews with relevant stakeholders which took place during the course of this study. They are as follows-

Horticulture can make a significant and positive contribution to employment and the wider economy of Kosovo.

There are tens of thousands of people employed in horticultural production compared with the few thousand employed in the rest of the value chain. This means that although some higher quality jobs can be created in, say, the processing or packaging of horticultural products, even a small increase in production would create a comparatively large number of jobs on the land. Since the creation of jobs is a central objective of HPK's work, this study has

¹ HPK/SDC Workshop 17/3/09

taken those sector actors who work in production as the main intended beneficiaries of an improved MIS system.

Although Kosovo exports a few horticultural products, horticulture's main potential contribution to the economy is to reduce the volume of imports during the domestic harvest season. An increase in import substitution, therefore, is taken to be the main economic goal of the proposed market information service.

Most growers have little idea of what contribution an effective MIS could make to their work. For this reason farmers would be unwilling to make a financial contribution to the provision of MIS until enough time has elapsed to convince them of its importance, and an efficient means of collecting donations from farmers is devised.

It is generally understood that the provision of market information in the agricultural sector is undertaken to assist all actors in the agricultural chain to make business decisions that will maximise their income and, thus, increase the efficiency of the market along the entire value chain. Such information can, in a fully competitive market, be acquired by the actors themselves through transparent systems such as open auctions, commodity exchanges and by analysis of price movements.

The type of information provided by MIS to assist actors to make their business decisions can have a wide range – from prices, to traded volumes, to production yield forecasts, to general market news.

Chapter 1: Current horticultural market practice

Few markets are truly efficient and competitive and Kosovo does not appear to be an exception. A 2009 *Round table dialog between HPK and the Swiss agency for Development and Cooperation (SDC)* identified the major weaknesses in the sector as poor organisation among producers, lack of relevant knowledge, low technology, poor marketing, poor quality standards, lack of post-harvest strategies, and production and marketing problems associated with the small quantities of goods produced per unit.

Trade in horticultural products in Kosovo is characterised by close and private trading relationships between individual actors in the value chain. This pattern was confirmed by all the interviewees involved in trade.

A farmer develops a close business relationship with a trader over, perhaps, many years. At harvest time contact will be made between the two parties either in a fixed market place, or at the farm or over the telephone. The preferred trader will propose his (there seems to be an absence of female traders) buying price. The farmer may propose a higher price and may even check with other traders that he is justified in doing so. Haggling with the preferred trader may ensue but, inevitably, the farmers will strike a deal only with the preferred trader. We heard of no exceptions to this pattern of trade during all our interviews. Hence, it is possible to describe producers as 'price-takers', rather than 'price-makers'.

The relationship between the farmer and the trader may not always result in a transaction. There are many reports of glutted markets in recent years where farmers were unable to sell their produce at any price or had to let it rot in the field.

This pattern of trade is extended, perhaps slightly less rigidly, in trader-to-trader business, including those engaged in imports and exports, and in bargains struck between traders and processors and between traders and retail outlets.

Given the limited numbers of actors interviewed for this study, it is impossible to be certain that there isn't some variation in this trading practice but trading relations of this very personal and intimate kind obviously have some cultural and historical origin. It might explain why there are no, more transparent, price-fixing mechanisms such as auctions taking place in the country. Certainly, the power of the market to set equitable prices is greatly reduced by the unwillingness of actors to oblige their trade counterparts to compete freely for their business. Although there is no evidence of deliberate collusion between traders (or any other actors) to fix prices, it was impossible to discover whether a similar culturally-based mechanism does not exist to preserve an unjustified (and, therefore, risk-less) margin of profit for all traders.

Assessment of current MIS in the horticultural sector in Kosovo

Prior to the break-up of Yugoslavia, horticultural markets in Kosovo were said to be closely monitored and both prices and volume of trade recorded. Opinions differ as to how accurate the recorded figures were, however.

The Kosovo Market Information System (KMIS)

The KMIS was established in 2006 by the European Agency for Reconstruction to collect and disseminate weekly wholesale prices of 135 commodities from seven different cities in Kosovo. The range of items includes fruit and vegetables, dairy products and 'other agricultural goods' (including inputs). The service is managed by a local NGO staffed by a coordinator and some part-time workers who are, apparently, students studying an agricultural subject. A proportion of the services costs are met by an international bank – Raiffeisen Bank and, recently, by the Statistical Division of the Ministry for Agriculture, Forestry and Rural Development.

The data are published through a webpage developed for this purpose www.food-ks.org, and the organisation has undertaken some historical analysis of prices. The data are also disseminated through newspapers and different national and local radio stations at no cost to KMIS.

The prices collected and disseminated for horticultural goods do not differentiate by the size of bargain involved. In reality, prices for, say, 100 kilos of onions would be very different from the price for 10 tons of the commodity. Nor are prices differentiated between varieties of the same crop, by packing differences or differences in quality. Prices are collected on a weekly basis even though the markets for horticultural goods are very volatile and can change significantly from day to day.

The coordinator has received no expert training for the work he does and he is responsible for the training of his staff. Market traders are the source of the data received.

The official working for USAID, who was interviewed in the course of this study, contacted the KMIS coordinator recently with a view to assist them. USAID, apparently, offered the organisation resources and advice on how to publicise the service but were dissatisfied with the level of positive response. They have not to date offered further help. USAID also monitored the prices published on the organisation's website and were surprised to observe that, in some cases, published prices remained unchanged for extended periods of time. An informal observation by one of HPK's staff members detected significantly wide differences between the organisation's prices for commodities in Pristina market and HPK's own price estimates of the same data. None of the farmers or traders interviewed for this study had heard of this MIS service.

Apart from prices the KMIS service gathers nor disseminates other market data.

Statistical Office of Kosovo (SOK),

The SOK has collected monthly price data on some 64 products since 2002. The information is used to calculate the Consumer Price Index and for other internal government purposes.

The Agricultural Ministry's interest in the MIS project serves its own internal needs. The chief of the ministry's Statistics Division confirmed that ministers, civil servants and politicians regularly inquired of her office the price of different commodities in various parts of the country at particular times. K MIS was able to provide such information but the division chief

was not always able to discover what the information was ultimately used for. She also stated that the Statistical Office of Kosovo (SOK), which collects similar price data on a monthly basis, were slow to process the data which meant that this department was of little use for her purposes. In any event, the function of the SOK's work in this field is designed to monitor inflation and other government intelligence needs and cannot, therefore, be regarded as a market information service for actors in the horticultural value chain.

Horticultural Promotion in Kosovo (HPK)

Horticulture Promotion in Kosovo (HPK) project was launched in 2001 with the overall objective of creating sustainable employment and income through the promotion of the horticultural-agribusiness sector, thus benefiting the economy as a whole.

Since 2001 the Horticultural Promotion in Kosovo project has been collecting weekly wholesale prices for fruit and vegetables in the Pristina market (and the sources of these products) since 2001. The information is published on the project's website and was used to compile a *Quarterly Market Trend Report*. After three months of operation the number of subscribers to the email version of the report stood at 80. These included government departments, farmers and NGOs. The data are used internally to help HPK in its advisory work with producers, processors and other actors. The report has not been produced for some years, however, as HPK decided not to expand its MIS role.

HPK's activity in this area suffers from a similar set of shortcomings as the Kosovo MIS project. Prices are only recorded on a weekly basis. Traders are the source of the information and no differentiation is made between prices in respect of volume, variety, quality or packing. The bulk of farmers and other actors in the horticultural value chain in Kosovo are not the intended, direct recipients of this service.

Informal information networks

In the absence of formal provision of prices and other market information, actors in the horticultural sector are obliged to gather what information they can for themselves. This informal activity is carried out by word of mouth either during regular visits to various wholesale or smaller horticultural markets (held in towns throughout the country on one day each week) or using mobile phones. No interviewees used email or the internet to exchange information and none gave evidence that computer-based information exchange was used by any actors – even in foreign trade.

Traders freely exchange information with other traders and farmers appear to get most of their market information from traders with whom they have close business relationships.

Conclusion

Current efforts to collect and disseminate information about horticultural markets are confined to the discovery of market prices on a weekly and monthly basis.

Those individuals or institutions that are actively engaged in trading these goods have no access to accurate, independent information on traded volumes, transport and storage costs, price premiums for various qualities and varieties, trading regulations, inputs,

packaging, etc. Individual actors have a limited scope to identify the best buyers or sellers in the market at any given time.

The market prices currently collected are unlikely to be of use to actors in the sector and, indeed, few interviewees had heard of these efforts.

In the context of the present system for marketing horticultural products in Kosovo the practice by the KMIS and HPK of discovering prices only from discussions with traders alone is flawed.

The markets for many horticultural products are highly volatile. Prices can change significantly from day to day due to, say, poor harvesting conditions linked to the weather, and most products deteriorate rapidly in quality after harvesting. This means that prices should be recorded and disseminated on a daily basis if they are to be of any use to farmers and other actors.

None of the operators have any professional training in this field and there is some evidence, gained from monitoring the KMIS, that the service may not always be able to collect prices each and every week.

At present, and under the existing trading practice, traders, using their mobile phones, are able to gather adequate information on the domestic market using informal networks of information- gathering among traders across the country. These networks are not as efficient as they might be however, especially for assessing volumes of available goods on the market, or those about to arrive on the market, and in assessing availability, opportunities and competition in the external market.

Information on items relating to the costs of trading, such as transport, storage, handling, weighing, repacking, etc. are fully accessible to traders who appear to know the range of companies providing such services.

The information collected currently clearly is of use to analysts, advisors and planners, such as those in HPK and the government, for medium and long-term use.

Both the HPK and KMIS activities are carried out at a comparatively low cost. (One full time coordinator and seven part time students in the case of the KMIS, and one tenth of the cost of one staff member at HPK.) And, since the gathered information is found to be of use to the various bodies mentioned above, both activities, such as they are, are probably sustainable.

Information needs

A 2006 report, *Results of potential users survey for market information systems*, by Michael Burchell, et al, found that, among a wide range of stakeholders, identified information needs included reports of commodity prices as the main priority but followed closely by information offering advice on quality, post-harvest activity and transport.

In all countries, everyone who makes a living directly or indirectly from agriculture can improve their performance and livelihoods if they have access to appropriate information about the markets of the products they deal in. In many countries various categories of

actors may be wealthy enough or well organised enough to gather the necessary information for themselves. Where certain commodities are traded openly through auctions or commodity exchanges, the market itself provides much of the required information. These conditions do not apply in horticultural markets in Kosovo, however.

One key objective of the HPK project is the creation of jobs in the horticultural sector. Although the promotion of the sector could create a limited number of high quality jobs in, say, the processing, trading and other parts of value chain, it is in the production of these products where a real impact on employment is likely to occur. For this reason the provision of useful market information to farmers is of crucial importance.

Horticultural farming is an innately precarious occupation. Apart from the vagaries of the weather and the predation of pests and disease, even success, as measured in bumper harvests, can result in below-cost market prices.

Farmers in the more developed countries of Europe have access to thousands of sources of information. Auctions offer a transparent source of price information. Planting records and meteorological evidence provide yield forecasts. Market information is published in specialist newspapers and by farmers' unions and by government departments. Radio and television programmes are made to provide more of their information needs. Information on inputs and technology is available from a host of suppliers and traders. In Kosovo, a country highly dependent on agriculture, very little useful independent market information is supplied to farmers by any institution.

Of course, farmers in Kosovo need extension services to advise them on how to produce crops but, in order to maximise their income, all farmers need to know what to grow, when to grow it, how the market works, who to sell their produce to, how it should be packed, what quality standards apply, what choice of inputs they should have, what costs are involved in growing the product and getting it to market, what competition they face, and what prospects there are for receiving an above-cost sales price.

Information needs of the other actors in the sector are different.

There are several categories of traders in Kosovo. These include small, village and roadside traders, wholesale traders with their own transport and temperature-controlled storage and importers. At present none of these trading firms is large enough to dominate the market. The information needs of these traders vary but access to information relating to foreign competition and opportunities is likely to be their chief requirement. This data would include traded prices and volumes on relevant foreign markets, yield forecasts for relevant crops in relevant countries, changes on transport costs, etc.

Consumers such as retail outlets, hotels, restaurants and processors are poorly served with market information although this may change in the case of supermarket chains as they get bigger and more powerful players in the market. Some of these businesses buy informally from preferred producers but they too are not really involved in a competitive bidding process. A daily announcement of the prices paid in real transactions would help these buyers to check if they are paying competitive prices.

Input suppliers, it seems, tend to work through specialist retail outlets throughout the country. These outlets are trained by the suppliers to market input goods and to provide leaflets and other forms of information about the merits of various products. The study found no evidence, however, of an organised, impartial country-wide system for advising farmers on inputs.

Many other service providers including banks, processors, transport and storage companies as well as NGO's, planners and government agencies which assist actors in the sector, can carry out their work more efficiently if they have a better idea of the volume of trade flowing through the markets, the likely income of farmers and the contribution the industry is making to the economy. Many vitally important decisions are based on the information provided by MIS.

Chapter 2: Proposal for an appropriate, feasible MIS for Kosovo

Research has shown that the provision of market information to actors in the agricultural sector increases farmers' incomes and the volume of trade. It encourages new entrants into the market and encourages farmers to diversify into new products. Market information services also help to reduce risk, transaction costs and wastage.

Given that producers in Kosovo have much less access to the volume and type of market information enjoyed by most other European producers, and given they are expected to compete in the European market, it seems clear that agricultural development institutions and relevant government departments should have, as a high priority, the provision of useful, timely and accurate market information.

Some aspects of horticultural market practice in Kosovo work adequately in the current stage of the development of the industry. The almost universal access to mobile phones allows all actors to communicate easily to obtain what information is available. There is no evidence that traders deliberately collude with each other to reduce prices paid to farmers and it is common practice to haggle in all trading negotiations. Trading practice in Kosovo is, however, far from being transparent or competitive.

Other recent studies have supported this assertion. HPK's own Project Document (Nov 2007) describes 'unorganised and dysfunctional access to markets' in the country. In his 2008 *Market Structure Study* Andrew Sergeant found that, 'despite their knowledge of market prices, many farmers are still 'price-takers'... (i.e. rather than price-makers). He also says that 'Kosovo suffers from fragmented marketing', and that 'the quality of data on horticultural production in Kosovo is extremely weak'.

The work carried out by HPK to promote the horticultural sector in Kosovo involves a variety of activities. These include assistance with the establishment of gardens and orchards, advice on agricultural technologies, advice and assistance to extend the harvesting or marketing season using greenhouses, appropriate storage systems, processing, specific varieties and other techniques, etc. Helping farmers to produce a surplus crop does not guarantee that they will make a profit from their horticultural activity, however. Such assistance needs to be fully informed by the market conditions that prevail in the country. Failure to produce a crop of products which do not match the type or quality demanded by customers will result in failure. It maybe that poorly packed products, for instance, fetch lower prices than those with better packing which might be imported.

For these reasons and for the fact that the current, formal and informal efforts to provide market information are seriously inadequate, HPK, and others dedicated to the improvement of the contribution made by the horticultural sector, should be in favour of making a serious effort to fill the market information gap.

A market information service model for Kosovo

No two market information services are exactly alike. Each has to reflect the maturity and sophistication of the markets in question and the means available for disseminating information to the intended beneficiaries.

Actors in Kosovo's horticultural market could improve their businesses if they had access to several different aspects of the market.

Proposed price discovery component

- **Efforts must be made to ensure that reported prices are those struck in real transactions and therefore price discovery must include interviews with both parties to the deal.**

For the reasons stated above, even when this first offer price is discovered, it may not be the best price that a farmer could achieve if the market was more competitive. There are several institutions with great experience in the methodology of market price discovery and those involved in this work should seek their advice and training.

- **Since horticultural markets are volatile, prices should be gathered and disseminated as quickly and as often as possible – at least daily. It should be made clear that the prices gathered and reported are for a particular volume of transaction. Where appropriate, the prices of different varieties, qualities and packing should be separately recorded.**
- **In the context of the Kosovo market environment and with a special consideration for the information needs of the domestic producer it may only be necessary to record and disseminate prices during the harvesting season of domestic production.**
- **Although it might be useful to record traded prices for all products on the market, the most important ones are those that can be grown successfully in Kosovo which are also imported in the harvest season.**
- **The gathering of accurate prices only in the Pristina wholesale market will adequately fulfil the national requirement of accurate price provision.**

Kosovo is a very small country with relatively good roads, efficient transport and an almost universal access to the mobile phone network. For this reason prices in different centres of the country are unlikely to differ from each other to a greater extent than the cost of transferring goods from one internal market to another. The Pristina wholesale market is the largest in the country and, according to interviewees, is the market leader for the whole country.

- **All price discovery work could be covered in the six month harvest season by one junior but fully-trained, full-time individual. From the interview with a representative of USAID, which took place in the course of this study, it**

seems likely that that organisation would be willing to finance the training of a new recruit and with other costs related to operating this MIS work.

- **Traded prices of those horticultural products that are imported to, and exported from, Kosovo in significant volumes should be discovered as part of the MIS service.**

Justification for price discovery and dissemination

Accurate and up-to-date prices struck in deals between buyers and sellers represent an extremely important component of market information systems. Farmers need such data to help them decide when to sell their crops (within the limited time scale available to them), and armed with this information, they are strengthened in their bargaining position with traders. Such information helps all actors to detect price trends and to decide what margins they might expect by growing, trading or processing a particular crop.

It would be naïve to assume that traders in horticultural products in Kosovo can be relied upon to offer the best possible prices to farmers or to report actual traded prices to information gatherers, especially if they know that such reported prices are to be disseminated to farmers. Although extremely cordial relationships between farmers and traders exist, it should be remembered that the business interests of the two parties are not at all identical. The only way for traders to make a profit margin is, of course, to buy low and sell high. In my experience as a trader for 30 years and as an observer of markets all over the world, traders try their best to buy as cheaply as the law will allow and they have many strategies for doing so. Even if traders today in Kosovo are dealing extremely fairly with their suppliers, the lack of market transparency means that there is little to prevent them from dealing unfairly with farmers at any time in the future.

Although this study found no evidence of wrong-doing in the markets observed, the possibility of malpractice should not be ruled out given the high rate of certain criminal activity in Kosovo. The World Politics Review Journal of 28 April 2009 reported that the United Nations Mission in Kosovo (UNMIK) had estimated that organised crime accounts for 15 to 20 per cent of the economy. A move towards more transparent markets in horticulture would reduce the chances of corrupt practices invading the sector.

If price discovery and dissemination to actors in the value chain is to be of use then prices must be as accurate as possible. Firstly, price gatherers must consider where the information they seek comes from in the absence of any formal or documented trade.

In discussions with HPK staff it was clear that a concept of something called the 'true price' was seen as the price that needed to be discovered and reported in MIS provision. This was often interpreted as the price that traders say they will pay for a given product on a given day. Although he does not use the term, Andrew Sergeant appears to have a similar concept in mind when he states in his 2008 *Market Structure Study* report that '...obtaining market information is relatively easy. Traders and importers do not attempt to hide prices.' Rather than use the term 'true price' we should, more accurately, describe it as the traders' first offer price'.

In the few cases where Kosovo producers can compete in the export market, links should be forged with MIS providers in the appropriate regional countries with a view to share price information. This information will provide importers and exporters a means of comparing prices and improving the results of their business decisions.

HPK's is a member of the Wholesale Market Foundation which publishes market information in member countries and is part of the Central European Initiative. This source of information could be useful to any organisation operating an MIS in Kosovo.

Proposed traded volumes component

- **The volume (tonnage) of each major horticultural product traded through Pristina wholesale market should be recorded.**

Pristina market is the largest in the country and a major outlet for domestically produced horticultural crops. The market is run by Tregu, a company owned by the municipality. Tregu's officers collect a daily entrance fee from those farmers and domestic traders who sell locally produced goods and set up sales pitches in the market during the season.

- **Tregu officers should be trained to record the volumes of goods on offer and sold each day.**

Given the small land area of Kosovo, trading patterns are likely to be very homogeneous throughout the country and it should be possible to extrapolate, from data collected in Pristina and by the known volumes of national imports out of the growing season, a good estimate of national production and sales figures.

This could be achieved by first assessing the ratio of imported to home-grown volumes for a particular commodity in Pristina market for a given day during the domestic harvest season. The accurate figures can then be taken for total Kosovo demand. These are the total imports outside the domestic harvest season as published by the Customs Service. By multiplying this figure by the ratio of domestic to home grown volumes within the season a reasonably accurate idea of domestic volumes for the whole country could be calculated.

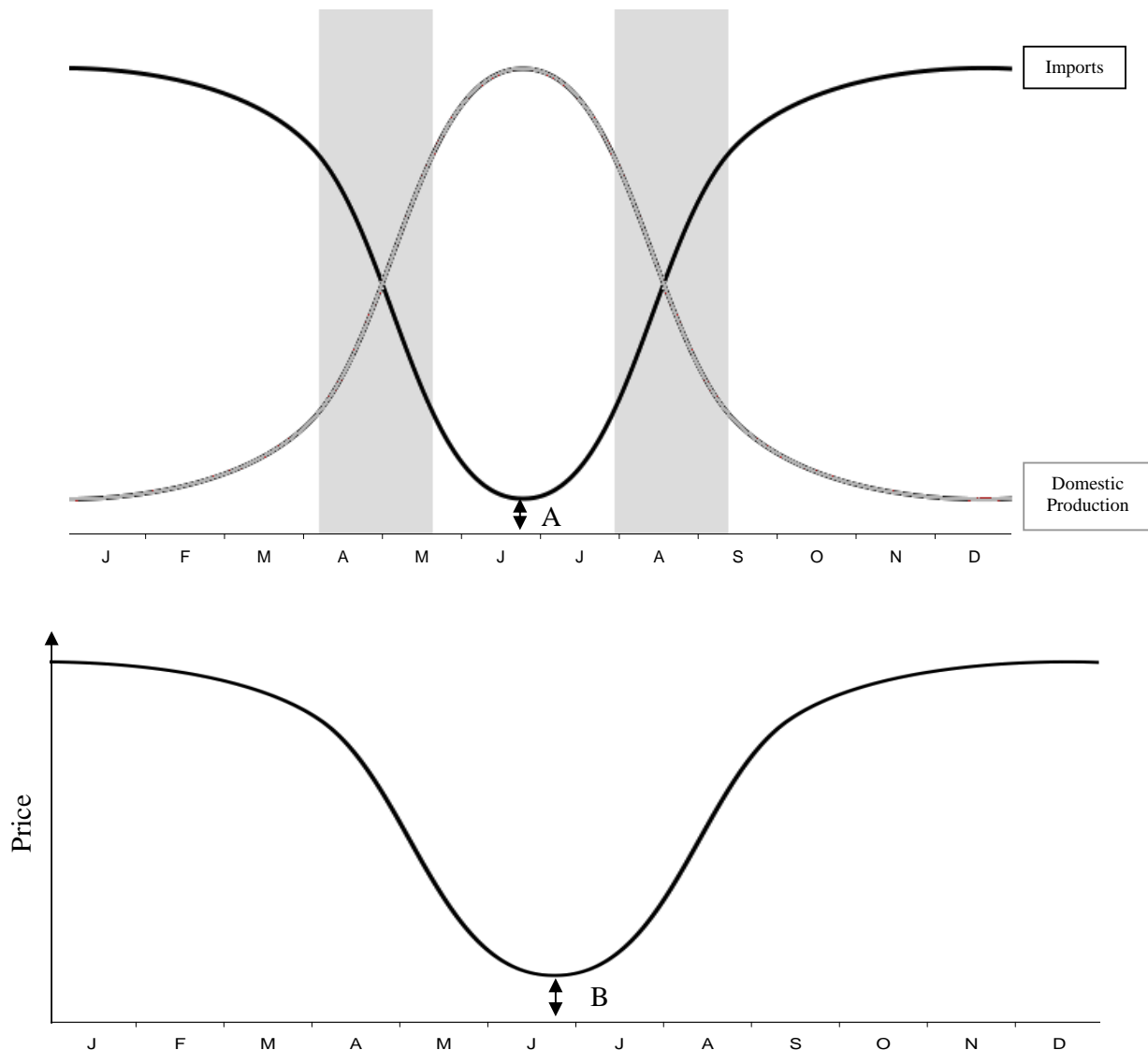
- **A short piece of research could be carried out over a few days during the season to discover the ratio of domestically produced items to imports are traded in Kosovo's other major markets to discover how typical or untypical Pristina market is in this context and to refine the figure for domestic volumes further.**
- **Since demand might be affected by price, a further short survey should be undertaken to measure the change in volumes against the changing price of imported goods outside the domestic harvest season.**

Justification for gathering and dissemination data on traded volumes

The Kosovo Customs service meticulously records volumes of all products crossing the country's borders. Such information can be accessed by anyone and HPK uses this data on horticultural products in its analysis of trade flows and competition. Unfortunately, no equivalent rigour is applied to the task of discovering the production volumes of domestically grown crops. Some institutions, notably the Agriculture Household Survey, publishes area, yield and production figures but these are widely held to be inaccurate and unreliable (Sergeant 2008).

Data on the volume of production and trade are extremely useful inclusions in the repertoire of information offered by MIS. A producer will be very disappointed to find that although the recorded price paid for one of his crops in the market is satisfactory, that particular market can only absorb, say, 20% of what he has to sell at that price. To offer more might cause a glut and a sharp fall in price. If NGOs such as NPK are helping farmers to increase production of tomatoes, for instance, then they need to be assured that the overall volume of products likely to come on to the market do not accede normal demand.

Figure 1:



The above graph offers a stylised illustration of imports and sales of a domestically grown product throughout the year. Only imports are consumed outside the harvest season in Kosovo but by mid spring the first Kosovo products enter the market. These are likely to have been produced in greenhouses and will fetch high prices. As the harvest season progresses, the volume of local product increases and prices fall only to pick up again in the early autumn. One of HPK's goals is to maximise farm earnings. One way of achieving this could be encouraging of farmers to invest in greenhouses which could reward them with high prices (in the shaded area of the graph). Before making such an investment, however, the farmers (and HPK) need to calculate the difference between the cost of the new technology and the rewards in the form of higher sales revenues. During the middle of the season local farmers would be advised to grow enough so as to cause the price to fall to a level which can compete with imports but not below profitable levels (distance B on the graph). The balance to be achieved is represented by the distance A on the graph.

At present, farmers, NGOs and service providers in the sector can use import figures to trace the curve of imports on the graph but have no access to figures needed to draw the curve on the graph representing domestic contributions to the market.

Such information would also be needed to guide farmers on the introduction of new products that could be grown in Kosovo but which, at present, are almost all imported. These include walnuts, celery, garlic, mushrooms, fennel, parsley, radishes, peas, chickpeas, root crops, chilli peppers, etc. Without a reasonably accurate estimation of domestic production volumes it would be difficult for HPK to advise growers of the quantities they should produce of any given crop that could be sold at a profitable price.

In order to calculate the total production of horticultural products in Kosovo it would first be necessary to compile a register of all growers and require each of them to declare planting, yield and sales figures. This would be a significant undertaking.

In the absence of some national effort to monitor production and domestic contribution to demand, however, measuring certain traded volumes in Kosovo could be extrapolated into rough but useful estimates of national figures.

Other proposed components of the MIS

- **A new MIS should regularly gather and disseminate information on:-**

Price premiums for different varieties of the same crop

Price premiums for different qualities of the same crop

New sales outlets

Transport costs

Relevant storage costs

Availability of credit

Availability of packaging materials

Weather conditions affecting growers

Changes in government regulations relating to trade in horticultural products

Advice on joint marketing strategies

Advice on how to take advantage of niche markets for new products

News relating to horticultural markets

Some categories of this information should be gathered by the MIS but others, including costs of services, could be made accessible to sector actors by using links to the providers of these services.

Justification for other MIS components

Other categories of market-related information which would be of great use to actors in the sector would be somewhat easier to collect. These could include transport costs, and the cost of different types of storage. (Traders often exaggerate such costs to justify low offer prices). The cost of different types of packaging and where to obtain it would also be helpful information for growers. Farmers also need to know about the market advantage of different varieties of a product and how higher qualities can attract better prices. They may also be able to benefit by knowing of new outlets for their products in domestic or export markets. More importantly, perhaps, they need market news. Typical news items could be - Onion prices have slumped because of Albanian imports. A new supermarket chain has opened up. A major road has been washed away in a flood. Fuel prices have increased. The government is considering imposing a tax on imports of apples. A wholesale market has raised its entrance fees or rent on stalls, etc. etc.

There has been some success in recent years to get farmers to join farmer's groups or associations to gain the economies of scale for purchasing inputs and harmonising production to gain higher prices by collectively marketing their output. Many tens of thousands of farmers, however, work alone and thus have a comparatively weak position in the market. Advice to help to coordinate the activities of groups of farmers vis-a-vis the market is just as important as other MIS provision and should be included in the service.

Many farmers can't or won't link with fellow farmers to gain economies of scale but their products could be sold to individual outlets – e.g. shops, hotels or restaurants, at prices that are likely to be higher than available from market traders. At some stage, the MIS might be used as a clearing house to put such buyers together with producers but advice about how to go about undertaking such marketing might be considered in the initial package of information offered by the MIS.

Individual farmers could also take advantage of the many niche markets which are opening up in Kosovo. Restaurants serving foreign cuisine use many non-traditional ingredients, and the consumption patterns of foreign visitors and tourists offers many opportunities to the entrepreneurial grower who might specialise in new crops. Advice for such initiatives could also form part of the MIS repertoire.

Dissemination

The media chosen for MIS dissemination should be inexpensive to use, easy to access and offer timely communication. In order of preference, these should be:-

- **Radio should be considered as the principle means of carrying market information to actors in the sector.**

- **A new market information service should collaborate with one popular FM radio station and arrange for short programmes on horticultural markets to be broadcast each morning especially during the harvest season. The MIS could suggest themes for each programme including information and advice on the market aspects of the sector. Free training is available for this purpose from several organisations including the BBC Trust.**
- **SMS should be considered as a means of disseminating information on traded prices. This should be done in collaboration with a local mobile phone company.**
- **The MIS should have its own web-site to display collected data and research findings based on this data.**
- **The MIS should cooperate with other media including newspapers, journals and T.V. if these institutions wish to carry MIS data.**

Justification for proposing preference for media used for dissemination

Apart from other NGOs and government departments, all interviewees confirmed that they made no use of computer-based technology to gather market information or to conduct transactions. A web-based method of information dissemination would not, therefore, be appropriate for this service.

Radio is a very popular medium in Kosovo and almost everyone has access to it. Radio programmes carrying agricultural advice and information have been broadcast in many different countries, usually in the early morning, for many years. These programmes can be listened to while preparing for the day's work and, even while travelling or working. Radio programmers are comparatively cheap to make and can be entertaining as well as informative.

In an interview at Kosovo's most popular FM Station, Dukagjini Radio, a senior executive, reacted positively to the idea of his station including a 'spot' of 15 minutes or half hour in their regular programming to carry horticultural market news, prices, advice and other relevant information using interviews, outside broadcasts and direct reporting.

The radio station executive was particularly interested in gaining Kosovo's hundreds of thousands rural people as listeners. Initially the station would expect to be paid Euros 300 for each 15 minutes for this service but if, after a few months, the independent ratings organisation found that the programme had become popular with farmers, the station could attract advertising from companies that sold agricultural-related goods and the programming would become self-financing.

The representative from USAID interviewed for this study said that it would look favourably at giving a grant of US\$ 10,000 to fund payments to the radio station for making such broadcasts.

Short Message Service (SMS)

Since almost all actors in the sector have access to mobile phones, information on prices could be broadcast using SMS. In this system mobile phone users tap out a code number on their phone for each type and variety of commodity to instantly receive a text of the price of that product.

A marketing communications expert at the leading Kosovo mobile phone service IPKO Telecommunications has said that there would be no difficulty in arrange for HPK to broadcast prices using their system. In other countries where this system has been used the mobile phone company does not charge for the service as they recover any costs from those using their phones to gain the information. The cost to HPK of this service would be the cost of loading all the collected prices into the system each day but this could be done electronically from the data base.

Web-site

NGOs, government agencies and academics in Kosovo use computer-based systems to communicate and manipulate information, and HPK itself will want to store and analyse collected price and other data for its own research purposes. A web-site for the MIS will allow it to communicate its work to interested parties around the world.

If the MIS web-site carries useful information and word spreads of this fact, more actors in the sector are likely to get access to computers and the internet and learn how to use them. This might help to introduce the huge benefits of modern communication technology to the sector.

Other media

The main objective of any MIS is to broadcast its findings to as greater number of interested parties as possible. Newspapers or TV channels should be encouraged to carry the information if they do not charge for doing so.

HPK's Sylvain Roy's recent *Concept Note* envisages an advice service for all actors in the sector which may allow for individual stakeholders to communicate with the organisation by phone to receive advice or information. Such a service could quickly be overwhelmed with demand if some system of rationing or charging is not put in place but direct access for those seeking information should not be ruled out.

Chapter 3:

Project support in the strategy and implementation

Who should establish an MIS?

It seems likely that no independent organisation in Kosovo is as familiar with the local horticultural market as HPK. This would make it an ideal organisation to undertake the commissioning of an MIS in this sector. It seems, however, that HPK in its present form may be coming to the end of its mission in Kosovo. Since HPK has commissioned this study, I assume that HPK may wish to be involved in the development of an MIS by encouraging other organisations to undertake this work or to create some new body, perhaps linked to existing staff members, which might take on this role. This is certainly the implication of HPK's Sylvain Roy's 2009 *Concept Note*.

The existing price discovery service, KMIS, was not designed to give the range of timely information which would be useful most actors in the sector. The organisation has very little knowledge of how the horticultural market works. The employees of that service lack the necessary experience and background knowledge to understand how MIS is used in the daily life of actors in the sector. I see no possibility for KMIS being capable of designing, commissioning and running a useful MIS dedicated to the needs of the horticultural sector.

Agricultural ministries run MIS in some parts of the world but most research has shown that, without the influence of stakeholders and independent financial support, governments are not good at fulfilling this task.

There may be other NGOs working in this sector in Kosovo that might have some understanding of these markets and might be interested in MIS but no interviewee was able to suggest any during this study.

I assume, from Sylvain Roy's 2009 *Concept Note*, that he envisages a way of carrying on some of HPK's work. His proposal for an Agribusiness Information and Consultancy Centre (AICC) could easily be adapted to incorporate an MIS.

I also note that the organisation's Project Document for Phase IV 2008-09 envisages the development of 'the private provision of market intelligence, including the collection and dissemination of product prices, the identification of new market channels, and their requirement, and the promotion of products and the commissioning of market studies.'

The organisation that takes on the task of providing an MIS for this sector in Kosovo should fully understand the importance of matching production to the market and should have staff members with the appropriate qualifications to understand the objectives and operation of MIS and who have familiarised themselves with the country's horticultural markets and have the trust of the actors in the sector.

Partnerships

Although the initiative to commission and operate a new MIS should be made by a single organisation (an AICC for instance), this organisation should, for some of its work, consider itself to be the hub of a wide range of sources of information and of the means to disseminate information. And, clearly, the cost of commissioning and operating the MIS will have to be met through partnerships with donors and, perhaps eventually, through the contributions of information recipients.

Information sources could include transport and storage companies, firms offering packaging materials or other inputs, weather forecasters, banks and other credit providers, government regulatory departments, other NGOs in this field, organisations offering grants to sector actors, etc. These organisations could be linked directly to those seeking the type of information they have to offer through the web-site or by including them as contributors to radio programming targeted at the horticultural sector.

The representatives of the FM radio station and the mobile telephone company have indicated that they are willing to broadcast MIS data and, assuming that the service is popular with the many thousands actors in the sector, broadcasting costs will be met by these media outlets.

Tregu, the company that runs Pristina market, are in a good position to host work in the market to collect accurate data on the volume of available domestic products and sales volumes of those commodities.

The agricultural ministry does not yet appear to be either willing or capable of making a direct contribution to the establishment of a new MIS. The ministry and all other relevant government departments are, however, possible sources of information and they should be kept fully informed of the progress of the project.

Kosovo has no national association to represent the interests of horticulturalists but several regional farmers associations are known to HPK. Traders also have representative organisations based on the market they operate from. These, as well as any other organisations representing sector actors, should be regarded as partners in the MIS from the outset. Apart from providing advice on their information needs, these organisations may eventually be strong enough to take ownership of a new national MIS.

MIS services in regional and other relevant countries should be willing to share market information.

USAID in Kosovo has already indicated that it is enthusiastic about the provision of an MIS and is prepared to fund at least some aspects of the project. Other donors should be sought to meet the rest of the costs of the service.

Schedule of tasks

On the assumption that HPK makes the decision to encourage the development of a new and appropriate MIS in Kosovo on the lines I have described, the series of actions required are likely to be as follows:-

- **Identify the organisation to be responsible for commissioning the MIS.**

This maybe a structure formed by HPK, or another similarly qualified organisation.

- **Arrange a series of meetings with potential partners.**

The representatives of producers, donors, radio, traders, etc. need to be informed of the decision to attempt to commission a new MIS. After individual meetings with representatives of these organisations a meeting for all stakeholders should be considered. These meetings will offer the opportunity to agree detailed links and shared responsibilities.

- **Carry out preliminary studies**

A study of the difference between wholesale and retail prices for the same product on the same day would help to establish if traders and/or retailers are taking a disproportionate share of the profits in the value chain. Findings from this study will help to decide if accurate, daily, wholesale prices need to be provided, especially to growers.

Once the various output components of the MIS have been agreed more detailed costing of the service can be assessed. This can be used in negotiations with donors to fund the preliminary commissioning stages of the project. These studies need take only a few days.

- **Arrange training**

Contact needs to be made at an early stage with organisations capable of offering training to employees. These include price discovery staff, those individuals involved in assessing traded volumes through Pristina market, staff required to use specialist MIS software packages for manipulating raw data into useful research evidence and, possibly, employees making or helping to make radio programmes. Such training courses are only a few days long.

FAO offer MIS training and so does the private company Sparks which is used by USAID for this purpose. The BBC Trust and Wren Media offer training for Farm Radio. TradeNet in Accra and UNCTAD offer assistance with specialist MIS software.

- **Engage the workforce**

Once offers of training have been obtained, the core staff members of the service need to be engaged. I would propose that this should consist of a project manager, a researcher and web-site controller, a price discovery officer and a part-time (during the harvest season) employee attached to Tregu to tally traded volumes. All these employees then need to take the relevant training courses.

- **Provide accommodation and equipment**

The MIS will obviously require an office, office equipment, a vehicle and computers.

- **Schedule dissemination and evaluation**

The first collections of data should coincide with the commissioning of the MIS web-site and the first farm radio broadcasts. This, again, will require a series of meetings with partners to marshal all the elements of the service for data collection, dissemination, storage and data interpretation and research. From conception to operation need only take a few weeks.

Before launching an enhanced MIS system careful consideration should be given to how the service is publicised, how to maximise the value of the data collected and which baselines to apply in order to monitor and evaluate the value of the service in future years.

Further possible initiatives

The MIS and its possible role in modernising trading practice.

At one particular stage in the process of modernising agricultural markets, traders often turn from making cash transactions for instant delivery to making contractual deals backed up by legally binding paperwork. This change releases large buyers from the uncertainty of daily haggling for supplies and makes tax collection by the revenue authorities easier. This reform cannot happen, however, unless a trusted, accurate, independent, benchmark price is established so that a supermarket, for instance, could buy white cabbage from a trader for delivery over a three month period based on the average ruling MIS price for each delivery day.

Improvements in market efficiency and transparency in Kosovo could be made but these might involve a complete modernisation of trading practice. Almost anything can be sold by auction, for instance. In many countries groups of the larger buyers and sellers meet each morning in the presence of an auctioneer and bid for boxes of fruit and vegetables. Everyone can assess the quality of the goods and can participate in the bidding process. The final bid sets the price which can then be disseminated to interested parties around the country. Prices, so openly arrived at, are the best indicator of a 'true market price' and if such prices are available for all horticultural products there would be no need for an MIS to go to the effort of price discovery.

A new MIS could encourage the adoption of these more modern marketing methodologies

Directories

The horticultural market could be better understood and organised if a directory of producers, traders, exporters and other categories of actors were compiled. Again, a new MIS might be able to undertake this task.

Sustainability

In more developed countries – the United States in the 19th Century is an example – governments realised that actors in a strategically important industry such as agriculture needed to be provided with information about the markets for their goods to reduce risk, waste and rent-seeking by traders. This service was initially provided by government but, as the markets in the industry started to mature and actors in the industry became more wealthy, information provision passed to farmers unions, formal commodity markets, news services, specialist journals, input suppliers, etc. The evolution of MIS in Kosovo is likely to take the same course but this may take some years.

The key to sustainability is, firstly, to develop an accurate and useful MIS service. Once the service has demonstrated its worth to its intended beneficiaries and to government and funding agencies, it should be easier to obtain the necessary grants to cover operating costs. And, from the outset, the partnership of farmers' organisations, media companies, market operators, and other service providers should be encouraged to contribute and to eventually take over the service.

Conclusion

At present there is, effectively, no MIS in the horticultural sector operating in Kosovo. Individual actors in the sector are not able to gather for themselves a wide enough picture of the markets that they depend on for a living. And yet, for now, and the foreseeable future, agriculture remains the countries largest industry in terms of employment.

The marketing system in the sector is rudimentary and does not allow the power of the market to set prices and send appropriate and timely signals of impending changes or opportunities for new products, new varieties, new markets and price premiums for increased quality or early production. All the good work being undertaken to improve productivity in the sector needs to be augmented with an appropriate and efficient MIS.

The evidence collected for this study supports the idea that HPK should find some means of encouraging the establishment of an MIS. In order ensure the service is efficient, sustainable and enjoys the maximum participation from stakeholders, such an MIS needs to be designed with the specific information needs of the Kosovo horticulture sector actors in mind and in partnership with the many institutions needed to make the MIS useful to the entire horticultural industry.

Annex 1:

List of interviewees

Ramadan Haxhaj – Buyer, City Park Supermarket

Remzi Makoli – Representative, Pristina Market Traders Association

Fadil Gerbeshi, Enver Gerbeshi, Afrim Osmani – Traders, Pristina market

Ilmi Maloku, Latif Menxhiqi – Tregu– Managers, Pristina market

Hakile Xhaferi – Chief, Statistical Division, Ministry of Agriculture Forestry and Rural Development

John MacKillop – Competitiveness Director, USAID Contractor

Branimir Dimitrijevic – Agricultural Marketing Manager, USAID Contractor

Gent Efendija – Vice-Editor in Chief, Dukagjini Radio

Kadri Gashi – Coordinator, Market Information System

Masar Braha – Prizren market trader

Ali Lushi, economist and farmer, Farmers’ Cooperative, Prizren

Three farmers - Mamusha Farmers Association

Ylli Vuciterna – Marketing communication specialist - IPKO mobile telephone company

Ismet Dragusha – Farmer near Pristina

Agim Deshishku – Inputs importers - F.B.M Kualiteti Gjilan

Annex 2:

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Annex 3: Terms of reference

Horticultural Promotion in Kosovo

Assessment of Market Information System (MIS) in Kosovo and Strategy to Improve the Current System

Terms of Reference (ToR)

February 2009

1- Introduction

The Horticulture Promotion in Kosovo (HPK) project was launched in 2001 with the overall goal of creating sustainable employment and income through the promotion of the horticultural-agribusiness sector, which help to improve overall rural livelihoods. The project, which started its 4th phase in January 2007, is implemented by the Swiss not-for-profit foundation – Intercooperation (www.intercooperation.ch).

In the first five years of operation, HPK mainly worked on five different horticulture sub-sectors: i) vegetables, ii) soft fruit (ex: strawberries), iii) top fruit (ex: apples), iv) ornamental plants, and v) medicinal and aromatic plants.

Source of information for fruit & vegetables crops in Kosovo

- ▶ *HPK Project* - In view of the absence of data from other sources, the Project commenced weekly price monitoring of fresh fruits and vegetables at the main wholesale market in Pristina (including the sources of produce) in March 2001 through direct interview of traders. This data has been disseminated in variety of ways including a 'Quarterly Market Trend Report'

The information has been widely appreciated and has been used in production planning with project clients – including which crops to cultivate and when. The number of subscribers to the e-mail version rose to 80 within three months of the start and included farmers, the Ministry of Agriculture, Forestry and Rural Development, NGOs, and other horticultural stakeholders. The information was placed on the Project's webpage beginning in December 2002. Dissemination of the information was also done through workshops with farmers. The acceptance of the quarterly reports, however, was not satisfactory – possibly because it duplicated other methods of dissemination.

HPK continued with collection of prices of different fresh products from the Pristina wholesale market. Data was collected and published on a weekly basis on its website <http://www.intercoopkos.org>.

- ▶ European Agency for Reconstruction (EAR) - In July 2006, the Marketing Support Project (MSP), financed by European Agency for Reconstruction (EAR), established a Market Information System in Kosovo (MISK). The main activity of the MSP was the collection of prices of different agro products (fresh fruit and vegetables, dairy products and other agricultural goods) from the seven different cities of Kosovo. Data was disseminated through a webpage developed for these purposes www.food-ks.org.
In 2008, the Market Information System (MIS), established in 2006 by the EAR-financed Marketing Support Project, continues to be managed by a local NGO “Lansimi I informatave te tregut – Marketing” (LIT-M). 50% of the costs to run the local MIS is financed by an international bank which operates in Kosovo - Raiffeisen Bank. The Raiffesien bank will support the local NGO until the end of 2009.
LIT-M continues to disseminate information through existing channels – website, daily newspapers and different national and local radio stations.
In 2008, LIT-M signed a Memorandum of Understanding with the Ministry of Agriculture for the collaboration and sharing information.

- ▶ Statistical Office of Kosovo (SOK) is engaged in consumer prices since May 2002. Data is collected on a monthly basis between the 10th and 20th of each month in 7 centres of Kosovo. Based on the data collected, SOK is publishing the Consumer Price Index (CPI), www.ks-gov.net/ESK/eng.
Prices are collected for 64 products and measures prices that farmers receive for the production that is sold outside of the sector.

2- Objective of the consultancy

HPK wishes to facilitate a better understanding of the existing MIS in Kosovo and would like to have an external opinion about how the project could support the development of a more efficient MIS for the horticultural sector in Kosovo. The main goal of the assessment would be to know how the actual system could be improved in order to help horticulture actors² make their short, mid, and long-term decisions.

The assessment, to be made by an international consultant, will help the HPK project with the following:

- a) To made a quick assessment of the MISs in operation in Kosovo (sustainability, reliability, linkages with real needs, etc.) and their impact on the overall development of the horticultural sector in the country;

The assessment should describe the different mechanisms for the price fixation and diffusion from the farm to the consumer;

Furthermore, the assessment should identify the real needs, in term of information, for the main horticultural actors;

- b) To propose a strategy (including set-up methodology) on what type of MIS would be appropriate and feasible for the further development of horticulture sector in Kosovo;
The strategies could be associated with the actual MIS or through a new system;
- c) To recommend strategic alliances, strategic steps, and project involvement and support in the implementation of the proposed strategy.

3- Expected outputs of the consultancy

² Producers, traders, retailers, processors, public institutions, etc.

The outputs of the consultancy will be:

- A full report, not exceeding 20 pages. The report should show minimally the following elements: executive summary, methodology used, findings, and recommendations. The report should be in English. The core text will be composed of the findings and recommendations related to the TOR objectives 2.a, 2.b, and 2.c presented above.

4- Suggested timelines

Items	Dates
▶ Signature of Contract	Up to April 10 th
▶ Consultancy in Kosovo	20 th to 24 th of April
▶ Delivery of the first draft	May 4 th
▶ Final report	No later than May 11 th

5- Summary of the allocated days (to be invoiced by the consultant)

The following table presents the foreseen allocation of days:

Items	Number of days
▶ Review of relevant documents prior to the mission	1 day
▶ Travel from consultant home to Kosovo and return	2 days i.e. April 19 th and April 25 th
▶ Consultancy in the field ³⁻⁴	5 days i.e. April 20, 21, 22, 23, 24 th
▶ First draft redaction (home office)	2 days
▶ Final report (home office)	1 day
Total	11 days

6- Methodology

The methodology of the assessment will consist of three main elements:

- i) study of the relevant documentation (provided by the project),
- ii) direct interaction with local and international stakeholders in MIS sector in Kosovo (e.g. through interviews), discussions with project staff members in order to understand their approaches, suggestions, and vision of development of the MIS for horticulture sector.
- iii) debriefing (wrap-up meeting) with relevant stakeholders and project officers to present the main fact findings (last half day of the field consultancy).

7- Personnel

The mission will be led by an international consultant with extensive experience in Market Information System (MIS).

³ Mainly in Pristina

⁴ Including discussions with the project staff and final debriefing

In order to facilitate the work of the consultant, HPK will provide a focal point person (a staff member – Project’s Marketing Officer), who will play the role of facilitator for the consultant. The HPK focal point will:

- ▶ Play the role of interface for the logistical issues (accommodation, local transportation, etc.);
- ▶ Organize the scheduled meetings with stakeholders;
- ▶ Accompany the consultant in all meetings;
- ▶ Permanently interact with the consultant during the strategy elaboration;
- ▶ Help the consultant in finding additional information before, during, and after the consultancy is in the field.

8- International consultant qualifications

- ▶ Excellent knowledge of market information systems for the agricultural sector;
- ▶ Former experience in the design, implementation, and monitoring of MIS;
- ▶ Excellent knowledge of modern IT;
- ▶ Experience in the development of sustainable MIS in developing and transitional countries;
- ▶ Previous working experience in similar assignments;
- ▶ Excellent oral and written knowledge of English;
- ▶ Availability in the period from mid March 2009 to mid April 2009.