NATIONAL FERTILIZER MARKETING LIMITED,

INVITES

REQUEST FOR PROPOSAL

CONSULTING SERVICES- CONSULTANT/FIRM

National Fertilizer Marketing Limited was established in 1976 as a subsidiary of NFC working under administrative control of Ministry of Industries & Production. The Government of Pakistan (GOP) Promulgated fertilizer policies in 1989 and 2001. Those policies incentivized private investment in fertilizer production (nitrogenous fertilizer, largely urea) in the country.

Over the years, the economic, technical and market circumstances have significantly changed both globally as well in the domestic market. These policies were largely urea centric and not comprehensive enough to cover all aspects of fertilizer production, marketing and balanced use GOP intends to adopt a new national fertilizer policy which fill these gaps and provides fair incentives to all investors along the production and marketing value changes as well as insure availability and supply of fertilizer to farmers at fair prices and without any undue delay to take care of crops requirement timely. The new fertilizer policy will have a medium (2030) as well as a long term (2035) perspective.

In view of above, Ministry of Industries & Production through NFML would like to engage a reputable and experienced consultant/firm in line with rule 36(b) "Single Stage Two Envelop Procedure" of the Public Procurement Rule 2004, through federal PPRA e-PADS web portal **http://eprocure.gov.pk**. The new policy will be drafted over three months (extendable) after mobilization of the consultant/firm.

Expertise Requirements

S.#	Assignment Title	Qualification, Experience & Skills
1.	Economist and team leader (1.5 person-months, intermittent).	The economist should have a Doctorate degree in economist business, and/or public policy from reputed national or international institutions. He/She should have at least 15 years of experience in economic policy research which should include experience of working for the federal Government and its agencies in policy making in the domain of industrial policy and/or agriculture linked industrial policies exposure of candidate to policy discussion on economic reforms will be given due weightage.
2.	Fertilizer industry specialist (01 person-months, intermittent).	The specialist should have a Doctorate degree in agronomy and at least, 15-20 years of fertilizer industry experience. He/She should have experience of working in multilateral institutional environment for knowhow of global best practices in the fertilizer industry.

The detailed TORs/information are available at NFML/e-PADS website which can be downloaded from **www.nfml.com.pk**. Interested candidates should submit the request for proposal/bids with Curriculum Vitae (CV) copies of Educational Degree, Certificates, Experience Certificate and CNIC through federal PPRA e-PADS web portal http://eprocure.gov.pk before closing date & time i.e. **Wednesday 3rd June, 2026 02:00 P.M** and opened on the same day **at 02:30 P.M**.

Bidders are required to deposit a fixed bid security Rs.75,000/- in shape of Demand Draft/Pay Order in the favor of National Fertilizer Marketing Limited, Lahore as per clause 25 of PPRA rules refundable of the quoted price as a guarantee of their commitment.
National Fertilizer Marketing Limited may reject all bids or proposals at any time prior to the acceptance of a bid or proposal in accordance to clause 33(1) of PPRA Rules-2004.

This tender is also available on PPRA and NFML websites.

Ministry of Industries & Production Government of Pakistan

National Fertilizer Marketing Limited

53-Jail Road, Lahore.

Telephone No: 042-99205667

Website: nfml.com.pk

Terms of Reference

Hiring of Firm/Consultants to develop New Fertilizer Policy for Pakistan

Context

The Fertilizer Policy 2001 was developed in a period of relatively abundant and low-cost domestic natural gas. Since then, Pakistan's industrial, energy, agricultural, and trade environment has changed substantially. Declining indigenous gas supplies, greater reliance on imported LNG, rising fiscal pressures, persistent market distortions, and increased exposure to external shocks have reduced the relevance of the existing policy framework.

Recent regional instability and risks to key maritime routes, including Hormuz, have further exposed Pakistan's vulnerability not only in relation to gas and Urea, but across the wider fertilizer value chain. Pakistan's fertilizer security depends on reliable access to a range of nutrients, feedstocks, and intermediate inputs, including Urea, N-P-K, Phosphate, Phosphoric Acid, Rock Phosphate, and Potash. Disruptions in the availability, pricing, or transport of these inputs can directly affect domestic production, import continuity, farmer access, crop yields, and national food security.

The current framework also does not adequately address several strategic questions. These include the appropriate balance between imported raw materials, imported finished fertilizers, and domestic processing capacity; the extent to which Pakistan should maintain local production, blending, reduction, storage, and handling capacity for strategic resilience; the need to diversify sourcing relationships and procurement mechanisms; and the importance of hedging against supply shocks arising from shipping disruptions, supplier concentration, or geopolitical instability.

At the same time, fertilizer policy should no longer be framed solely around gas allocation and Urea production while assuring a credible business environment for existing and future investors. A modern policy must address the full fertilizer ecosystem, including balanced nutrient availability, industrial competitiveness, farmer affordability, supply chain resilience, and more sustainable nutrient management practices. This also requires examining how improved agronomy, precision application, modern agriculture practices, and the utilization, processing, and recycling of organic waste can reduce excessive reliance on chemical fertilizers over time without undermining productivity.

It should be emphasized that the new fertilizer policy is not only about fertilizer production or gas allocation; it is about securing the nutrient base for affordable food, farm profitability, and soil productivity. For farmers, the policy should aim to ensure that the right nutrients are available at the right time, in the right formulation, at prices that remain economically usable. For consumers, the policy should seek to reduce the risk that fertilizer shortages, import disruptions, or distorted nutrient use undermine domestic food production, food quality, and price stability.

In view of the Ministry of Industries and Production's (MoIP) mandate to promote competitive, efficient, and sustainable industrial development, it has been decided to commission a new Fertilizer Policy aligned with current industrial, energy, agricultural, and food security realities of the country.

In terms of overall policy architecture, MOIP leads the industrial and investment architecture; MNFSR leads agronomic outcomes and farmer adoption; and National Agriculture and Food Security Council (NAFSC) provides the federal-provincial platform to align evidence, incentives, and implementation.

Objectives and Scope of the Assignment

Policy area	Issue to be addressed	Policy Objective
Vision, objectives, and outcomes	Past policy remained narrow, dormant, and largely supply-oriented. It did not establish a modern national vision for productivity, nutrient efficiency, or industrial upgrading.	Set a 10-year policy frame around productivity per acre, balanced nutrition, nutrient-use efficiency, food quality, soil health, industrial competitiveness, and delivery modernization.
Fertilizer as industry	Fertilizer is too often handled as if it were only an agricultural input category, which has enabled multiple layers of control and reduced policy clarity for investors and innovators.	State clearly that fertilizer is an industrial sector linked to agriculture. MoIP should lead overall policy architecture, industrial development, and investment direction, while agricultural institutions should support crop-response evidence and advisory use.
Balanced NPK and missing nutrients	National fertilizer use remains skewed. Potash and several secondary micronutrients remain underused despite agronomic need in many systems.	Place balanced nutrition at the center of policy. Include N, P, K, S, Mg, B, Zn, Fe and other critical nutrients where supported by evidence. Link this to crop quality, soil condition, and human nutrition outcomes.
Localized blends and crop response	Uniform product thinking does not fit Pakistan's soil diversity, crop systems, and irrigation conditions.	Encourage crop- and soil-specific blends, region-specific nutrient programs, and formulation development tied to actual crop response rather than only standard commodity products.
Phosphorus strategy	Pakistan remains highly dependent on imported phosphorus inputs, while current product strategy remains too narrow. Domestic rock resources are not being fully pushed toward higher-value solutions.	Create a national phosphorus strategy covering efficient P use, improved P formulations, local rock development, conversion into higher-value phosphate products, and alternatives better suited to Pakistani soils than a single conventional product pathway.
Bio-based and organic nutrient development	The policy debate still treats biofertilizers, biostimulants, organics, and soil amendments as peripheral.	Recognize bio-based crop nutrients as a formal growth area. Support industrial development, evidence generation, and responsible market expansion for biofertilizers, biostimulants, organics, and soil amendments.
Water-soluble and specialty products	Pakistan has not yet set a serious long-term direction for water-soluble, specialty, and enhanced-efficiency nutrition.	Set an industrial ambition for Pakistan to become a credible producer and user of water-soluble and specialty nutrition over the next decade, especially for horticulture,

		fertigation, protected cropping, and quality-sensitive segments.
Delivery systems and equipment	Policy discussion remains too product-centric and underplays how nutrients actually reach the crop.	Include fertigation systems, liquid logistics, spreaders, planters, precision placement, and drones as part of policy design. A fertilizer policy that ignores delivery technology will not achieve efficiency gains.
Soil intelligence and public evidence	Pakistan lacks a strong recurring national soil intelligence base that can guide product development and policy adjustment.	Commit to periodic national soil health and deficiency mapping, public soil map publishing, and structured use of that intelligence to guide industry, advisory systems, and public policy.
Innovation and investment climate	Innovation is being slowed by uncertainty, weak policy direction, and a history of overlapping and sometimes arbitrary controls.	Signal a pro-innovation, pro-investment policy direction. The policy should encourage new product development, local formulation capability, private R&D, and partnerships with credible research institutions without unnecessary bureaucratic blockage.
Competition and market conduct	Large-player concentration, price coordination risks, and non-level playing conditions distort the market and reduce trust.	Include policy language on fair competition, transparent market conduct, and coordination with the Competition Commission of Pakistan to discourage cartelization and price fixing.
Institutional roles	Fertilizer policy has suffered from mixed mandates and weak role separation.	Define policy ownership, research support, industry consultation, and provincial implementation roles clearly. Avoid a policy design that creates parallel technical sovereignty across multiple departments.

Key Deliverables

The Consultant/Firm will develop Policy Design and Implementation Roadmap and will prepare a new Fertilizer Policy covering pricing principles, subsidy rationalization, investment incentives, industrial efficiency, supply chain governance, strategic resilience, implementation sequencing, institutional roles, and monitoring arrangements.

Specifically, the consultant is required to produce the following as a part of this exercise:

1. Inception report covering diagnostic and policy review including industrial and market assessment of fertilizer, domestic capacity, supply chain vulnerability and sourcing assessment
2. Draft Fertilizer Policy for stakeholder review
3. Report from Consultations (consultations to be organized by MoIP)
4. Final Fertilizer Policy document after incorporating feedback from stakeholders
5. Implementation and monitoring framework

The draft policy must answer the following fundamental questions.

1. Does Pakistan have the right product or not while benchmarking the current product mix with international best practices?
2. How has regulatory framework (such as license, tax and tariff policies) for the fertiliser industry has influenced investment pattern and what changes in the regulatory framework are needed now?
3. What is the role of federal and provincial governments in implementing new fertiliser policy and offtake of fertiliser products while ensuring standardization and harmonization?
4. What is the pathway to innovation and which technological shifts such as coal gasification and green ammonia define the trajectory of the fertilizer industry?

Outcomes

The policy should explicitly commit to five national outcomes:

1. Reliable and balanced access to critical nutrients in all major sowing windows
2. Improved productivity and profitability per acre for farmers
3. Incentives for business and investment in the sector
4. Protection of farmers from supply-driven food inflation
5. Long-term soil fertility, resilience and environmental sustainability

Qualifications of Consultant/Firm

Ministry of Industries & Production through the National Fertilizer Marketing Limited would like to engage a reputable and experienced consulting firm/ Individuals to undertake this assignment. The new policy will be drafted over three months after mobilization of the consulting firm/Individuals. The consultants' team will comprise the following two experts:

a. **Economist and team leader** (1.5 person-months, intermittent) The economist should have a Doctorate degree in economist business, and/or public policy from reputed national or international institutions. He/She should have at least 15 years of experience in economic policy research which should include experience of working for the federal Government and its agencies in policy making in the domain of industrial policy and/or agriculture linked industrial policies exposure of candidate to policy discussion on economic reforms will be given due weightage.
b. **Fertilizer Industry Specialist** (1 person month intermittent). The specialist should have a Doctorate degree in agronomy and at least, 15-20 years of fertilizer industry experience. He/She should have experience of working in multilateral institutional environment for know how of global best practices in the fertilizer industry.

Annexure: Proposed Policy Metrics

1. **Access and affordability**

- fertilizer-to-crop price ratio for major crops
- retail availability during sowing window
- district-level stock-out days
- farmer travel distance or delivery time to access products
- volatility of retail prices by nutrient/product

2. **Nutrient balance and product mix**

- national and provincial N:P:K consumption ratio
- share of secondary and micronutrient products in total nutrient use
- share of customized blends / specialty fertilizers
- crop-wise and zone-wise nutrient application patterns

3. **Productivity and farmer outcomes**

- yield response per kg nutrient applied
- partial factor productivity of N, P, K
- value-cost ratio of fertilizer use
- gross margin per acre for major crops

4. **Soil health and agronomy**

- soil organic carbon
- nutrient balance or depletion/surplus by district
- soil deficiency maps for P, K, S, Zn, B and other priority nutrients
- share of cropped area covered by soil-test-based recommendations

5. **Supply security and resilience**

- import dependence by nutrient and intermediate input
- supplier concentration by country/source
- domestic production and blending capacity utilization
- number of days of strategic cover for critical imported inputs
- exposure to Red Sea / Hormuz route disruption

6. **Governance, quality, and competition**

- sample failure/adulteration rate
- registration/approval time for new products
- complaint resolution time
- market concentration indicators
- number of anti-cartel / market conduct interventions

1. **The role of NFML is clearly incorporated in the policy, NFML is designated as the policy implementation lead.**
2. **Joint Venture (JV) as well as in house participation is allowed all eligible entities can participate in accordance with PPRA rules.**
3. **The bidding shall be conducted in line with the Rule 36 (b) "Single Stage Two Envelope Procedure" of the Public Procurement Rules-2004. All the bidders shall quote their rates through inclusive of all applicable Government taxes & duties etc.**
4. **Consulting firms/Individuals are required to deposit fix bid security (refundable) amounting Rupees Seventy-Five Thousand only (Rs. 75,000/-) in shape of Demand Draft/Pay Order as per clause 25 of PPRA rules in the favor of NFML, Lahore, a scanned copy of which be sent through e-PADS along with the bid and the original must be reached to NFML Commercial Department 53-Jail Road, Lahore before the opening of the bid.**
5. **The bidding process shall be Quality & Cost Based Selection method (QCBS).**
6. **The bid shall remain valid for the period of 120 days from the date of opening of the financial bid.**
7. **Each bid shall comprise of separate sealed/stamped Technical Proposal and Financial Proposal. However, financial proposal shall not be entertained in case the technical proposal is rejected.**
8. **Payment shall be made in the ratio of 30% upon submission and acceptance of draft policy report + 30% upon approval policy report by MOI&P and +40% upon approval from Government of Pakistan or etc.**
9. **All types of reports shall be approved by Ministry of Industries & Production (MOI&P) Government of Pakistan and payment against the assignment shall be released on approval of MOI&P.**
10. **Applications complete in all aspects registered with income tax/sales tax department, SECP Companies, Government, private/Public sector organizations having relevant experience specified above in Research, Development & policy making of fertilizer sector are eligible to apply.**