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European Common Agricultural Policy (CAP) Reform and the Mediterranean Challenges

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About CIHEAM

Founded in 1962, the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM) is an intergovernmental organisation composed of thirteen member states (Albania, Algeria, Egypt, France, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Spain, Tunisia and Turkey).

The CIHEAM is at the service of its member states to promote multilateral cooperation in the Mediterranean in the fields of agriculture, food, fishery, and rural territories, aiming to respond to the needs of the States. The CIHEAM works for the Mediterranean and therefore with Mediterranean populations. Providing concrete solutions, sharing experiences and avoiding the waste of knowledge are among the main objectives of each one of its actions.

The CIHEAM pursues this cooperation mission through specialised training, networked research, scientific diplomacy and political partnership. Thanks to its activities, the CIHEAM therefore contributes to the elaboration of a global, structural and engaging vision for development in the Mediterranean.

170 permanent agents and hundreds of consultants regularly work within the 5 headquarters of the Organisation: the 4 Mediterranean agronomic institutes (MAI) based in Bari (Italy), Chania (Greece), Montpellier (France), and Zaragoza (Spain); the General Secretariat is located in Paris (France).

The Watch Letter

This Quarterly Letter has been published since 2007 and is devoted to major topics in Mediterranean Agriculture, Food and Environment.

While enabling the CIHEAM to gain a widespread recognition, it circulates analyses aimed at a heterogeneous public (policymakers, researchers, journalists, etc.) on emerging agricultural and food issues. The objective of the Watch Letter is to provide brief analyses which will fuel both the discussion on the Mediterranean and the broader global debate on food and agriculture.

The General Secretariat of Paris is responsible for the direction and the management of this bilingual publication (English and French), also available in Arabic.

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Editorial

Cosimo Lacirignola

CIHEAM Secretary General a.i.



Being the reflection of the continuous process of European integration and its adaptation to regional and global challenges, the European Common Agricultural Policy (CAP) Reform is one of the most fundamental issues to be addressed. Aiming at achieving food security, the EU CAP has accompanied the construction of Europe since its inception and its realisation in the aftermath of the Second World War.

With the growing regional and global agricultural developments, in addition to the food security issues, other new major issues including territorial cohesion, rural development and food quality emerge. Consequently the challenges related to environmental conservation and budget allocation, are increasing. Different countries do not always share a common position with regards to these challenges. How has the CAP been evolving to respond to these continuously developing objectives, and challenges, and how is this reflected in the last reform? How is the CAP reform helping Europe to position its agriculture in today's world? How can Europe contribute to the global agricultural development at a time when the food security situation is quite alarming?

Europe should especially focus on the Mediterranean region where food needs are growing. Given the historical ties that link European and Mediterranean countries, the Mediterranean region has an essential role to play in the achievement of food security at regional and global levels. How can the CAP reform be analysed from the perspective of regional integration in the Mediterranean? How do southern Mediterranean countries regard the CAP reform, and what are the efforts to be made to help them foster their relations with the EU, and with European Mediterranean countries in particular?

The Watch Letter n°27 explores the potential role of the new CAP reform in the strengthening of the Euro-Mediterranean partnership, the emerging challenges on each shore of the Mediterranean, and the challenges to be met in the framework of a regional integration on the long term. The papers and interviews published in this Watch Letter offer a diverse analysis of the CAP reform and present fundamental points of views from northern and southern Mediterranean countries. This goes perfectly in line with the CIHEAM's mission to put its studies and research at the centre of the policy debate on Mediterranean challenges.

I express my sincere thanks to the authors and all the persons that have contributed to this new Watch Letter. I would like to thank, in particular, Mr Stéphane Le Foll, the French Minister of Agriculture, and M. Paolo De Castro, the Chair of the European Parliament's Committee on Agriculture and Rural Development, two key actors of the CAP reform who kindly agreed to participate to this issue of the Watch Letter.

INTERVIEW

Stéphane Le Foll

Ministre français de l'Agriculture, de l'Alimentation et des Forêts



La réforme de la PAC, pour la période post-2013, a nécessité beaucoup de travail diplomatique et de négociations avec l'ensemble des Etats membres de l'UE. Comment jugez-vous les résultats obtenus et comment les situez-vous dans la dynamique actuelle d'une Europe fragile ? La PAC est-elle un dossier à controverses dans lequel s'expriment des positions nationales ou au contraire une belle illustration des mécanismes européens de concertation, d'équilibres et de multilatéralisme ?

Le travail a effectivement été conséquent ! Toutefois, au regard de ce qui a été envisagé, je pense que le résultat final est satisfaisant. C'est en tout cas ce que me disent les représentants syndicaux français qui ont un jugement libre sur l'action du gouvernement.

Nous avons en effet eu deux négociations à conduire. La première sous l'égide du Président de la République a été la négociation de la répartition du budget européen sur la période 2014/2020. Sous son impulsion, la France a obtenu que les dépenses consacrées à la PAC soient globalement stabilisées, ce qui constitue un succès quand certains demandaient au début de la négociation des baisses de 30%. La seconde, au niveau des ministres de l'agriculture, a permis de discuter du fond de cette politique qui demeure la 1^{ère} des politiques communes de l'Union.

Nous avons obtenu des avancées puisque, la réforme proposée permet notamment une meilleure redistribution des aides, avec la possibilité d'un paiement redistributif sur les premiers hectares, qui était une demande forte de la France, et un taux renforcé pour les aides couplées. Ces dispositions permettront un meilleur soutien au secteur de l'élevage qui est si important pour nos équilibres territoriaux.

Je suis également très satisfait de l'orientation de la réforme vers une PAC plus verte, avec le maintien dans le compromis final d'un verdissement ambitieux (à hauteur de 30% des aides directes). Cela vient renforcer l'ambition agroécologique que je souhaite porter pour la France. Je pense sincèrement qu'il s'agit d'une PAC tournée vers l'avenir et les jeunes, avec notamment la mise en œuvre obligatoire d'une majoration des aides pour les jeunes agriculteurs au sein du 1^{er} pilier. Le second pilier de la PAC, consacré au développement des zones rurales, n'a pas été oublié et je pense notamment que les approches participatives qui continuent à être soutenues permettent un développement harmonieux et efficace des territoires.

Cette réforme de la PAC a été négociée pour la première fois à 27 Etats membres dans un cadre de colégislation entre le Parlement européen et le Conseil de l'Union européenne. Le rôle du Parlement européen a été important pour obtenir des avancées majeures, notamment en ce qui concerne les possibilités de redistribution des aides en faveur de l'emploi et de l'élevage.

Enfin, je note que dans la négociation la France a constamment été au cœur du débat de par sa proximité avec toutes les délégations du Sud, du Nord, et de l'Est de l'Europe. Nous avons su également conserver un lien étroit avec le Commissaire Monsieur Ciolos qui a fait un très bon travail sur ce dossier, de même que le Président irlandais du Conseil, Monsieur Coveney et le président de la commission de l'agriculture du Parlement européen, Monsieur De Castro.

Quels sont les principaux changements introduits par la nouvelle PAC vis-à-vis des pays méditerranéens, à la fois ceux du Nord, membres de l'UE, et ceux du Sud et de l'Est qui sont des partenaires ?

Je dirai que la réforme introduit plus de souplesse pour les Etats membres dans la mise en œuvre de la PAC et une plus grande prise en compte de l'environnement. Pour les pays européens, ces éléments sont importants et c'est ainsi que nous avons été constamment en contact avec en particulier l'Italie, l'Espagne et le Portugal.

Pour ce qui concerne les pays méditerranéens qui sont nos partenaires, je pense pouvoir leur dire que l'engagement de l'Europe en direction de son agriculture peut les rassurer sur un point : nous allons rester des fournisseurs fiables pour continuer à leur proposer dans la durée des produits comme les céréales, les produits laitiers, les viandes à des prix raisonnables. En même temps, le choix du verdissement montre que nous allons conserver des standards élevés et que nous ne serons pas dans une logique agressive.

Nous serons soucieux d'être présents comme fournisseurs tout en étant à l'écoute de leurs projets pour développer leur agriculture et leur développement, notamment dans le cadre d'accords commerciaux prenant en compte les spécificités de nos filières et en particulier des plus fragiles d'entre elles.

La PAC a-t-elle une ambition pour le voisinage européen ? Estimez-vous qu'il serait opportun de renforcer l'articulation entre la PAC et la politique extérieure de l'UE, notamment dans ses régions voisines, et plus particulièrement, vis-à-vis de la Méditerranée ?

L'Union européenne, via sa politique de voisinage (PEV), a pour objectif général de bâtir un espace de prospérité et de bon voisinage avec les pays du Sud et de l'Est. Je pense qu'aujourd'hui tout le monde est conscient que cela ne sera possible qu'à condition d'avoir assuré la sécurité alimentaire de toute la zone. La sécurité alimentaire est une base essentielle de la stabilité géopolitique.

Alors, calquer la PAC en tant que telle sur les pays du Sud ou de l'Est de la Méditerranée n'aurait évidemment aucun sens. En matière agricole, il est nécessaire d'avoir des politiques adaptées aux contextes locaux à un instant donné et il est également nécessaire de parler de développement rural. Je songe notamment non pas aux littoraux ou aux zones irriguées mais à l'arrière-pays méditerranéen. Ce sont souvent dans ces zones rurales que le chômage et la pauvreté sévissent le plus. Il faut investir dans ces zones mais les investissements doivent se faire dans un cadre durable tant du point de vue de l'utilisation des sols que des ressources naturelles et notamment de l'eau. Il faut également rester vigilants au droit des populations locales et aux bénéfices que celles-ci tirent des investissements sans remettre en cause la coexistence avec l'agriculture vivrière qui doit avoir ses chances d'évoluer.

La grande majorité des pays du sud de la Méditerranée se sont engagés dans des démarches volontaristes de développement rural et il me paraîtrait très utile que des structures régionales, comme l'Union du Maghreb Arabe par exemple, coordonnent les initiatives et facilitent les échanges entre les pays de la zone, voire décident de mettre en place une politique régionale agricole. D'une manière générale, nous ne demandons qu'à partager l'expérience que nous avons acquise en Europe lors de cette formidable entreprise de construction de la PAC.

Sur la politique européenne elle-même, et donc en parallèle des accords de coopération bilatérale que la France a signée avec de nombreux pays (Maroc, Algérie, Tunisie, Turquie, bientôt Liban), deux orientations très complémentaires sont à distinguer.

- La première orientation correspond à l'ambition de créer une zone euro-méditerranéenne de libre-échange, comme prévu par les accords de Barcelone de 1995. Des accords avec le Maroc ou la Jordanie ont ainsi abouti. Les investissements réciproques entre pays du sud et du nord de la Méditerranée dans le secteur agroalimentaire se développent, et je m'en réjouis. De plus en plus, des acteurs du Sud et du Nord s'associent pour conquérir de nouvelles positions par exemple en Afrique sub-saharienne. Cela mérite toute notre attention.
- La deuxième orientation consiste pour l'Union européenne à apporter son soutien financier à la mise en place de politiques. Dans cette perspective, la PEV s'appuie sur des accords bilatéraux d'association ou de partenariat et de coopération et se décline en plans d'actions bilatéraux. Nous nous retrouvons ainsi avec une feuille de route commune, avec un programme de réformes politiques et économiques et des priorités à court et moyen termes qui guident la mise en œuvre de l'assistance financière de l'Union. Les événements dans le monde arabe en 2011 ont d'ailleurs accéléré son processus de révision et il a été décidé non seulement de revoir l'offre européenne à la hausse mais également de corréliser plus étroitement encore l'engagement et le soutien de l'UE aux progrès et aux ambitions des partenaires en matière de réformes (logique du « plus pour plus » : plus d'incitations en termes de mobilité, d'accès au marché et d'assistance financière pour les partenaires les plus ambitieux).

En matière agricole, la Commission européenne a décidé de remettre l'agriculture au cœur des priorités dans ses relations avec ses voisins à travers notamment le renforcement des capacités de production locales et de commercialisation locales. Les outils ne manquent pas, que ce soient par l'organisation de missions courtes ou de séminaires (TAIEX) ou la mise en place de jumelages. Le brassage des hommes et des idées qui en résulte est une belle opportunité de démonstration de la fraternité méditerranéenne.

Je voudrais également évoquer la nouvelle initiative de la Commission, ENPARD, qui vise un développement de long terme des territoires ruraux et qui repose sur deux piliers indissociablement liés: d'un côté la définition de choix stratégiques, et donc l'analyse des leviers de développement les plus efficaces; de l'autre côté, l'association large de l'ensemble des acteurs dès le départ. Des projets pilotes ont d'ores et déjà été montés et je suis impatient d'en connaître les enseignements. Il appartient aux pays du Sud de se saisir de ces instruments pour les utiliser au mieux au service de leur développement et de l'amélioration de leur sécurité alimentaire.

Quels seraient selon-vous les grands sujets de coopération à mettre en œuvre prioritairement pour nourrir les relations euro-méditerranéennes dans le domaine de l'agriculture, de la sécurité alimentaire et du développement rural ? Pensez-vous qu'il est possible d'aller plus loin dans cette coopération en agriculture dans le contexte géopolitique régional actuel ? La France va-t-elle prendre de nouvelles initiatives dans cette perspective ?

Si je ne devais garder qu'un sujet, je voudrais que l'on puisse ne pas oublier la crise de 2008 à la suite de la flambée du prix du blé et que nous continuions le travail engagé alors en matière de transparence des marchés, de gestion des crises et de constitution des stocks de crise. En particulier, je m'investis pleinement dans la suite naturelle à AMIS, cet outil de transparence des marchés mis en place dans le cadre du G20, qui devrait être une réflexion sur les stocks de crise. Il semble que les choses avancent. J'ai proposé à plusieurs reprises d'approfondir et de décliner ces initiatives à l'échelle régionale. L'idée d'un « AMIS pour la Méditerranée », rattaché à un Observatoire de la Sécurité Alimentaire, a ainsi été actée lors de la réunion 5+5 des ministres de l'agriculture réunie à Alger le 27 novembre. Je souhaite vivement que ces projets fortement soutenus par les autorités algériennes puissent déboucher rapidement sur des réalisations concrètes, traduisant ainsi la priorité que les autorités des pays riverains de la Méditerranée accordent à l'amélioration de la sécurité alimentaire dans la zone.

Quelles sont les attentes et les intentions de la France vis-à-vis des prochains rendez-vous stratégiques internationaux et méditerranéens à venir, comme la 10^{ème} ministérielle du CIHEAM à Alger en février 2014, l'année internationale de l'agriculture familiale en 2014 ou encore l'Exposition universelle de Milan ?

La France va porter tous les messages que je viens de développer. Il nous faut absolument maintenir la sécurité alimentaire en haut de l'agenda international. Le dialogue 5+5 de novembre 2013, la 10^{ème} ministérielle du CIHEAM à Alger en février 2014, l'année internationale de l'agriculture familiale en 2014 ou encore l'Exposition universelle de Milan en 2015 sont des événements dans lesquels tous les acteurs doivent résolument s'engager.

La France invite d'ailleurs tous les ministres de la Méditerranée à une journée d'échanges et de réflexion sur ces sujets à l'occasion du Salon International de l'Agriculture de Paris le 25 février prochain pour justement parler des liens forts entre sécurité alimentaire, agriculture familiale, développement des territoires et Méditerranée. La priorité de mon action à l'international, c'est l'amélioration de la sécurité alimentaire mondiale et au sein de cet objectif, je souhaite que les progrès soient particulièrement tangibles dans la zone qui est l'une des plus sensibles au monde en la matière, le bassin méditerranéen.

Pourriez-vous adresser un message au CIHEAM concernant ses priorités d'action futures et la vision politique en matière de coopération que la France souhaite développer à travers cette organisation intergouvernementale dont elle est membre fondateur ?

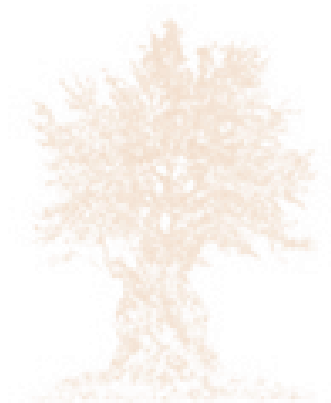
Le CIHEAM avait été créé par des visionnaires du sud de l'Europe au moment de l'Europe des 6, elle-même mise en place en grande partie sur les questions agricoles et de sécurité alimentaire. Etendue à tout le bassin méditerranéen, cette vision garde toute sa pertinence. L'avenir de l'Europe est en grande partie au sud, nous avons une communauté d'histoire et de destin.

Je voudrais tout d'abord dire que le réseau des anciens étudiants des quatre Instituts de Bari, Chania, Zaragoza et Montpellier constitue une richesse incomparable de compétences et d'expériences, et qu'ils représentent un vrai capital en matière agricole dans la zone euro-méditerranéenne. Il faut à mon sens tout engager pour faire fructifier ce capital.

En matière de recherche et d'innovation, l'agriculture de demain sera une agriculture de la connaissance, je crois que nous sommes tous d'accord sur ce point. Nous devons donner les moyens aux petits agriculteurs et aux exploitations familiales d'accéder à ces connaissances. Je suis par ailleurs favorable à ce que, pour renforcer encore le réseau, les acteurs méditerranéens qui ne sont pas encore membres du CIHEAM nous rejoignent.

Ensuite, la France souhaite que le CIHEAM continue à développer, voire à porter des outils essentiels au développement des politiques et qu'il soit le support intellectuel, le maillage profond des initiatives politiques comme le Dialogue 5+5. Je pense en particulier à la déclinaison d'AMIS pour la Méditerranée en cours de construction.

La recherche est indispensable et elle doit notamment permettre de conseiller les décideurs pour mettre en place des politiques agricoles adaptées, efficaces, et si possible coordonnées au niveau régional. C'est à mes yeux le rôle unique du CIHEAM que de faire ce pont entre science et politique dans la cette région du monde où la question de la sécurité alimentaire se pose avec tant d'acuité. Cela doit également permettre aux gouvernements de la zone de peser davantage dans les négociations internationales sur ces sujets, que ce soit à la FAO ou à l'organisation mondiale du commerce.



Dialogue 5+5

1^{ère} Conférence des ministres de l'agriculture Alger, 27 novembre 2013

A l'invitation de S.E. Monsieur Abdelouahab Nouri, Ministre de l'Agriculture et du Développement Rural de l'Algérie, les ministres de l'Agriculture des pays de la Méditerranée occidentale (Algérie, Espagne, France, Italie, Libye, Malte, Maroc, Mauritanie, Portugal, Tunisie) se sont réunis à Alger le 27 novembre 2013 dans le cadre du Dialogue 5+5.

C'est la première fois, depuis la création du Dialogue 5+5 en 1990, qu'une rencontre ministérielle se tient sur le thème de l'agriculture et de la sécurité alimentaire. Le CIHEAM a été convié comme Observateur à cette réunion ministérielle et le Secrétaire général, Cosimo Lacirignola, s'est rendu à cette occasion à Alger.



La déclaration d'Alger comporte de nombreuses pistes de coopération régionale pour améliorer la production et la productivités agricoles, protéger les ressources naturelles, accroître le partage des expériences à travers des programmes de recherche et d'innovation multilatéraux, développer les échanges agro-commerciaux, renforcer la sécurité alimentaire, lutter contre les gaspillages et promouvoir une croissance plus inclusive sur le plan territorial afin de vitaliser les régions rurales.

Le rôle historique du CIHEAM a été rappelé en ces termes dans la Déclaration, les ministres du Dialogue 5+5 : « *considérant le travail mené au sein du CIHEAM en matière de formations spécialisées, de recherches en réseau, de coopération entre Etats dans le but de contribuer au développement du bassin méditerranéen et à l'animation du débat politique régional dans les domaines de l'agriculture, de l'alimentation, des territoires ruraux et de l'environnement* ». La Déclaration d'Alger institutionnalise un segment de haut niveau composé des ministres en charge de l'agriculture des 10 pays, proposant au CIHEAM d'en être observateur permanent.

La création d'un observatoire de la sécurité alimentaire en Méditerranée, qui serait un « *lieu d'échange et de partenariat en mesure d'apporter de manière régulière, ou sur commande, une aide à la décision* » constitue également la pierre angulaire de cette Déclaration. Cet observatoire sera constitué d'un groupe d'experts issus de chacun des Etats du dialogue 5+5, animé par l'Algérie et la France, avec l'appui du CIHEAM.

The European CAP Reform and the Mediterranean area

Paolo De Castro

Chairman of the Committee on Agriculture
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Angelo Di Mambro

Journalist. Since 2010 has followed the European debate on
CAP reform from Brussels for the magazine *Informatore Agrario*



The issue of sustainability is related to the need to manage agriculture in sustainable and responsible ways, taking into consideration not only economic logics, but also the ecological and social development of productive activities.

The agricultural sector in the Mediterranean region has an enormous potential in both these dimensions. In fact, over 60% of products recognized and protected by the EU as quality products (PDO and PGI) come from European countries facing the Mediterranean Sea. From the perspective of consumption, this potential means a differentiated food supply, as an alternative to the paradigm of mass consumption, which is at "sunset". Since 2010 UNESCO recognizes the Mediterranean diet, intended as a nutritional, cultural and social model, as an Intangible Heritage of Humanity.

As the Southern frontier of the EU, the Mediterranean area is also a place of cultural, scientific, and commercial exchanges, which can represent an opportunity for the European Union. With regard to the sustainability dimension, the agricultural sector in Mediterranean countries has been throughout the years a laboratory for studying plant diseases, and it has been one of the first in the EU to develop research on the integrated pest management. The area is indeed an essential resource for the maintenance of a social model balanced between rural and urban areas, and is very important for the protection of biodiversity and the landscape. Furthermore, the Mediterranean has an increasing important role in the study and in the strategies to combat climate change. This article aims at analysing whether or not all these considerations are included in the last CAP reform.

Sustainability and competitiveness

The Common Agricultural Policy (CAP) has been one of the most significant elements in the process of European unification, launched with the Treaty of Rome in 1957. Also, it has been the most important aggregating factor and it still is the main economic and land management policy in over 50 years of EU history. In the last two decades, the CAP has been characterized by a long process of reforms, the last of which come fully into force in 2015.

The debate on this latest revision of the CAP has been articulated over two strongly related key issues: competitiveness and sustainability (Tangemann, 2011). Competitiveness issues need to be addressed in order to respond to farmers and European consumers' concerns about the new challenges of the global food supply scenario, which changed dramatically in recent years.

The framework of the new CAP reform

Looking at the general content, it is clear that the new CAP is in line with the cycle of reforms started in 1992 and continued through Agenda 2000, the Medium-Term reform of 2003 and the so-called Health Check in 2008. In addition to the primary objectives set at the beginning of the European Economic Community (i.e.: increase agricultural productivity, ensure a fair standard of living for farmers and rural area, stabilize markets and food supplies in the Community and ensure to consumer reasonable and stable food prices) the cycle of reforms has promoted a different role within the EU for the agricultural sector, with a greater focus on "quality", in all the facets this concept assumes in the different cultures of the EU.

In fact, this focus on quality has been included in a broad sense, and applied to the various segments of the supply chain and in different geo-economic areas of the EU. The CAP reforms have encouraged an active role of farmers both in the management of environmental values (such as biodiversity, landscape management, and the action against climate change) and social values (such as food safety and animal welfare). Moreover, the reforms provided incentives to dismantle the support system prices in favour of investments to increase production standards, a stimulus to the aggregation of the supply side of the food chain to make farmers more competitive, and activated the territorial policies such as rural development.

In this context, the debate over the most recent CAP reform shall be formulated within a framework that takes into account the differences and specificities characterizing an enlarged Europe of twenty-eight member countries, with different socio-economic conditions and specificities of the agricultural sector and rural areas.

Even if from the general contents perspective there is not substantial discontinuity with respect to the revisions of the past, the new CAP has been developed in a peculiar institutional and economic environment, which required applying a new methodology to reach a compromise among the parts involved in the process. The entry into force of the Lisbon Treaty in December 1 2009 has radically changed the legislative procedure of the CAP. All legislative decisions of the CAP have been approved in the procedure of "co-decision" according to which for the first time the European Parliament has equal status with the EU Council and the EU Commission in the legislative process. This has been a major change with respect to the past.

Also the austerity policies had a significant impact on the unfolding of the reform process. With an agreement between the heads of state signed on February 2013, the multi-annual expenditure ceilings (the so-called EU Multiannual Financial Framework, or MFF) have been revised downward for the first time in the history of the EU. This has resulted in animated dialectical confrontation on the CAP between Member States, the Parliament and the Commission. These tensions are also due to the reduction in the 2014-2020 agricultural budget with respect to the agricultural budget allocated for the period 2007-2013. We should take in account that the completion of the phase-in by new Member States has enlarged the number of beneficiaries of the CAP support. In other words, the increase in the number of European farmers supported by the CAP measures has not been matched by an increase in the available budget.

These new elements led to an exhausting reform process. This process started in 2010, with the launch of a major consultation in Europe and the subsequent publication of a communication by the European Commission called "The CAP towards 2020". In November 2011, the European Commission presented its legislative proposal. A first agreement between the European institutions was reached on the 26th of June 2013 and the political iter of the reform was completed in September 2013. Some of the changes introduced have also required the adoption of transitional provisions for 2014.

This long path, however, has also allowed a rebalancing of the Commission's initial proposal, with the inclusion of specific instances of the Mediterranean agriculture, initially neglected. This has been done regarding in particular the dossier on the system of direct payments and measures supporting markets (single CMO Regulation).

The new Cap and the Mediterranean area

The most obvious elements of discontinuity in the legislative proposal of the European Commission is related to the first pillar of the CAP, i.e. the support system of direct aid to farmers (Swinnen et al., 2013). In the wake of the earlier reforms, the European Commission suggested to the Member States and to the Parliament a new criterion for the distribution of resources between farmers within countries (so-called "internal convergence") and re-distribution between different countries (the "external convergence").

In the first case, the Commission proposal was to abandon the historical reference based system to move to the adoption of a uniform criterion per hectare. This has been necessary, because the historic reference represented no longer the new structure of the EU agriculture. Although it was needed to strike a new balance in the support between sectors and geographical areas, the method proposed by the Commission would have ended up penalizing the agriculture of some Mediterranean countries. Notably, for countries such as Italy or Spain characterized by farms smaller in size than the EU average, but able to have a high value-added production, internal convergence (if applied as suggested by the EU Commission) would have entailed a traumatic transfer of resources for a large numbers of farmers (De Castro et al., 2012).

Moreover, the proposal on the first pillar of the CAP included a "multi-layer" system of direct payments. The most important component was the introduction of an even stronger link between provision of support for farmers and the environmental performance that the farmer was called to put into practice. In the EU Commission proposal, the so-called greening of direct payments meant that 30% of the payment was conditional to the respect of three agronomic practices which were the same for all farms across Europe).

This would have meant serious adaptation problems for farmers. One of the most revolutionary elements of the Fischler reform was the trade-off between income support and environmental performance. In an attempt to make this aspect more binding, instead, there was a risk to weaken it. As a matter of fact, sustainable farming practices are usually very specific and related to the context. It is unlikely that a practice will have the same positive environmental externalities in different agricultural systems.

This is the main reason why the Fischler Reform allocated the "green" measures to the second pillar of the CAP (i.e. rural development) instead of the first one. Both in terms of the convergence process, and of the greening and market measures, the debate between the Parliament and the Council served to rebalance the Committee's proposal, to make it more flexible without altering its ambition. Regarding the Mediterranean agriculture, we can sum up this re-balancing as it follows:

- The process of internal convergence has been mitigated with the aim of taking in account the specific features of the Mediterranean agriculture, characterized by production of high added value with a dimensional structure of the Farms heavily fragmented. Member States will be able to choose among several options, but the amounts available for farmers who receive more than the regional/national average will be reduced in proportion, with the possibility for Member States to limit potential losses to 30%. Member States shall also have the right to appeal to a payment for the first redistributive hectare under which they can use up to 30% of the national envelope for redistribution among farmers for their first 30 hectares (or up to the size of a medium farm of a Member State if greater than 30 hectares);

- With regard to the greening, the application of the three basic practices proposed by the Commission will take into account the specific needs of agriculture in the Mediterranean regions. After the negotiations, the set of measures envisaged by the Commission (maintenance of permanent grassland, crop diversification and an area of ecological interest) has been enhanced to take into consideration issues of management for small farms and the specificities represented by tree crops, such as olive and citrus groves, and those submerged such as rice. The diversification of crops is modulated according to the size of the farm: the farmer must cultivate at least two crops if he has an arable land exceeding 10 hectares and at least three crops if the arable land exceeds 30 hectares. The area of ecological interest, amounting for at least 5% of the farmland, will apply to the majority of arable farms with an area greater than 15 hectares. Tree crops, permanent meadows and crops submerged will be exempted from this requirement.
- Against a backdrop of strong price volatility affecting the survival of farms in Europe, the reform introduces new measures to face market crises and extends safety nets in areas not previously covered by the protection of the CAP. In case of severe market crisis, the producer organizations, with specific guarantees, may take temporary measures (e.g. storage or withdrawal from the market by private operators) to stabilize their sector of activities. In addition, there are specific tools for specific sectors, most of which represents strong products of the Mediterranean agriculture. In particular, with the aim of strengthening the agricultural component of the supply chain of olive oil, the new aid will be distributed and used in accordance with the fruit and vegetables CMO model, namely through three-year programs managed by producer organizations.

For fruit and vegetables, the agreement includes new and more ambitious objectives and activities in the operational programs, strengthening the role of associations of producer organizations (APOs), which will manage the operational funds, implement and submit operational programs. Moreover, the APOs can bring the Union financial aid up to 4.75 % of the value of marketed production. For the wine sector, the system of planting rights will be replaced from 2015 onwards by a system of licensing. New measures will be available to foster innovation and support promotion initiatives targeted to the domestic market, especially for the information on Protected Designations of Origin (PDO) and geographical indication products (GIs).

For cereals, durum wheat will be included in the list of products that can receive public support. Finally, the management and programming of the supply for seasoned hams has been introduced as a concrete measure of protection of PDO and PGI products, after having already included this possibility among the measures foreseen in the so-called dairy package to safeguard the quality cheeses.

The challenge of the implementation

The CAP reform represents an opportunity for the countries of the Mediterranean side of Europe. The framework of the European support for agricultural sectors accentuates the characters of flexibility and modularity. This means that the new CAP is no longer a centralized and monolithic policy, but it will increase the "room for manoeuvre" for Member States in a support model aiming to adapt to the various European agricultures.

The new CAP represents also a call to take responsibility. It will be up to the national and local governments to gear up to the best use of the new "tool-box" of the Common Agricultural Policy, in the interests of Mediterranean agriculture.

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10th meeting of the CIHEAM Member Countries' Ministers of Agriculture



Algiers (Algeria)
6th February, 2014

At the invitation of HE Abdelouahab Nouri, Minister of Agriculture and Rural Development of the People's Democratic Republic of Algeria, and in the presence of several representatives of international organisations, the Ministers of Agriculture of the 13 member states of CIHEAM, will hold their 10th meeting in Algiers on the 6th of February 2014.

The discussion will focus on sustainable food security in the Mediterranean Basin. The issues of agricultural production, natural resources preservation, and food quality will represent the main axes of this discussion. The fight against food waste, the green growth, and the inclusive growth for rural remote areas will also be addressed, not forgetting about the cooperation to be established in the multilateral Mediterranean framework in term of agricultural, food and rural development.

Previously to the meeting, a high level seminar on the development of rural territories will take place on the 4th and 5th of February 2014 in Algiers. The conclusions of the seminar will be included in the declaration of Algiers that will establish a series of technical and political recommendations at the end of the ministerial meeting.

It should be noted that the first meeting of CHIEAM member states' Ministers of Agriculture was held in Rome in 1999. Since then, successive meetings have been held in Rabat (2000), Athens (2001), Beirut (2002), Paris (2004), Cairo (2006), Zaragoza (2008), Istanbul (2010), and Malta (2012).

The European CAP and the Mediterranean farmers' strategic objectives in the food supply chain

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Prodromos Kalaitzis

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European agri-food cooperatives constitute the main type of organisational structure of European farmers. Their main objective is to gain as much added value for their products, by building-up a more competitive business position in the food supply chain.

Cooperatives' business strategy is shaped taking into account the profile of economic interest of their members in various EU Member states, as well as the relevant policies (CAP, competition policy) and market environment conditions.

The economic profile of Mediterranean farmers is therefore of decisive importance in structuring competitive cooperatives being able to defend farmers interests in an effective manner through their activities in the food supply chain.

Smaller economic size of farms in Mediterranean countries

Farms' economic size is measured by the standard European Size Units (ESU) with 1 ESU = 1200 €, calculated on the basis of gross value added (GVA). The most recent EUROSTAT data (FADN farm structure survey 2011) shows a high divergence in the economic size of farms in Mediterranean countries, when compared to the much higher size of farms in Northern EU Member States.

In what concerns the average SGM (standard gross margin) per holding, there is considerable heterogeneity amongst the countries (graph 1). In 2007 the average SGM per holding in Spain and Italy was at the level of some 16.5 ESU (20000€) while the ESU in Portugal and Greece was around half of that.

At the same time the average ESU in the Netherlands was 111.3 ESU (133 560 €), while in other northern EU Member states it was considerably higher in comparison to the ESU level in Mediterranean countries.

copa*cogeca

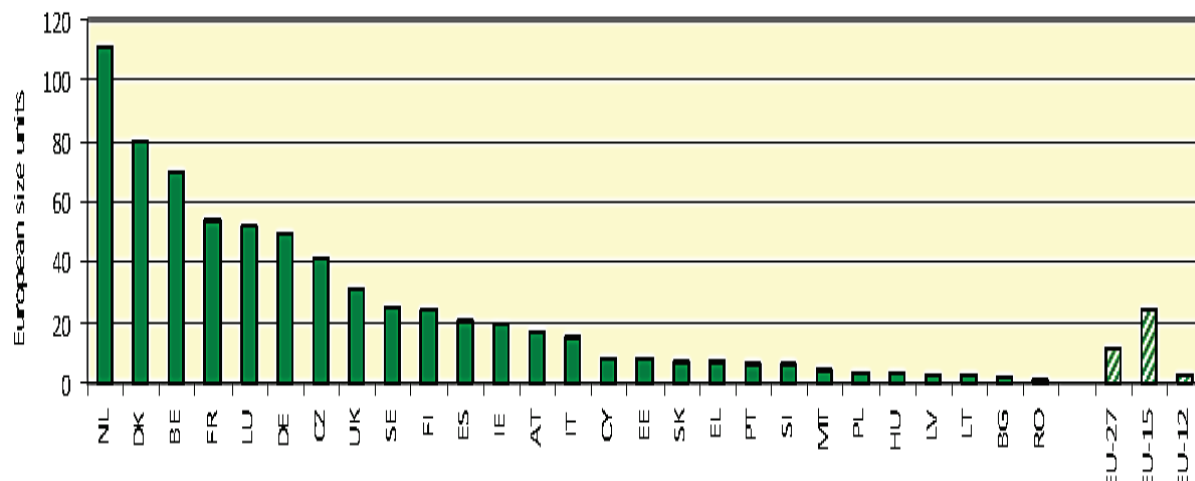
european farmers european agri-cooperatives

Copa-Cogeca is the united voice of farmers and their co-operatives in the European Union.

Copa represents 57 farmer organisations from the EU Member States. Cogeca represents 31 cooperative organisations.

www.copa-cogeca.be

Graph 1
Average Economic Size per Farm in standard gross margins in the EU (2007)



Source: European Commission, EU Agricultural Economic Briefs. What is a small farm? Brief N° 2 – July 2011
(This graph is the most recent one published by EUROSTAT)

Differences in the effectiveness of organising farmers in cooperatives and POs

The agri-cooperative sector in Europe, comprises some 38 000 cooperatives that represent some 50% of the agri-food industry. These employ around 660,000 people and generate a global turnover of approximately 360 billion euro. European agri-cooperatives present a wide range of structures, profiles and dimensions throughout the EU. Two main development trends can be identified in co-operatives:

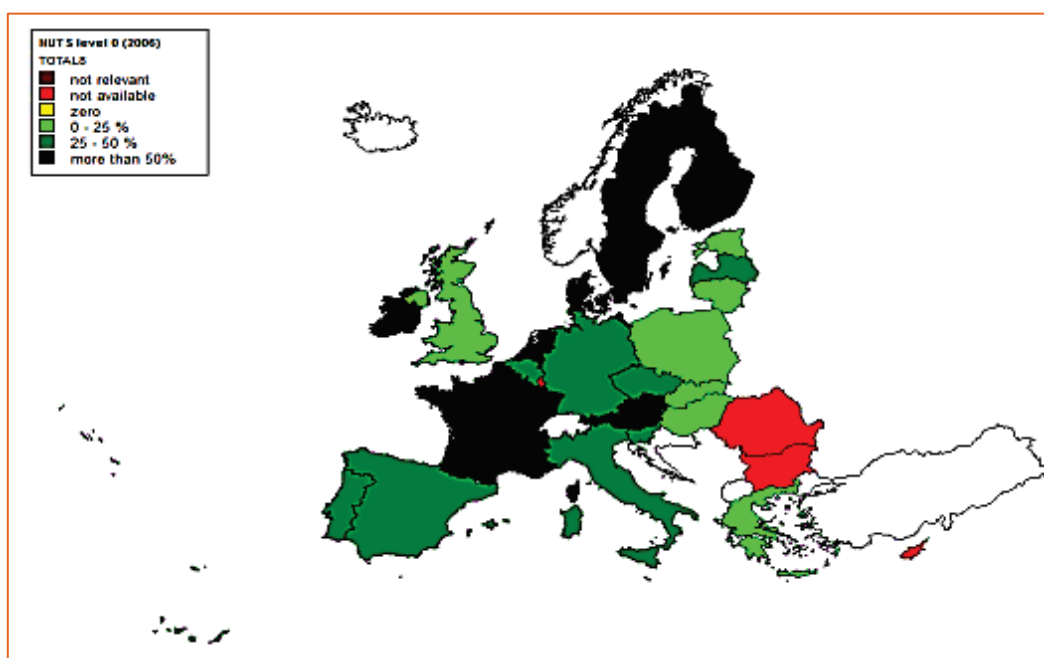
- The first and main trend can be found in market leading cooperatives that follow business strategies to improve their overall competitiveness. Thus, frequently these cooperatives follow long-term strategies for growth through mergers and acquisitions to obtain the necessary “critical mass”/size to invest and start operating at a scale where synergies can be achieved, while keeping costs at a competitive level. This model is followed mostly in Northern European countries;
- On the other hand in the European South/Mediterranean area, a tendency of spanning activities in multiple sectors exists (multipurpose cooperatives) in an effort to target local markets (Southern EU countries), while serving the pluri-activity of farmer members.

These major differences in structures are demonstrated by the global figures of Table 1 (below), referring to the number of cooperatives, their members and their cumulative turnover in selected EU Member States. The Top 50 agri-cooperatives, exceed 1 billion € of yearly turnover (two cooperatives exceed the 10 billion € threshold) and they are active in sectors such as dairy, meats, horticulture, cereals, as well as in the input-supplies and service-provision.

However, cooperatives from the Mediterranean EU Member States are listed below that level (1 billion €), and this difference in the respective size of cooperatives, is characteristic of their economic performance and their difference in terms of competitiveness in the food supply chain. Nevertheless and regardless of how important these biggest agri-cooperatives may be, we should not forget that the vast majority of the EU’s 38.000 agri-cooperatives are small and medium sized enterprises. Furthermore in some countries (e.g. Mediterranean and newer Member States), cooperatives are still underdeveloped and the existing ones face major economic challenges to survive.

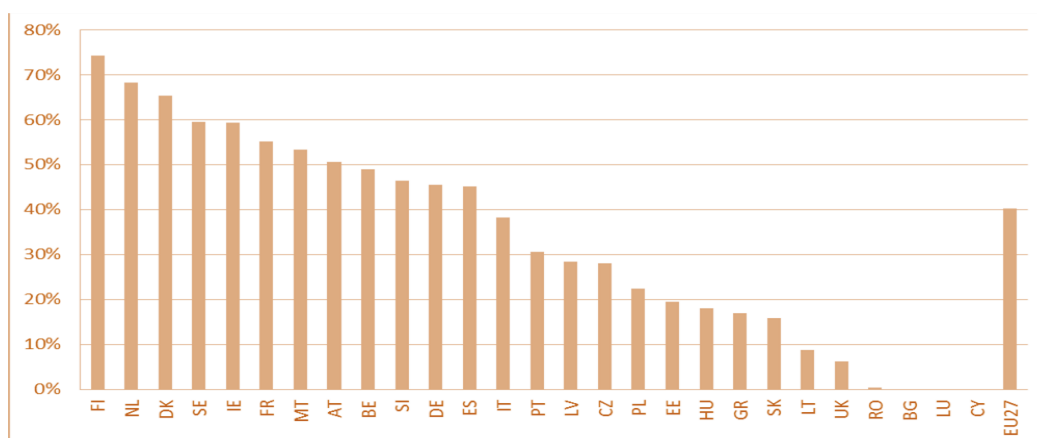
Weaker competitive position of agri-food cooperatives

The market share for cooperatives operating in the Mediterranean countries of the European Union varies between 25% and 50% (Italy, Spain and Portugal), while it remains below 25% for Greece. In contrast to that, the market share of cooperative is above 50% for some Northern and central EU Member States (Finland, Sweden, Denmark, The Netherlands, France and Ireland).



Source: Bijman, J., C. Iliopoulos, K.J. Poppe, C. Gijssels, K. Hagedorn, M. Hanisch, G.W.J. Hendrikse, R. Kühl, P. Ollila, P. Pykkönen, and G. van der Sangen (2012a), *Support for Farmers' Cooperatives; Final Report*, Wageningen: Wageningen UR.

Graph 2
Market share cooperatives, per country (2010)



Source: Bijman, J., C. Iliopoulos, K.J. Poppe, C. Gijssels, K. Hagedorn, M. Hanisch, G.W.J. Hendrikse, R. Kühl, P. Ollila, P. Pykkönen, and G. van der Sangen (2012a), *Support for Farmers' Cooperatives; Final Report*, Wageningen: Wageningen UR.

Business structure differences in Mediterranean agri-food cooperatives

The economic performance of agri-food cooperatives across the EU depends on their different business structures. Cooperatives can operate in agricultural commodity activities that being bulk in nature, are directly affected by economies of scale.

Economic size is therefore of vital importance. At the same time leading food corporations as well as food retailers operate in the final downstream stages of the food chain, commanding significantly higher profit margins and higher overall profitability.

As agri-food cooperatives gradually develop their business activities further downstream in the food chain, they need to invest in further processing and other capital intensive value adding activities such as extensive distribution, and intensive marketing support. Economies of scale are therefore once again present, but this time regarding financial aspects and capital contribution, allowing for an adequate financing of investments. The combined effect of structural factors such as:

- Total number of cooperatives: High in Mediterranean countries,
combined with a
- Members per cooperative ratio: Low
Leads to a
- Turnover per member ratio: Low for Mediterranean cooperatives when compared to those in northern EU Member States

Table 1
Number of cooperatives, their members and their cumulative turnover in selected EU Member States (2013)

EU Member State	Total Number of Cooperatives	Total members (multiple membership)	Turnover (million €)	Members per cooperative	Turnover (million €)/ cooperative	Turnover (million €)/ member
Denmark	46	64000	21500	700	467,39	0,336
Finland	40	44000	14500	1100	362,50	0,330
The Netherlands	200	140000	33200	700	166	0,237
France	2900	500000	82400	172	28,41	0,165
Ireland	150	103068	12700	687	84,67	0,123
Germany	2000	550000	41000	289	20,50	0,075
Italy	5800	900000	34362	155	5,92	0,038
Spain	3500	1100000	18889	314	5,40	0,017
Portugal	735	1044900	2600	1422	3,54	0,002
Greece	5692	974304	1040	171	0,18	0,001
Total EU average	21063	5420272	260161	6401	12,35	0,048

Compilation by Copa-Cogeca, 2013, on the basis of:
 - Cogeca, *Agricultural Cooperatives in Europe, Main Issues and Trends, 2010*, and
 - Bijman, J., C. Iliopoulos, K.J. Poppe, C. Gijssels, K. Hagedorn, M. Hanisch, G.W.J. Hendrikse, R. Kühl, P. Ollila, P. Pyykkönen, and G. van der Sangen (2012a), *Support for Farmers' Cooperatives; Final Report*, Wageningen: Wageningen UR.

This low turnover per member is a strong indicator of cooperatives' economic strength in Mediterranean countries. As a result they lack a dimension that would allow them to take advantage of economies of scale when they collect and commercialise commodities. Thus their capacity of acting as a significant countervailing power towards other stakeholders in the food supply chain is very weak or inexistent.

Equally important is the inability to concentrate any significant level of equity capital, to finance costly downstream value adding operations. This is ultimately translated to incapacity to influence contractual terms and ensure fair and balanced transactions with major food chain partner and retailers.

Mediterranean farmers' Strategic objectives to improve their competitive position in the food supply chain

The food supply chain besides being subject to an increasing concentration has also become more vertically integrated with an increasing segmentation in response to evolving consumer behaviour patterns. European cooperatives in particular, pursue and intensify their efforts to further restructure and operate in global food supply chains, through two main courses of action:

- An internal one, by building stronger and more competitive enterprises, further consolidated, with improved governance and other entrepreneurial agreements;

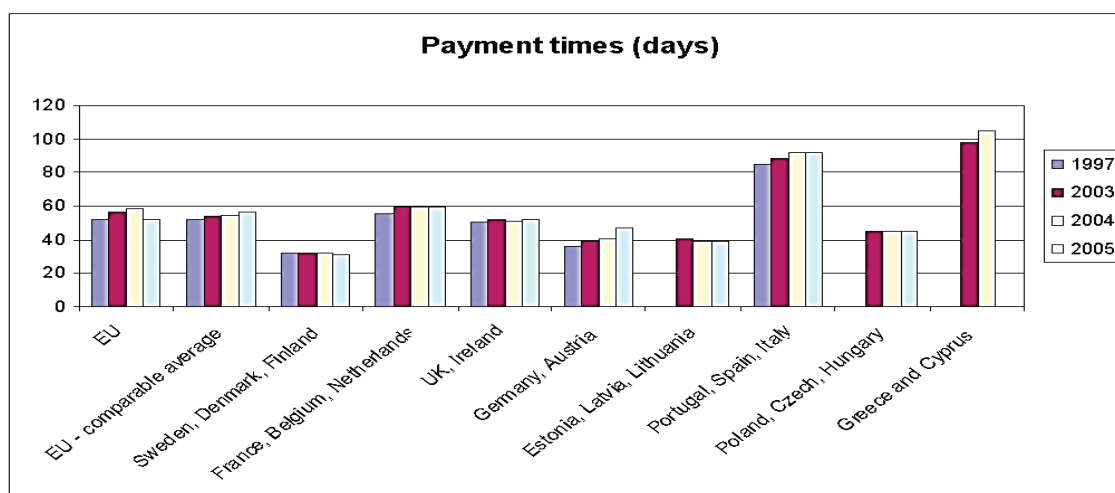
- A second one focused on pursuing a better positioning in the food supply chain. Cooperatives and farmers have less countervailing power, in particular against a handful of global retailers. They are thus subject to frequent abuses of market power. Therefore ensuring a more balanced and better functioning food supply chain is of paramount strategic importance and this can only be achieved by improving the regulatory framework.

Business strategies for agri-food cooperatives must focus on improving performance through more elaborated structures, governance and a gradual building of an improved position in the food supply chain. In practice however, and in addition to the above, cooperatives strive to develop with limited resources facing weak policy framework and public institutions.

Across the Mediterranean EU Member States small and medium agri-cooperatives struggle to maintain their short time economic viability whilst taking entrepreneurial initiatives to improve their long term competitiveness in global food markets. The entrepreneurial orientation of agri-food cooperatives at European level is therefore the single most important strategic objective that can bring about an improved competitive position of Mediterranean farmers in the food supply chain.

Late payments

Farmers and agri-cooperatives' weakness in terms of countervailing power can be clearly illustrated by the much higher delay in payment time for Mediterranean countries when compared to other Member States.



Source: European Payment Index

The "European Payment Index 2013" clearly shows that the average number of days in delay of payment for Mediterranean countries is almost triple of the one in Northern EU Member States.



Source: European Payment Index, 2013

Producer organisations in the reformed CAP

The policy framework defined by the new CAP, responds to policy priorities and challenges as well as to a new market environment. One with a high concentration of retailers, continuous consumer pressure for products of high standards and higher value but constant (or reduced) producer prices. The particular situation of Mediterranean countries, where the relative importance of fruit and vegetables was counterbalanced by the weak organisation of its producers lead to the setting up of concrete measures in the CAP – support to producer organisations – that enjoyed a recognised emblematic success.

The cornerstone of these policy measures is to provide financial resources (co-financing operational funds and operational programmes) to recognised Producer Organisations (of which the majority are cooperatives) to organise their business activities in order to adjust production to the actual demand. For this reason European farmer and agri-cooperative organisations (Copa-Cogeca) have strongly advocated and supported this policy development and welcomed, in the reform of the CAP, the extension to other sectors of the concept of POs and the role of cooperatives. This was justified by the fact that POs are much weaker in comparison with other stakeholders (mostly retailers) in the food supply chain and it is necessary to further concentrate supply.

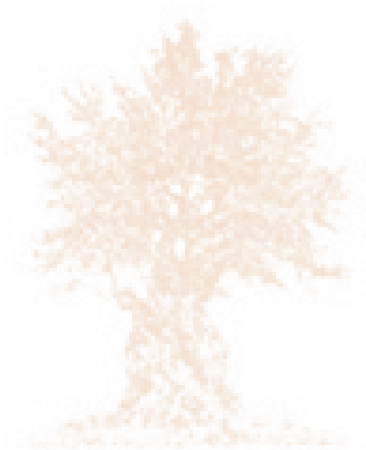
In concrete terms, Producer Organisations (cooperatives) should develop their actions aiming at increasing their economic dimension to, ultimately, increase their countervailing power in increasingly highly concentrated chains.

At the same time POs must further integrate in the food supply chain to improve the added value generated and further invest to improve quality and the level of services provided within the food supply chain. As a response to these policy objectives, the reformed CAP includes provisions to secure a more competitive and balanced food chain. To improve farmers' negotiating position in the food chain, the reformed CAP focuses on a better organisation of the sectors. Rules related to the recognition of POs and inter-branch organisations are now expanded covering all sectors and support being anchored in the Rural Development policy.

The new national/regional Rural Development programmes will offer the regulatory framework for the support of setting up new producer groups as well supporting existing POs and cooperatives in undertaking new value adding activities. In addition to that, the reformed single CMO includes provisions to allow certain competition policy derogations so that POs could coordinate the joint actions of their members in order to collectively negotiate and improve their countervailing power in the food supply chain.

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Mediterranean Plant Conservation Unit (MPCU)

The MPCU of CIHEAM-MAI Chania is a unit dedicated to the study and conservation of Mediterranean plants and to supporting educational and research activities of the M.Sc. programs of the Institute. Its main objectives are:

- Conservation of native, rare and endemic flora, either by 'ex situ conservation' (by transferring plants outside their natural habitat, such as seed collection and storage in the Seed Bank) or by 'in situ conservation' (implementing measures to preserve the natural habitats and populations of plants, e.g. Plant Micro-Reserves);
- Conservation of landraces from Crete and other regions of Greece;
- Studies and research on native Mediterranean plants (germination biology, ecology, geographical distribution, uses, threats, etc.);
- Training on plant conservation methods for pre-and post-graduate students, technical and scientific personnel of other institutions with related activities (e.g. Forest directorates, Management Bodies of protected areas, seed banks, etc.);
- Increasing public awareness about the value of our natural heritage through the creation of a demonstrative Botanical Garden and Information Centre, the publication of brochures, leaflets, and creating audio-visual material.



The MPCU participates in several national and E.U.-funded research and cooperation projects (Interreg, LIFE, FP6, etc.) and contributes to the implementation of national policies for environmental protection and in particular for plant genetic resources, as shaped by national and European legislation (e.g. Presidential Decree 67/81, Habitat Directive 92/43, Bern Treaty, CITES). The MPCU of CIHEAM MAI Chania is a member of the European Native Seed Conservation Network (ENSCONET) and of the Network of Mediterranean Plant Conservation Centres, named GENMEDA.

More information on
maich.gr/en/services/mpcu

The Fresh Fruit and Vegetables sector in perspective of the recent CAP reform

Philippe Binard

General Delegate of Freshfel Europe

The European Fresh Produce Association



Freshfel Europe is the European Fresh Fruit and Vegetables Association. The Association is the business platform for the industry and represents the fresh produce sector at the European level. Its membership is composed of operators and associations across the supply chain from production down to retail. Based in Brussels, the Association closely follows the European Agriculture Policy, the international trade in fresh produce as well the food policy at large (quality, nutrition and health claims, active substances and their maximum residue limits (MRLs)...). The activities of the Association are carried out with the objective to secure the most efficient and favorable environment for fresh fruit and vegetable production and trade, and to enhance the sector's competitiveness while stimulating fresh fruit and vegetables consumption.

In this respect much remains to be done. Consumption patterns need to be adjusted to rapidly evolving lifestyles and eating habits which are not favorable for our products. Over the last decade, the aggregate EU consumption of fresh fruit and vegetables declined by close to 20% (Freshfel, 2013a). Almost one piece of fruit or vegetable per consumer per day was lost, corresponding to a deficit of supply of 20 million tons. This alarming trend for both consumers and the sector is taking place despite a greater awareness of the positive assets of fresh produce consumption for health (prevention of non communicable diseases and responding to the obesity epidemic) but also in regard to the recognition of fruit and vegetable assets for societal and environmental concerns.

Under this background, the debate on the future of the CAP is of paramount importance. It could indeed positively or negatively influence the framework of operations for the agriculture sectors and how the products of these sectors are competing among themselves. Besides, the CAP reform is not only relevant for EU producers, but its impact might also go beyond the EU remits and in particular within the Southern part of the Mediterranean basin. The recent re-negotiation of bilateral free trade agreements between the EU and its Southern Mediterranean basin neighbours, especially with the case of Morocco, will lead to more interaction and new perspective of fresh produce trade.

The structure and competitiveness of the EU fruit and vegetables sector is therefore a key element to be taken into account. Trade in goods between both regions (excluding Turkey) today represents an EU export value of ca €120 billion, and an EU import value of ca €105 billion (Freshfel, 2013b). However, in regard to fruit and vegetables, the perspective is quite different, the EU experiencing a huge trade deficit. Exports to its Mediterranean neighbours amount to 450.000 tons, while imports stand at ca 3,2 million tons. The new agreements might improve market access for EU fresh produce, balancing the already free trade access granted by the EU for Southern Mediterranean produce.

The fruit and vegetables sector has always been one of the agriculture sectors with the smallest share of the EU budget. While contributing to close to 18% of the agriculture value output, the budget allocated to fruit and vegetables does not represent more than 3% of the EU agriculture budget. The greater part of the EU budget for fruit and vegetables is dedicated to the setting up of Producer Organisations (PO) and Operational Programmes (OP) to concentrate a fragmented production while enhancing quality and greener environment practice. This system has been in place since 1996 and represents a budget of ca. €1 billion.

The 2013 CAP reform: background

The CAP reform provides an opportunity to revise tools and instruments governing agriculture in Europe and influences directly or indirectly the fruit and vegetables sector. The "CAP towards 2020" has been on the top of the European agenda since its launch by the Commission in November 2010. After a lengthy and passionate debate, the European Institutions finally agreed in September 2013 on a new framework. It will shape European agriculture towards the next decade, with the objective of adapting and positioning the European agriculture to new local and global challenges. The deal was also backed up by the New Multi Annual Financial Framework of the European Union for the 2014-2020 period.

EU institutions advocate that the new CAP provides adequate response to the new economic, social, climate or technological environment facing the European society and introduce instruments that could assist agriculture to meet these challenges. The EU has agreed upon new parameters to guide agriculture production, ranging from a reshape of the direct payments scheme for growers, to a reinforcement of the farmers position in the food chain through instruments such as PO and interbranch organisations. It is also opening up quotas (e.g. in sugar) and provides new tools for crisis management. New instruments will also be available for addressing societal concerns such as sustainability, climate change and move growers to more environmentally friendly practices through rural development.

Any policy reform also has as a goal to streamline policies and simplify existing regulations. This complex reform is encapsulated within an impressive and worrying number of regulations and articles. More than 1000 pages for the basic texts! Moreover, the adoption of a great number of additional delegated acts will also be needed in the coming months for the CAP practical implementation details. It is disputable that this reform will effectively contribute to greater simplification and transparency of the European policy!

The new CAP reform will come into force in the course of 2014 once these additional and possibly controversial delegated acts will be adopted. This should be done under a tight deadline given the upcoming election of the European Parliament in May 2014.

The CAP reform in perspective of the fruit and vegetables sector

The new CAP will not necessarily have the same impacts for all agriculture sectors. The fruit and vegetables sector is governed since the 1996 Common Market Organisation's reform by instruments such as PO and interbranch structure. The 2013 CAP reform not only reconfirmed these instruments but also generalised them to other agriculture sectors. PO and interbranch will now be accessible for all agriculture producers. In this respect, the impact for the fruit and vegetables sector will consequently be limited as the key structure set by the fruit and vegetable Common Market Organisation CMO regulation is already in place.

The CAP reform however agreed upon a number of specific measures targeting the fresh fruit and vegetables sector. The following new specific measures could be highlighted:

- Existing PO scheme is maintained as well as interbranch structure. To improve the efficiencies of these instruments, a greater clarity should be made on the interaction between the CAP and the Competition policy. Besides, as the level of acceptance of PO remains different among Member States, a specific reform of the fruit and vegetables sector will soon be considered;
- Fruit and vegetables growers will gain access to the direct payment scheme and have their orchards eligible for these payments;
- The pre-recognition of PO, currently operating under the first pillar (direct payment) of the CAP will be moved to the second pillar (rural development). Pre-recognition is the first step for being recognised as a PO, while allowing growers to start cooperating pending the recognition process;
- The CAP re-confirms and reinforces the European school fruit scheme, by increasing the EU contribution from €90 million to €150 million to reinforce the role of the accompanying measures which become eligible for EU co-financing;
- The entry prices regime will be reviewed to secure the compatibility of the scheme with the custom code. The details of the necessary amendments will be elaborated during the first semester of 2014, for implementation as of the new campaign in October 2014.

Moving ahead to respond to the needs and expectations of the fruit and vegetables sector

So overall, the changes to the fruit and vegetables sector resulting from the CAP reform are therefore expected to be minimal. But as the CAP reform is finalising, the launch of a new reform of the fruit and vegetables sector is still in sight before the finalisation of the current Commission term. The European Commission could indeed unveil some plans before the end of the year 2013 to make the structure for producer organisations more reliable and/or more attractive.

This upcoming reform should address specific interests of Commissioner Dacian Ciolos, namely the weaknesses and lack of attractiveness in some Member States (mainly Eastern EU) of the PO scheme. On the one hand, the reliability of the OP has been challenged in recent years by a lack of clarity of the provisions ruling the functioning of the PO and their programmes. This lack of clarity has been detrimental for several PO in particular in the western part of the EU. On the other hand, the EC Commission would like to foster the attractiveness of PO in particular in the Eastern part of the European Union where the level of organisation of the producers is often well below 20%.

These aspects are important and need to be addressed. However, one cannot overlook the broader picture and the current fresh fruit and vegetables supply chain challenges. A recent initiative report from the European Parliament by the MEP rapporteur Anthea Mc Intyre (European Parliament, 2013) depicted the wide range of issues that might need to be addressed to gear the sector towards a greater competitiveness and growth. Stimulating consumption and exports are two important objectives to gear the sector towards more competitiveness. These important aspects however do not seem to be on the Commission agenda.

Earlier in this article, the worrying trends of consumption was highlighted, Europe being confronted with a rapidly growing rate of overweight and obesity affecting its population and reaching epidemic levels. Unhealthy eating habits have a huge cost for social security. It is estimated that combined national social expenditures for unhealthy eating habits reach €200 billion in the EU, while in contrast the overall EU budget for fruit and vegetables promotion are not even reaching €200 million.

More budget allocations need to be made available to the sector to boost consumption. In the EU market, fresh produce compete with highly marketed and competitive agro-food products, which often (mis)use the positive image of fresh fruit and vegetables to boost their sales. The fresh produce sector and public authorities need to be more proactive to remedy to some of the preconceived ideas that fruit and vegetables are expensive, are not convenient enough or are not safe enough! All these "clichés" are undermining efforts undertaken by the sector to secure a better accessibility and availability and to boost the consumption. Research and innovation should also take a greater place in the sector to better position it, with a view to introduce better production practice and improve quality and availability of fresh produce offered to consumers both within the EU and internationally.

In a recent Euromonitor barometer consumers indicated that they were associating a healthy diet with a regular intake of fruit and vegetables and were also indicating that they were keen to change towards a better diet, rich in fruit and vegetables. This process need to be supported by public authorities to convert these good intentions into effective healthier consumption habits. This implies that European and national policies should be more proactive in supporting a healthier diet and recognising the preventive role that fresh fruit and vegetables have on non-communicable diseases. A wide scanning of policies could help to identify the loopholes in current policies, going well beyond the boundaries of the CAP.

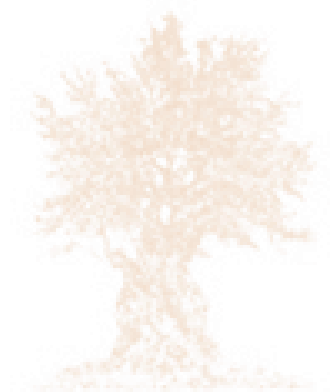
Should health become a key determinant of policy impact assessment, several policies should be reviewed including - on an non exhaustive basis - nutritional and health claim policies, fiscal policies, rules of public procurement, promotion priorities... Clearly in this broader picture, the CAP reform is only one part of the equation for the strength and competitiveness of the European fresh produce sector. Let's at least start by taking the benefit of the CAP reform and securing at the earliest the phasing in of the new school fruit scheme!

Finally, and in regard to the fresh produce trade between the Southern Mediterranean countries and the EU, it will be important to monitor the outcome of the discussion regarding the delegated act on the single CMO and in particular the provisions for fruit and vegetables import as captured in the article 137. In the reform process, this article which regulates the entry price regime will be revised to align the scheme with the Custom Code provision.

This exercise might indeed have an impact on the trade flow, on the administrative workload for administration and operators and limit the flexibility of operators on their custom clearing procedure..... Such a reform, if going through might not only restrict trade but also lead to a contradictory effect of pushing the market downwards and unfairly penalised high value products imported on consignment. Developing consumption should be done with the larger scope of high quality fresh produce varieties for the benefit of consumers.

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La mise en œuvre de l'initiative ENPARD (Programme européen de voisinage pour l'agriculture et le développement rural) se poursuit dans les pays pilotes

Après un programme de développement territorial en Egypte et un autre d'accompagnement à la réforme du conseil agricole au Maroc, à l'identification desquels l'équipe ENPARD du CIHEAM-IAM Montpellier a contribué, un programme d'actions pilote ENPARD vient d'être approuvé pour l'Algérie. Doté d'un budget de près de 10 millions d'euros, il mobilisera une contrepartie algérienne équivalente et permettra d'accompagner la mise en œuvre de la Politique de Renouveau Agricole et Rurale au niveau territorial dans quatre wilayas, en focalisant sur des thématiques prioritaires et sur des méthodes et instruments à même d'en renforcer l'efficacité. La Tunisie, qui a également souhaité mettre en œuvre un Programme d'Actions Pilotes sur quatre Gouvernorats, entame les dernières étapes de finalisation de ce programme qui devraient aboutir début 2014.



Parallèlement, les programmes d'accompagnement au dialogue sur les politiques agricoles et rurales et leur mise en œuvre ont été au cœur des activités ENPARD des derniers mois dans les 6 pays pilotes aujourd'hui concernés par cette initiative (Algérie, Egypte, Jordanie, Liban, Maroc et Tunisie).

Un deuxième séminaire régional ENPARD se tiendra par ailleurs à Bruxelles du 14 au 16 janvier 2014 à l'initiative de la Commission européenne (DG DevCo et DG Agri), avec pour objectif le partage d'expériences et de bonnes pratiques pour l'élaboration des politiques agricoles et rurales. Ce séminaire s'inscrit dans un agenda multilatéral dynamique en Méditerranée, avec la première conférence ministérielle du dialogue 5+5 sur l'agriculture à Alger le 27 novembre 2013 et la dixième réunion des ministres de l'agriculture des pays membres du CIHEAM qui se déroulera aussi dans la capitale algérienne le 6 février 2014.

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The European CAP Reform viewed from Turkey

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The eagerness of Turkey to seek close cooperation with the European institutions has started more than half a century ago. Turkey's membership in the Council of Europe dates back to 1949. Turkey applied for associate membership in the European Economic Community (EEC) in 1959. Association agreement (Ankara Agreement) with the EEC was signed in 1963, aiming at bringing Turkey into a customs union with the EEC and, ultimately, membership. Eventually, Turkey reached 'candidate country' status in 1999 (to the European Union (EU), the EEC being renamed the EC and constituting one pillar of the EU established in 1993 by the Maastricht Treaty). Accession negotiations were launched in 2005.

During this long period of EU-Turkey relations, the most significant development was the establishment of Customs Union Decision starting from 1996. As a result, all but agricultural trade barriers between Turkey and the EU were removed. Since then Turkey has been harmonizing its tariffs with the EU's Common External Tariff. Accordingly, Turkey has been also expected to engage in negotiations and sign preferential trade arrangements with third countries. Mutual trade liberalization in agricultural products has been left to the preferential trade agreements.

The most recent reform of the EU Common Agricultural Policy (CAP) is not expected to have serious repercussions in Turkey. This stems basically from two important developments in the recent years related to the mutual change of attitude towards the accession of Turkey to the EU. In fact, major EU member states (Germany and France) have openly declared their opposition. Furthermore, fueled by the economic crisis in Europe, the support for the accession has reached all-time low in Turkey (EC, 2013).

The accession negotiations are proceeding at a slow pace. The only completed chapter is Science. Furthermore, the negotiations of eight important chapters (including agriculture) cannot even start due to the veto of some member states. The only action that is going by the book is the transfer of Instrument for Pre-Accession Assistance (IPA) funds from EU budget.

The CAP Reform and the Agricultural Policy Scene in Turkey

According to the almost final agreement reached by the Council, the Parliament and the Commission in late September 2013, radical reform of CAP has been delayed to the next multi-annual financial framework. The pressure of competing demands on the EU Budget to meet the sustainable growth and competitiveness objectives set out in the EU2020 Strategy, was not enough to undertake a comprehensive overhaul in the structure of CAP payments.

In summary, decoupled single farm (and area) payments in Pillar 1 have been kept, accompanied by disproportionate cut in the overall rural development budget. The "greening" features of both Pillar 1 and 2 payments are watered down through exceptions and reduced funding for Pillar 2. No change in the trade policy is foreseen without any push from multilateral trade negotiations; the only exception may be the complete removal of export subsidies.

The divergence in agricultural subsidy schemes of Turkey and CAP increased since 2006. As opposed to the increasing share of direct payments in the EU, Turkey preferred to keep high protection intact together with providing production subsidy from the taxpayers. Reform of agricultural subsidization in Turkey started as a part of the macroeconomic stabilization and structural adjustment program in 2001. The reform program was comprehensive enough encompassing not only budgetary cuts, but also changes in the trade policy and the structure of transfers to agriculture. As expected, full-fledged implementation of the program was not possible and the program ended in 2009. Transparency in the budgetary supports to agriculture was achieved. The initial transition of less market distortionary budgetary support through fixed area payments had been gradually abandoned. Close to 70% of budgetary expenditures in 2012 can be considered as fully coupled to production.

The recent CAP reform program is basically related to the disbursement of budgetary expenditure and hence may have limited impact on the trade flows with Turkey and other Mediterranean countries. The major determinant of agri-food trade flows in the Mediterranean Basin is the preferential trade agreements with the EU. Hence, as long as the CAP keeps the status quo, the impact of changes in the CAP is bound to be restricted.

Drastic changes in agri-food trade occur whenever the production in EU falls short of consumption. For instance, when olive production in EU decreases, first imports from Tunisia increase. If needed, additional supply comes from Turkey. The positive impact on the exports is usually offset by the destabilizing effects on the market.

Impacts of trade liberalization with the EU and Accession

Dudu and Cakmak (2013) use a Computable General Equilibrium (CGE) model to estimate the economic impact of liberalized trade with EU and also the accession of Turkey. The model covers the Turkish economy as a whole. Main sectors of the economy are each represented with production activities using labor, capital, rain-fed land, irrigated land and water together with intermediate inputs supplied from other sectors.

The agricultural sector is disaggregated to 13 activities: wheat, maize, rice, other cereals, oilseeds, sugar beet, other field crops, fruits, vegetables, dairy, meat, other livestock and other agricultural production. The rest of the economy is represented by 4 manufacturing (food, textiles, energy and other manufacturing production) and 2 services (private and public services) activities. Foreign trade is disaggregated into 5 trading partners: EU27, Middle East and North Africa (MENA), North America, Rest of Europe and Rest of the World.

Baseline scenario represents business as usual case and it forms the benchmark for the other simulations in which we try to mimic the growth of the economy between 2008 and 2020. Two different scenarios are implemented with the model. The first simulates the extension of Customs Union Decision to agricultural products. In this scenario, all tariffs applied by Turkey to EU imports are unilaterally eliminated. The second one is the accession to the EU, which includes subsidies to agriculture arising from Pillar 1 payments in the EU CAP. The total amount of transfers starts with USD1.4 billion and gradually reaches USD1.9 billion in 2020.

The main Results

Results at the macro level indicate that Turkey may have three times higher welfare gains (measured by equivalent variation) under the accession scenario compared to trade liberalization only. The reflection of the welfare gains on the Gross Domestic Product (GDP) is generally small, mainly due to the small share of agriculture in GDP. Trade liberalization in agriculture is also likely to have a limited overall effect under the current structure of the Turkish economy. Small change in the total value added indicates limited feedback effect. In fact the main drivers of change in the GDP are imports and domestic consumption. If trade is liberalized, the positive contribution of domestic demand is overwhelmed by the negative effects of imports on GDP.

The most prominent effect of trade liberalization is observed in domestic prices. Prices decline for all agricultural commodities under both scenarios, but more significantly under accession. Prices of wheat and other field crops decline by more than 5 percent, while oilseeds price falls by more than 3 percent. The importance of price changes is directly related to the protection level. The higher the protection is the more significant the effect is. Imports of almost all sectors under both scenarios increase. Increase in agricultural imports is higher than the increase in manufacturing imports under trade liberalization, while under accession manufacturing imports is higher. That is, under the accession scenario increasing the subsidies in agriculture, which should eventually boost the agricultural production causes manufacturing production to decline and this decline is compensated by imports. The most significant increase in imports is observed in wheat, dairy products and other cereals among the agricultural activities; imports of oilseeds and maize decrease. The significant increase in imports from EU27 substitutes the imports from other trading regions.

The change in exports differs considerably depending on the scenario: the effects are negligible under the trade liberalization scenario, while in the case of accession, exports of rice, food, maize, fruits, oilseeds and other field crops increase significantly. The difference between the two scenarios can be attributed to the dynamics of the domestic markets for agricultural commodities. In fact, the increasing demand due to elimination of non-tariff measures and higher domestic support, boost exports in case of accession. Change in exports to the rest of the trading partners differs substantially for wheat, maize, oilseeds, other field crops and food. This implies that the real driver of the change in exports to the rest of the world may be the increase in subsidies, since the trade measures for the rest of the world remain intact.

The effects of both scenarios on agricultural production appear to be important. Cereals are generally more affected compared to the other activities, especially under the accession. Production of highly protected cereals declines between 2 and 4.5 per cent. The upsurge in maize and oilseeds production is significant since the current protection in these commodities is not high, and with increasing subsidies they become relatively more competitive. Generally, the declines get smaller while increases get higher as the degree of integration improves.

The increase in the production of fruits and vegetables is relatively small. This is in contradiction with what is suggested in the literature: fruits and vegetable production is expected to boost due to increasing demand for exports from EU, at least with the removal of non-tariff measures or in case of accession. However, in reality, the increase in exports has a limited impact on production, since the share of exports in production is already high and the protection is low in the base year.

The changes in employment and in the use of rain-fed land and water are insignificant. Capital accumulation increases under all scenarios. This is due to the increasing investment. The effects on irrigated land and irrigation water use diverge between the two scenarios. In fact, increasing the agricultural subsidies boosts the use of these factors, while trade liberalization without the CAP payments causes a significant fall. The underlying reason is the increasing substitution of domestic commodities with cheaper imports which brings about an upsurge in the use of the factors with a flexible employment closure.

Consumption increases under both trade liberalization and accession scenarios as a result of declining agri-food prices and increasing –or at least non-decreasing– household incomes. However the increases are negligible under trade liberalization, whereas they are rather significant under accession. The most prominent increases in agri-food consumption occur in rice, milk, and processed food. Increasing access to food can be considered as an indicator of improving food security. On the other hand, while Turkey is a net exporter of food in the baseline, the situation does not change much under trade liberalization. The ratio of food exports to imports declines from 1.83 in the baseline to 1.67 under trade liberalization and to 1.79 in accession scenario. This is due to the higher increase in food imports compared to the food exports. The share of imports in consumption increases, while larger proportion of production is exported under all scenarios. However the difference between the value of imports and production, and the values of exports and consumption also increases. This leaves more intermediate inputs for the food industry.

Conclusion

The recent reform of the EU CAP was not even close to the planning phase that included transferring funds from agricultural subsidies to the development of the state-of-the-art technologies. Basically, the support structure encompassing both the budgetary expenditure and trade measures remained almost intact, mainly due to the deep economic crisis in some member countries. This reform will not have any impact on Turkey and also on other countries in the Mediterranean Basin. Radical reforms have been postponed to post-2020 period.

Under the prevailing conditions and assuming that Turkey remains as a candidate country, the various scenarios results studied above suggest that the Turkish economy is capable of accommodating the adverse effects of further trade liberalization in agri-food products. The highest level of welfare effect is close to 1 percent of baseline household consumption. As expected, changes in GDP are small in all scenarios.

Imports from the EU27 countries increase significantly and this causes domestic prices to decline under both scenarios. Consequently, production levels of some major agricultural commodities fall. Since the decline in domestic prices is lower than the tariffs imposed to the other trading regions, prices of agricultural imports from the other regions become relatively expensive causing volume of trade to decrease. This causes aggregate imports to decline. Hence, trade liberalization with EU causes a trade diversion effect and decreases imports from other trading regions.

Trade in the agri-food products is highly protected in the Mediterranean basin. The average protection of the sector in Turkey and the EU are close to each other. The EU is the major export market for almost all non-EU Mediterranean countries. A complete overhaul of the preferential trade structure in agri-food products is necessary to pave the way for more competitive agriculture in the South and East Mediterranean countries. The current and extremely primitive way of assigning commodity preferences through bilateral trade agreements (such as fish and tomato to Morocco, onion to Egypt, tomato and melon to Turkey, olive to Tunisia), is far from achieving higher level of competitiveness in the exporting countries; au contraire, this approach may even decrease future export capability by enforcing unsustainable use of natural resources.

Recently, the Turkish government started to question the costs and benefits of the Custom's Union Decision with the EU. This should be considered as an important signal that Turkey is not willing to remain in the "perpetual candidate" position forever. Under the current conditions, we can expect the accession negotiations of Turkey with the EU to return to a "serious" track if the political hurdles imposed by the EU are eased and the macroeconomic conditions in some EU member states become optimistic.

All chapters may not be completed before 2020. The beginning of the convergence of agricultural policies of Turkey to the EU ones may be delayed to late 2010's. The potential radical reform process of the EU CAP may clash with the membership negotiations of Turkey. This reminds us the EU-10 enlargement in 2004 that was preceded by the most radical reform in the EU CAP.

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Mediterra 2014

Logistics and Agro-Food Trade

The 2014 edition of Mediterra is entitled "*Logistics and Agro-Food Trade. A challenge for the Mediterranean*". This new Report will be published in January 2014 and available in French and English.

Agro-trade development in the region is more and more determined by the abilities of Mediterranean countries to equip themselves with modern infrastructures aimed at facilitating exchanges and merchandise trade flows. This new edition of Mediterra suggests the reader to explore issues linked with trade and logistics within the global framework aimed at building food security in Mediterranean countries.



This report will be made of a series of articles on geo-economic trends in agricultural trade in the Mediterranean (with Europe, the United States, Brazil, Asia, Sub-Saharan Africa), logistic challenges for strategic product exchanges in the region (cereals, fruits and vegetables, meat, olive oil, fish, etc.) and the existence of adapted infrastructures that are conditional to trade (ports, corridors, multimodal platforms, cold chain, etc.)

Like each report of Mediterra, the report is intended to provide analyses and interpretative aids for a broad public (students, researchers, journalists, etc.) as well as the community of players operating in the Mediterranean (public and private sector players).

The 2014 edition of Mediterra has gathered more than 70 international experts from about twenty countries. This report is a new contribution of the CIHEAM to the progressive reflection that it has aimed at establishing over the years.

The Reform of the European CAP and the Future for the Mediterranean: A Maltese perspective

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The Reform of the Common Agricultural Policy (CAP) agreed in 2013 stands out first and foremost in terms of the novel inter-institutional decision-making process employed, and its effect on the substantive policy decisions taken. Under the rules of the Treaty of Lisbon, the European Parliament became a fully-fledged co-decision maker along with the European Council, and no longer a mere consultee.

The evident result has been to give greater validation to the democratic base of the Reform, with MEPs submitting over 700 amendments to the Agriculture Committee to better reflect the concerns of the diverse and multitudinous stakeholders and constituencies involved.

A multi-institutional and complex reform

Inevitably this has also drawn out the process over a longer period and rendered it less certain, with an agreement over the legislative texts agreed among the governments of 27 Member States in June 2013 not being finalized by a First Reading Agreement with the EP before the end of September 2013, and then again not before significant demands for change.

For the first time, parts of an agreement by Heads of State in the Multi-Annual Financial Framework concerning the fundamental issues of financing and country-specific financial envelopes were overridden by a lesser body (the Council of Ministers) in the September Council through pressure applied by the EP. Besides changes in the comitology procedures used to determine annual envelopes for rural development allocations which effectively give the EP a power of review, the last-minute amendments also alter the funding packages afforded to two Member States (Portugal and Cyprus) facing financial difficulties.

The process and outcome regrettably led to at least two Member States (Poland and Czech Republic) to object to this mandate in view of how altering the balance of the agreement reached by Heads of State threatens a fundamental principle of institutional certainty within the EU. The dynamics of the lobbying process between the EP's Agriculture Committee (and particularly its influential rapporteurs) and the Council will doubtlessly need to be studied further as questions arise on whether all Member States have equal access to the same consideration in this late inter-institutional phase as they do within the Council process among other governments.

These considerations are particularly troubling for smaller Member States in view of their having less access to influencing decisions taken in the EP, compared to that which their seat at the table in Council guarantees.

In policy terms, the new process has resulted in visible increases in progressing the environmental performance of the CAP thanks to the firm stances taken by the EP, although the overall result is likely to fall short of expectations by environmental lobby groups. The fundamental issues at stake for a large part of the process were what levels of financing and flexibility each Member State would be afforded in each 'pillar', with pillar 1 including direct aid envelopes and EU-wide market measures, and pillar 2 containing the resources and tools to achieve environmental public goods through country-specific rural development programmes. This issue was also inextricably linked to the broader question of 'equity' in the varying rates of direct aid paid in different Member States (see further below) and the Commission proposal to even a part of this out by allowing a number of Member States falling below the EU-average of direct payment per hectare to progressively increase their share to reach a determined minimum rate. At European Council level, this also involved reaching a compromise as to who could 'shift' amounts between pillars and by how much.

The consequences of this are far-reaching not only in terms of competitiveness on the internal market (which country's farmers get more direct aid) as pillar 2 funds can be transferred to pillar 1, but also on the resources made available for achieving environmental outcomes through a transfer in the opposite sense. The EP showed its mettle by demanding limits on the transfer of resources away from pillar 2 in September 2013 (rejected by Council) and also during late negotiations with Council held in June 2013 wherein they obtained concessions for raising the bar by removing so-called 'Payments for Areas with Natural Constraints' (an area-based payment for disadvantaged areas) from the mandatory percentage of the rural development envelope to be used for environmental outcomes, as well as raising this percentage from 15% to 25%.

While arguably reflecting better a broader based public perspective on the CAP's expected public goods returns, from Malta's perspective as a small island state with the highest pillar 2 to pillar 1 ratio in the EU, this type of negotiation proves ultimately much more uncertain as the rigorous and detailed analysis on the impact of legislative changes carried out over more than two years in Council and with the European Commission is ultimately brushed aside during this late phase, with less margin of manoeuvre available to flag potentially serious repercussions at the level of individual Member States.

Malta's whole territory is considered a disadvantaged area because of its geo-climatic circumstances – a reflection of objective difficulties faced by Maltese farmers as well as a situation where maintaining rural areas is critically important in halting the spread of urbanization. This state of affairs differs from that in mainland Europe, and hence Maltese agricultural is supported more strongly by the environmental payments of pillar 2 than through direct aid. The balance of its CAP package is therefore also reliant on a thorough analysis by the European Commission and a number of specific derogations, which cannot easily be altered without comprising their effectiveness.

The change in the negotiating dynamic is a reflection of two main factors: the change in institutional balance wrought by the Lisbon Treaty, whereby the sovereign Member States are no longer involved in the final discussion, with the Presidency negotiating on their collective behalf; and the 'outlier effect' where production models which have characteristics that strongly diverge from the mainstream EU models are inevitably of secondary importance in the last lap.

From Malta's point of view the framework in this reform which places significantly increased discretion with the Commission in determining specific adjustments at country level through the comitology process to many of the rules is a positive evolution, as it increases the possibility for 'tailoring' of measures to address specific and actual domestic circumstances in certain areas.

'Equity' and Rates of Direct Aid

A theme which dominated the first part of the reform was the expectation by several 'new' Member States (mainly Eastern European which joined the EU in 2004) to obtain higher rates of direct aid per hectare to address what was perceived as a strong imbalance, consequent to a number of historical factors. Direct aid takes the lion's share (approx 80%) of the annual €43Bn CAP budget and is the main income support mechanism for farmers, however individual Member State envelopes vary greatly in terms of the ratio of pillar 1: pillar 2 support, with the new Member States having far more balanced allocations compared to the direct aid heavy 'old' Member States. Table 1 below exemplifies the data used by the European Commission to frame the divergences in rates of aid across the EU.

While politically this debate was framed as one about the 'equity' of the CAP in terms of moving towards greater convergence around a European average within the 2014-2020 timeframe, and to remove the links between present aid to farmers from historical (coupled) subsidies, the net effect created several problems for certain groups of farmers in some Member States.

Certain commentators observed (ZAHRT 2010) correctly that certain productions which in the past were not strongly subsidized such as fruit and vegetable production would be negatively affected. Table 1 gives an idea of how Member States fare in terms of the 'juste retour' concept by analyzing total CAP receipts against their national EU contributions, and helps to frame an understanding of the political dynamic adopted by heads of state at the talks on the multi-annual financial framework on financing.

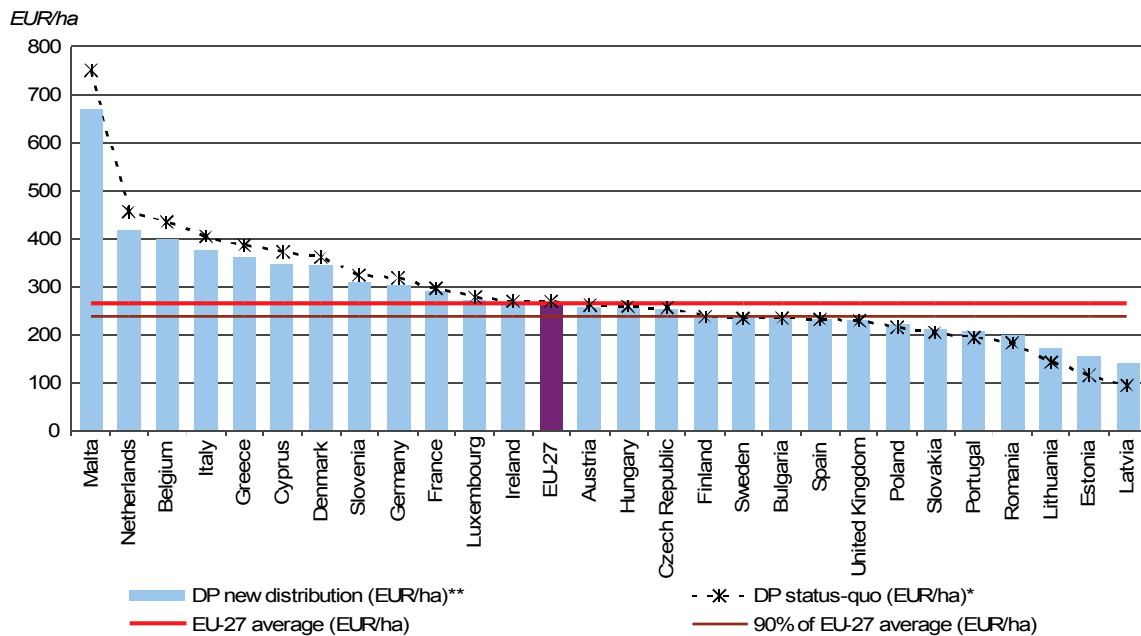
Table 1

Member states	Receipts	Contributions	Net balance	Change	Return ratio
Austria	752	1045	-293	-65,78	0,72
Belgium	615	1396	-781	-93,38	0,44
Denmark	1049	988	61	-49,70	1,06
Finland	571	743	-172	-46,27	0,77
France	8521	8113	409	-459,92	1,05
Germany	5853	8826	-2973	-528,65	0,66
Greece	2217	1018	1199	-65,43	2,18
Ireland	1341	567	774	-38,83	2,36
Italy	4370	6251	-1881	-268,87	0,70
Luxembourg	37	120	-83	-8,76	0,31
Netherlands	898	1810	-912	-80,36	0,50
Portugal	606	651	-45	-28,53	0,93
Spain	5139	4325	814	-250,33	1,19
Sweden	771	982	-211	-59,99	0,79
United Kingdom	3988	4692	-704	-312,09	0,85
EU-15	36727	41526	-4800	-2357	0,88
Bulgaria	580	144	436	234,03	4,04
Cyprus	53	74	-21	9,46	0,72
Czech Republic	909	538	372	217,93	1,69
Estonia	101	56	45	25,69	1,80
Hungary	1319	349	970	347,76	3,78
Latvia	146	73	73	36,04	2,00
Lithuania	380	111	269	101,43	3,43
Malta	5	24	-19	-0,81	0,21
Poland	3045	1204	1840	769,06	2,53
Romania	1264	527	737	497,74	2,40
Slovakia	388	284	104	88,21	1,37
Slovenia	144	152	-8	30,34	0,95
EU-12	8336	3536	4800	2357	2,36

Source: European Parliament (2010/117/EU, Euratom), Definitive adoption of the European Union's general budget for the financial year 2010; Council Regulation (EC) No 73/2009.

In the EU Members Mediterranean Countries, this new political concept gave rise to a second technical problem: a number of island and coastal areas often feature high-cost forms of production which are intensely supported in view of their economic, environmental and social importance. In Malta's case, the strategically crucial dairy sector commanded a majority of the total annual direct aid ceiling in spite of these farmers having no matching grazing or pasture land – this led to the skewed impression presented by the European Commission that an average farmer in Malta receives over €500/ha (see Graph 1), whereas as can be seen in graph n°2 below, the average entitlement distributed to land farmers after deducting the special entitlements for dairy farmers amounts to €213/ha – below the EU average:

Graph 1



Graph 2

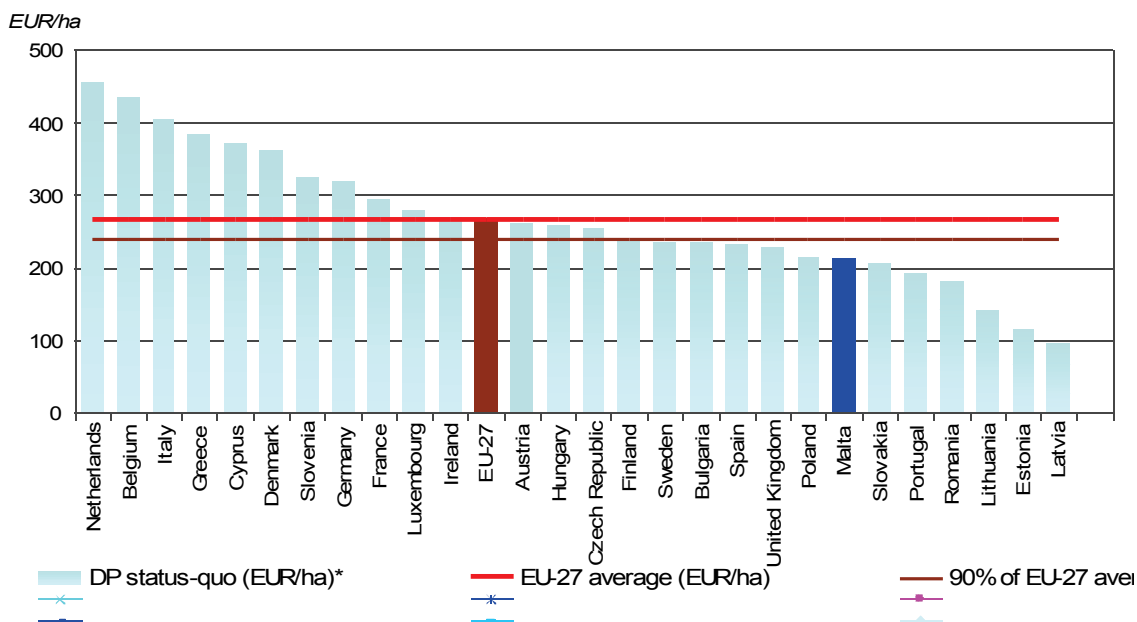


Table 2 below shows one simulation and the expected outcome on pillar 1 envelopes under a variety of scenarios. One notes that highly-competitive sectors in certain Member States would have been among those most strongly penalised, with Malta the biggest relative loser in most scenarios:

Table 2
Simulation and the expected outcome on pillar 1 envelopes under a variety of scenarios

CONSERVATIVE		PROGRESSIVE		GDP-LOW		GDP-HIGH	
Winners		Winners		Winners		Winners	
Latvia	48%	Latvia	96%	Latvia	87%	LU	53%
Estonia	32%	Estonia	65%	Estonia	57%	Latvia	53%
Romania	18%	Romania	37%	Romania	40%	Estonia	37%
LU	18%	LU	37%	Lithuania	31%	Austria	20%
Lithuania	16%	Lithuania	32%	Portugal	21%	Spain	19%
Portugal	12%	Portugal	24%	Spain	17%	Sweden	15%
Spain	12%	Spain	23%	LU	14%	Lithuania	14%
Austria	10%	Austria	20%	Austria	12%	UK	14%
		Sweden	14%	Slovakia	11%	Portugal	13%
		UK	14%			Finland	12%
Moderate		Finland	12%	Moderate		Romania	12%
Sweden	7%	Slovakia	10%	Poland	8%		
UK	7%			Sweden	8%	Moderate	
Finland	6%	Moderate		UK	8%	Ireland	7%
Slovakia	5%	Poland	3%	Finland	7%	Slovakia	2%
Poland	1%	Ireland	1%	CZ	0%	France	-2%
Ireland	0%	CZ	-3%	Ireland	-3%	CZ	-4%
CZ	-1%	France	-5%	France	-5%	Germany	-5%
France	-3%	Slovenia	-8%	Slovenia	-5%	Poland	-6%
Slovenia	-4%			Bulgaria	-8%	Slovenia	-6%
Germany	-5%	Losers		Germany	-9%		
Italy	-7%	Germany	-10%			Losers	
Denmark	-8%	Italy	-13%	Losers		Italy	-10%
Cyprus	-9%	Denmark	-16%	Italy	-10%	Denmark	-10%
Losers		Cyprus	-18%	Hungary	-12%	Netherlands	-13%
Bulgaria	-10%	Bulgaria	-19%	Cyprus	-13%	Cyprus	-14%
Hungary	-10%	Hungary	-20%	Denmark	-13%	Belgium	-14%
Netherlands	-11%	Netherlands	-22%	Belgium	-18%	Hungary	-19%
Belgium	-11%	Belgium	-22%	Netherlands	-18%	Bulgaria	-23%
Greece	-16%	Greece	-33%	Malta	-24%	Greece	-25%
Malta	-16%	Malta	-33%	Greece	-25%	Malta	-26%

The political negotiation within the MFF eventually struck a more pragmatic balance to cater for these different expectations and discrepancies, with the total envelopes and transfer mechanism between pillars meaning that countries have more flexibility to ensure adequate income support - in Malta's case, the net outcome could signify up to a 30% increase in pillar 1 support.

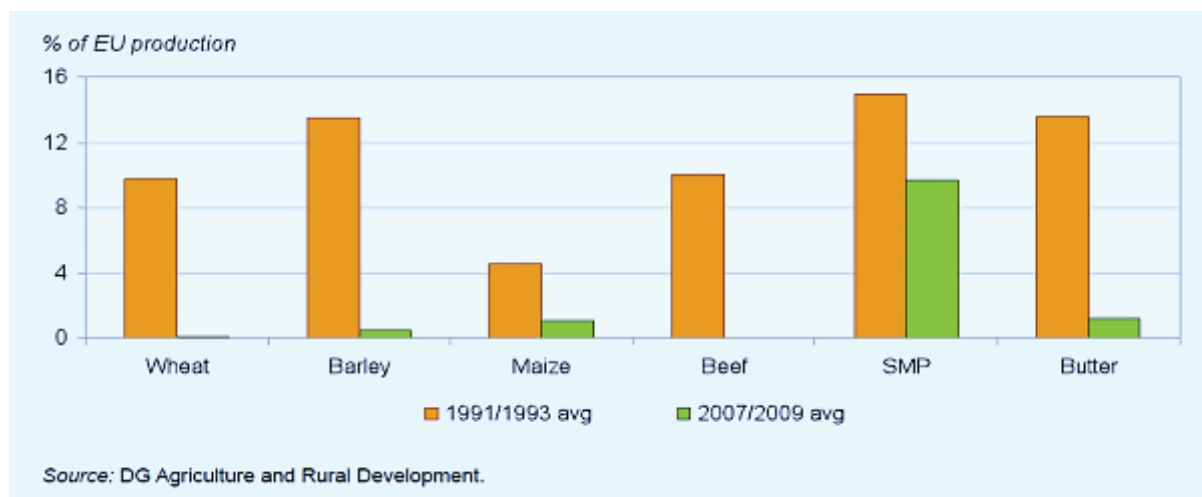
The Single Common Market Organisation

Perhaps the element which most drew the attention of observers from third countries is that which affects the running of the specific sectoral markets, known as the Single Common Market Organisation. One overarching theme in this sense is the handling of crisis measures in the light of the experiences gained since the 2008 food

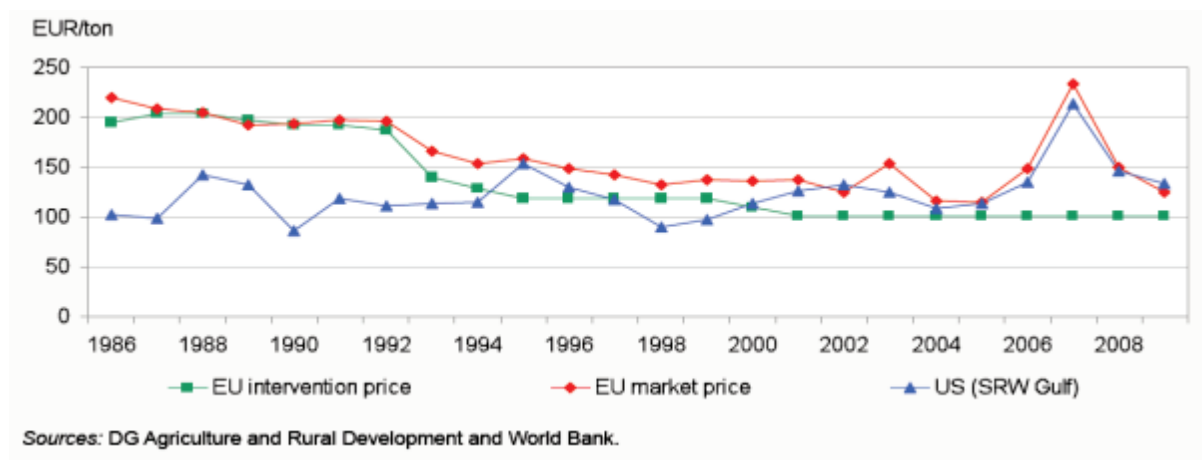
price crisis. Establishment of a crisis reserve at EU level to give the EU Commission the tools and financing to address rapidly market failures such as those in the poultry sector in 2006 (avian influenza), cereals in 2008 or even the milk market difficulties of 2010 became a priority.

In a setting of restricted budget ceilings, this has come at the expense of a real risk of triggering the financial discipline mechanism whereby horizontal cuts to direct aid at EU-wide level may be used to finance intervention measures in times of crisis. The European Commission's objective remained to continue the lowering of public stocks as well as intervention prices to serve only as a stabilisation mechanism in times of real crisis without artificially stimulating non-market based production.

Graph 3
Evolution of EU public stocks as a share of production



Graph 4
The role of reference pricing in intervention policy
with an example (wheat in nominal prices)



Over the long-term, this trend may signify a parallel intensification of lobbying efforts by the EU on the international and regional stage to put in place a stronger global market information system for staple foods such as cereals (AMIS) to avoid disruptive shocks - the new toolset makes EU producer countries arguably more vulnerable, whereas net importer Member States (including Malta) may find more willingness by EU partners to keep import tariffs for certain commodities at low levels.

While this may serve as a deterrent to curb excessive clamouring by Member States to call for an interventionist market policy and give more market-led orientation to production (complemented by the setting of reference prices for public intervention at 'safety-net'

levels which are arguably more effective in dissuading excessive-production) over the medium-term, the policy-shift again led to the 'equity' argument to rear its ugly head. The issue in this case concerns the minimum amounts below which financial discipline does not apply, with direct payments below €2,000 being thereby exempt.

The controversy involved Member States with a prevalence of large-pay beneficiaries which argued that the burden should be borne equally by all producers regardless of size - and those who argued for a wider exemption for small to medium producers set at €5,000 such as Cyprus.

While tailored rules were adopted for specific sectors prior to the reform (such as the milk sector with the so-called 'milk package'), trade-affecting measures in the sugar and wine sector remained an important part of the negotiation - one whose outcomes will remain topical beyond 2020. In the sugar sector, where the 2006 reform was intended to see quotas phased out in 2015, this has now been extended to the 2016-2017 marketing year to strike a balance among the political pressures by European beet growers, preferential country producers and non-preferential countries.

Similarly the wine sector, for which a termination of the 'vine planting rights' system was foreseen in 2016, obtained an extension under for the 2016-2030 period on what amounts in practice to an opt-in system, with Member States with less than 10,000 ha of plantings being able to opt-out. Although this issue was discussed at a High-level working group for 8 months, it remains unclear how this system tallies with the logic of the 2007 wine reform or indeed what the medium to long-term competitive outlook for different categories of EU wines will be like.

Greener income support?

One of the stated objectives and the more controversial issues in the new CAP is the drive to link levels of direct aid to environmental targets by using new instruments which essentially divide the entitlement into 'layers', with a basic payment set a certain percentage of the applicable ceiling for payments, with additional payment conditional upon the application of certain environmentally beneficial practices from a set menu which includes crop diversification, maintenance of permanent grasslands and keeping of ecological focus areas.

One of the difficulties faced by Mediterranean countries in this approach is that the actual options available for them to keep their full income support can be rather limited and place them at a disadvantage: for instance diversification would be difficult to apply to farms with only a limited amount of arable land and to specific cultures (for example permanent crops, for example vineyards or orchards, horticulture), whereas the approach appears to be more straightforward for farmers who have permanent grasslands. The EFA option includes certain features which are better suited for Mediterranean-types of farming and particularly the circumstances of coastal and island areas, including terraced farming and landscaped features, and is likely to be the prevalent model for greening in this area.

Given the relative small budget, the Maltese greening component will be comparatively high in comparison to the basic payment. However, in view that the average holding size in Malta is less than 1 hectare (Malta's National Statistics Office, 2011), the majority of the farmers will be exempt from the greening obligations. Approximately 93% of the Maltese farmers will be eligible to participate in the Small Farmer Scheme, thus only a small proportion of farms will be obliged to implement the Greening measures. The remaining small number of farmers, around 40 will be required to respect the requirements of Crop Diversification, while 12 farmers must establish or maintain Ecological Focus Areas. Since 92% of the land in Malta is terraced and around 30% of the parcels contain landscape features, Maltese farmers should not encounter difficulties in implementing the agricultural practices beneficial for the climate and the environment.

For the period 2014-2020 Malta will be focusing the Rural Development Programme around five themes:

- Water, wastes and energy
- Quality Produce
- Sustainable Livestock
- Landscape and environment
- Rural economy and quality of life

The activities arising from these themes will link to the six EU-level strategic priorities for Rural Development as set out in the EAFRD Regulations for the CAP post 2014. Theme 1 aims to reduce the input costs and improving the energy and water use efficiency. The creation of quality assurance schemes, adding value to produce and improved marketing will be financed under Theme 2. The economic and environmental sustainability of the livestock sector will be achieved through increased competitiveness by increasing the production efficiency under Theme 3.

The Maltese landscape is rich in biodiversity, culture and historic values which are important assets for the tourism sector. Theme 4 aims to conserve and enhance the landscape and its biodiversity through agri-environmental measures, landscape management and restoration of small scale on-farm infrastructure. The objectives of theme 5 will be achieved through support to small enterprises micro-business to improve the rural economy and farm diversification. Leader actions are foreseen to be key players in the delivery of this Theme.

The new RDP will provide the opportunity to new projects which combine scientific research with farmer learning and training aiming to drive innovation and sustainability. Priority will be given to activities intended to investigate water and fertilizer use with the aim to protect the water and soil resources while improving the farming efficiency. Another approach as part of the European Innovation Partnership will be the elaboration of techniques to improve the sustainability and quality of forage production.

The Mediterranean dimension

In retrospect, it is inevitable to observe that there continues to be little by way of specific considerations on regional processes in the CAP Reform debate, include the Mediterranean processes. One possible explanation may be that related to political timing; the debate on this reform co-incided with the political fluxes of the Arab Spring coupled with a clear EU tilt towards negotiating regional Economic Partnership Agreements with various global players in view of the stalled progress on the Doha Round. With non-Mediterranean EU Member States being more concerned with the competition on various markets from the US and BRICS countries, and Mediterranean Member States needing to tread with caution on aspects of trade liberalization for sensitive products (in view of the domino effect of concessions) and recognition of geographical indications, the Mediterranean agenda had little or no priority in the debate. A second consideration is that at EU level, these two processes remain largely distinct, with the lead responsibility for negotiations lying with Trade, rather than Agriculture Ministers.

While the European Commission has sought to try and achieve better integration of programmes by finding synergies between instruments such as the European Neighbourhood and Partnership Instrument and the European Agricultural Fund for Rural Development, it nonetheless appears less straightforward for it to find collective political fora for gaining traction on the core agricultural and food issues with these countries. This aspect was highlighted by the Agriculture Commissioner Dacian Ciolos at the CIHEAM Ministerial meeting on Food Security held in Malta in September 2012, wherein he underscored the important role that CIHEAM plays as a forum which brings together 13 Mediterranean countries at high-political, technical and academic level, and expressed his hope that the member countries will increasingly strengthen its prominence and role as a consensus-getter on these subjects.

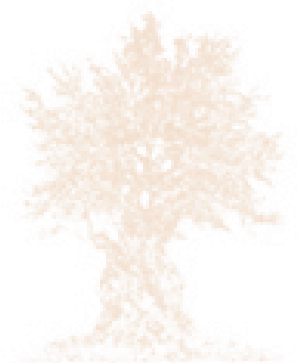
Through its initiative, Malta has been a staunch supporter and driver of this consensus-building, including its convening of Heads of State at a 5+5 Dialogue meeting for the first time since 2003, mere days after the successful outcome of the CIHEAM Ministerial. As a result of that political impetus, a Ministerial Meeting of the 5+5 Dialogue on Agriculture was also held in Algiers on 27th November 2013. This bodes well for progressing the dialogue for the countries of the Western Mediterranean Basin, and Algeria will also follow-up on and continue the work commenced by Malta at a CIHEAM Ministerial meeting in February 2014, also continuing on the topic of Food Security which 10 Ministers and all delegations agreed conclusions on in Malta in 2012.

The challenge for CIHEAM countries will be to continue building through consensus on these foundations, giving tangible outcomes to their deliberations and expanding the CIHEAM's role as a political forum which the EU can turn to as a credible partner. By re-invigorating and injecting new energy in this one of its three traditional missions, the CIHEAM may well flourish into a strong and effective voice for its member countries in the debates which will continue to shape the CAP over the coming years and in the next decades.

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The European CAP Reform: an Italian point of view

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CAP reform: the sensitive issues for Italy

The Italian agricultural system, like in other Mediterranean areas of Europe, is characterized by some distinguishing characteristics: a high labour intensity, the spread of tree crops, a smaller farm size than the EU average and a large number of products included in the EU quality schemes. These characteristics are very different from those of the northern and central/eastern European agricultures. In more general terms, the differences within the EU agricultural sector have been one of the topics of the debate opened after the Commission Communication on the future of the European Agricultural Policy in April 2010.

The current land area of the European Union (EU28) is classified as 91% rural and is managed mainly by farms. The contribution made by the management of this large portion of land is fundamental to ensure the balanced growth of the European society and economy. But at the same time we have to recognize the profound diversity that characterizes the different European agricultures. These differences have grown up hand in hand with the EU enlargement process and it is impossible to reconcile different structural and production systems with the idea of a unique European farm business prototype.

In this context the need to redistribute resources between member states and agricultural sectors had to find a trade-off to satisfy the needs of these differences in order to avoid dramatic impacts on some major agricultural systems in Europe. The pursuit of this trade-off was one of the most sensitive ground works for the EU policymakers (Adinolfi et al., 2010). This was also one of the major concerns for the Italian agriculture, in the light of the choice made after the 2003 Reform to maintain allocations of direct payments linked to the historic references.

Regarding the "market management" mechanisms, included in the Single Common Market Organisation (CMO) rules, many expectations of European farmers focused on the possibility of extending the mechanisms approved with the 2012 "Milk Package" which is incorporated into the new single CMO, in order to improve farmers' negotiating position in the food chain. Specific attention was devoted from Italy to the system of wine planting rights, in order to modify the decision to end the system at the end of 2015.

On the topic of rural development, expectations of a poorly managed debate have been confirmed. One important policy change, however, should be emphasized: the introduction of the new regulation measures dedicated to the management of business risk, including income risk.

The new CAP system for Direct Payments

The European Union has defined both resources and guidelines of its action for the next seven years (2014–2020) by adopting the new Multiannual Financial Framework (MFF). In this context, the Common Agriculture Policy (CAP) has been reformed, introducing important changes especially with regard to the direct payments system (DPS). The last major reform of the DPS took place in 2003, with the so called "Mid-term Review". At that time DPS was not only finally fully decoupled from production but it was also associated with the provision of public goods (Buckwell, 2009), such as animal welfare and environmental protection, marking the definitive end of the "productivist" vision of the EU public intervention in agriculture (Garzon, 2006).

With the political agreement reached last June in Brussels, the DPS has been completely reshaped. In terms of budget allocation the system moves towards a fairer distribution of direct payments support: resources allocation between member states (MS) move away from historical references, promoting the EU convergence of direct support on the base of the eligible agricultural surface. The process of external convergence combined with the overall cut of the CAP budget produce a reduction of more than 11% of the Italian envelope devoted to the DPS. Furthermore, internal convergence is also promoted. In this regard it is important to stress how the outcomes of the political agreement are significantly different from the initial Commission proposal, giving many opportunities to MS to mitigate the impact of the new system. These changes are relevant to most of the Mediterranean agricultural systems, in particular for those MS (Italy, Spain, Greece) that still maintain allocations of direct payments based on historic references.

The system proposed by the Commission, leading to a homogeneous per-hectare premium (flat-rate) for all farmers, would entail a relevant transfer of resources between sectors and areas. This would have particularly penalized the most representative elements of the Mediterranean agriculture in Italy, including olive growing, durum wheat and citrus producers. The new rules allow MS to choose from different options: in addition to adopting, a national/regional flat rate by 2019, they can opt for alternative convergence models listed in the regulation and at least they can limit any "losses" in farm payments to 30%.

At the same time the architecture of the DPS is being changed. In particular there is the introduction of a mandatory Greening Payment, which accounts for 30% of national envelope, linked to the provision of certain environmentally sustainable farming practices. In this regard the agreement on the inclusion of the tree crops in the notion of "Ecological Focus Area" (EFA), allowed Italy, like other countries of southern Europe, to preserve important shares of tree surfaces. Also in this case there has been a remarkable change to the initial proposal from the Commission that would have imposed the obligation to set aside even tree crops.

Resources that are not involved in the basic and greening component of the new DPS can be used with some flexibility by the MS. From the national point of view, the "Young Farmers" payment and the "Small Farmer" scheme are particularly interesting. The first payment aims at promoting the entry of young people in agriculture and strengthening the role of young farmers already active. The second aims at simplifying administrative procedures related to direct payments that could potentially involve a large part of the Italian farms population.

In order to disburse the "Young Farmers" payment, the "basic payment" should be topped up by an additional 25% for the first 5 years of installation of new entrant "young farmers" (those under 40). This shall be funded by up to 2% of the national envelope and will be compulsory for all MS. According to data provided by the Italian Ministry of Agriculture, this measure could potentially involve more than 80.000 Italian farmers (5% of the total) and more than 1.000.000 hectares (about 8% of the total agricultural area in Italy). The "Small Farm" scheme could represent an enormous simplification for the farmers concerned and for national administrations.

This is optional for MS. Any farmer claiming support may decide to participate in the "Small Farmers" scheme and thereby receive an annual payment fixed by the member state ranging from 500 € to 1.250 €. In terms of commitments, participants will face less stringent cross-compliance requirements, and be exempt from greening provisions. The total amount devoted to the Scheme may not exceed 10% of the national envelope. If we assume that all the farms with less than 2 hectares could be included in the Scheme, we are talking in the case of Italy of about 1 million farmers (more than 50% of the total).

What's new in the single CMO for Italy

The reformed single CMO is the result of the work done by the Commission, Parliament and Council over the last two years. The most important changes for the dairy sector have been anticipated in the "milk package", which has become a reference for all other agricultural sectors. For the wine sector, in which Italy is the leading world producer, the recommendation provided by the specific "High Level Group" were largely shared and supported by all Mediterranean MS. More in general the need for more effective tools for managing market crises and the willingness to provide farmers with tools to strengthen their bargaining power, were the guidelines on which the debate on the single CMO has developed.

Regarding wine production the outcomes of the political agreement respect the decision to end the system of wine planting rights, introducing a system of authorizations for new wine planting from 2016 (with growth limited to 1% per year) in order to better manage the transition towards the complete liberalization of the rights.

The decision to extend some rules of the "milk package" to other sectors (e.g. by extending the rules on supply planning to PDO processed meat, involving some of the most relevant Italian food quality systems) was very important to rebalance bargaining power along the Italian food supply chain. Furthermore, the possibility for farmers to collectively negotiate contracts for the supply of olive oil, beef, cereals and certain other arable crops is an opportunity to put farmers on a stronger footing within the supply, rebalance bargaining power and stimulate mutually beneficial relationships between all parties across the supply chain (De Castro et al., 2011).

Managing Risk through the Rural Development Program
The proposal for a regulation on rural development (RD) was, perhaps, the least debated one. There are several changes, all in line with expectations. However, two important innovations deserve to be emphasized. The first one is the strengthening of the coordination mechanism with other policies through an EU-level Common Strategic Framework, and through Partnership Agreements at the national level covering all support from European Structural and Investment (ESI) funds. This innovation could be very relevant, especially in some areas of southern Italy, in order to promote a more integrated vision of regional development. The second innovation introduced in the RD regulation is the so-called "risk management toolkit", and in particular the Income Stabilization Tool (IST), aimed at supporting risk management for the incomes of agricultural enterprises through mutual instruments.

The IST could be a relevant option for Italy where the insurance market has been growing in the last decade. An internal work carried out by the Italian Agro-Food Market Service Institute estimates that a target of about 100.000 farms, representing 15-20% of the national gross marketable production, could be involved in building a national mutual fund to cover farmers by income risk.

Conclusions

The general comment on the new DPS configuration is that the outcome of the political negotiations has resulted in substantial changes to the proposals of the Commission. These changes allowed some important requests from Mediterranean countries to be received, rebalancing the view of the Commission that at the beginning of the process appeared biased in favour of the characteristics of northern European agricultures.

The final result overcomes, at least partially, some of the major concerns related to the reform of the Italian agriculture. This was achieved without prejudice to the coherence of a process of ongoing reforms for over than twenty years. The new CAP direct payments system is greener, it is more equitable in terms of distribution of resources and it is more targeted. In addition it gives some space of flexibility to the MS in order to take into account the differences that characterize both agriculture and the rural areas of Europe.

At the same time, with the gradual phasing out of guarantees provided by the CAP to European farmers in terms of the stabilization of markets, the issue of risk management tools has gradually acquired an ever-higher profile that has resulted in a series of innovations. Some of these concern tools are available to farmers in order to stimulate a European fairly supply chain. Others relate to prevent and manage market crises.

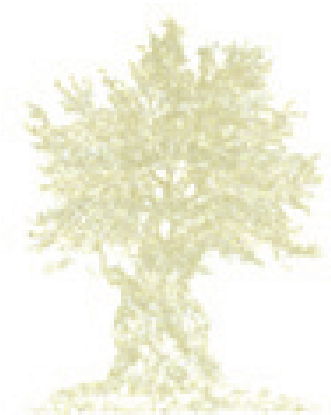
The overall result of this reform can be considered satisfactory from the point of view of Italy. Not only many risks that existed on the eve of the reform have been avoided, but some introduced innovations offer to the Italian farmers several opportunities to cope with risk and improve their organizational models.

These are general considerations, but the impact of the reform will differ from sector to sector. Many products characteristic of the Mediterranean area, such as oil, citrus and durum wheat, will suffer cuts in direct payments. Other sectors, equally important in terms territorial and economic values, such as livestock, will face stronger reductions. So, we're talking about a scenario that in any case will be more difficult than in the past for the Italian farmers, as well as in the rest of Europe.

Maybe in the Italian case some additional concern arises. Italian agriculture is one of the most labor intensive and a possible contraction in the sector would be dramatic for the economic future of many rural areas. Italian agro-food sector has the major number of quality products recognized in Europe and accounts for over 10% of total exports of European food. In addition we are talking about an asset that is of fundamental importance from the environmental point of view, given the high hydro-geological risk in the country.

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La réforme de la PAC annonce-t-elle un nouveau souffle pour l'agriculture méditerranéenne française ?

Pauline Lecole

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Avec l'accord politique trouvé à Bruxelles le 26 juin 2013 (CE, 2013), le cadre européen d'une PAC réformée et se voulant « *plus juste, plus équitable, plus verte et transparente* » (CE, 2010), entrera en vigueur dans son intégralité en 2015. Il reste à négocier un budget définitif et les modalités d'application que chaque Etat membre adoptera. Ainsi, la déclinaison française de la réforme n'est pas encore complètement fixée et dépend des priorités qui seront établies par le gouvernement et des rapports de force avec les différentes parties prenantes à l'échelle nationale.

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L'enjeu est particulièrement important pour les régions méditerranéennes françaises qui n'ont jusqu'à présent que peu bénéficié des fonds européens du premier pilier de la PAC. Cet article fournit une analyse qualitative des conséquences que pourrait avoir la réforme de la PAC sur l'agriculture dans les régions Languedoc-Roussillon (LR), Provence-Alpes-Côte d'Azur (PACA) et Corse.

Spécificités agricoles et enjeux communs aux régions LR, PACA et Corse

Soumises à un climat contrasté avec des hivers doux et humides et des étés chauds et secs, tributaires d'un relief souvent accidenté avec de larges zones de montagne et de piémont, les régions LR, PACA et Corse sont des territoires fragiles classés en quasi-totalité en zone défavorisée.

Sophie Thoyer

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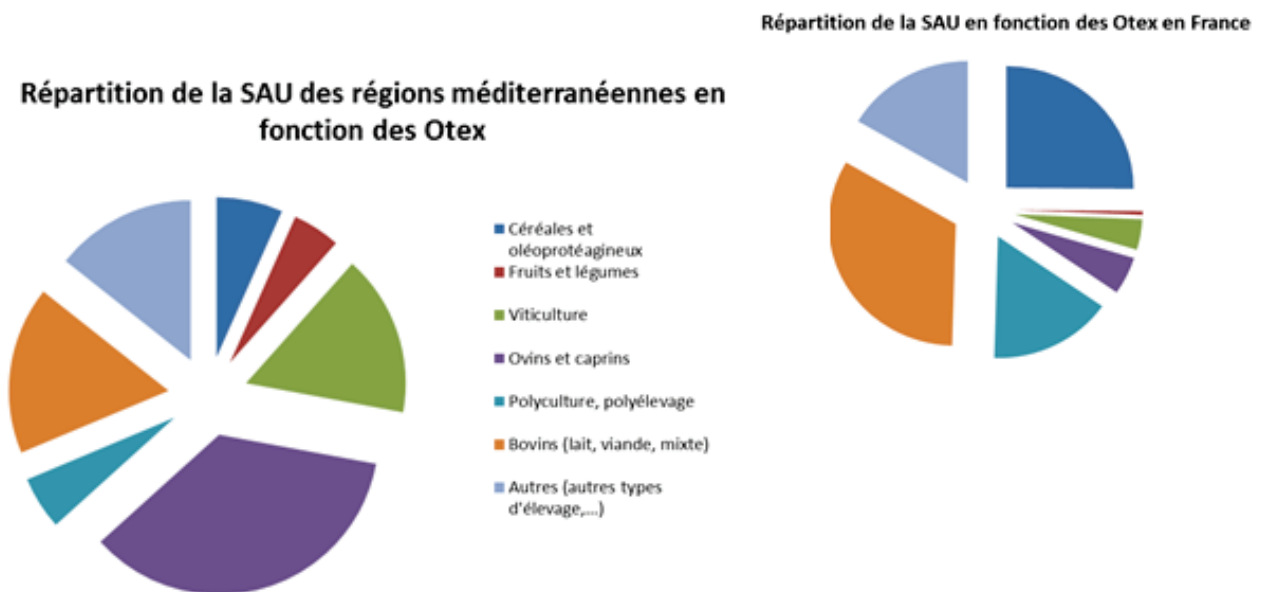
La production agricole est adaptée à ce contexte régional (Figure 1) : la part dédiée aux grandes cultures y est relativement faible. On trouve des céréales et des oléo-protéagineux sur environ 10% de la surface agricole utile (SAU), situés presque exclusivement en zone de plaine et principalement spécialisées en blé dur (environ 57% de la production en céréales et oléoprotéagineux en LR, 47% en PACA) et en riz sur le territoire de Camargue. Une part importante de la SAU est occupée par les vignes, les vergers et l'élevage extensif. Les deux tiers des exploitations agricoles du LR sont viticoles et représentent 30% du vignoble français.

De son côté, PACA est la première région française en termes de surface plantée en arbres fruitiers. 27% de la SAU française destinée à l'élevage ovin et caprin sont situés dans les régions méditerranéennes. Ce type d'élevage, adapté aux conditions pédoclimatiques méditerranéennes, permet d'exploiter des territoires marqués par la sécheresse estivale, souvent difficiles à mécaniser, et de faible productivité fourragère. Il participe à l'entretien du territoire et la réduction des risques tels que les incendies.

Les exploitations agricoles des régions méditerranéennes bénéficient aussi de bonnes conditions pour la diversification de leurs activités et la vente en circuit court, grâce à un tourisme très développé et à la proximité des centres urbains en zone littorale.

Figure 1

Répartition de la SAU en fonction de l'orientation technico-économique (OTEX) des exploitations agricoles



Source : Agreste, 2010

Les exploitations agricoles des régions méditerranéennes sont de plus petite taille qu'au niveau national, à l'exception de la Corse, et ont des revenus agricoles inférieurs à la moyenne nationale (Tableau 1). Les régions méditerranéennes n'échappent pas à la tendance générale de diminution du nombre d'exploitations agricoles. Ce sont principalement les surfaces en vigne qui ont été touchées de plein fouet par la crise des prix mondiaux du vin (en particulier en 2008 et 2009), tandis que le secteur des fruits et légumes souffre de la concurrence des productions espagnoles, marocaines et italiennes. La déprise agricole en zone de montagne est moins marquée mais les revenus des éleveurs restent faibles et la pérennité de l'activité menacée.

La structure des soutiens de la PAC aux exploitations agricoles méditerranéennes est très différente de la structure observée à l'échelle nationale (Tableau 1). Les aides directes du premier pilier (distribuées sous forme de Droits à Paiement Unique, DPU) sont 50% inférieures à la moyenne française. Cela s'explique par le fait que des systèmes de production comme la vigne, les fruits ou l'élevage extensif étaient historiquement peu aidés. En revanche, les aides spécifiques couplées aux productions méditerranéennes (blé dur, riz, élevage caprin et ovin) restent importantes. Les financements du second pilier, destinés au développement rural, sont quant à eux supérieurs à la moyenne nationale. Ils incluent en particulier les aides aux zones défavorisées, la prime herbagère agro-environnementale (PHAE) pour les zones de pâturage mais aussi des aides à la diversification en milieu rural, à la modernisation des entreprises agro-alimentaires et à la valorisation des produits locaux.

Tableau 1
Caractéristiques des aides aux exploitations des régions méditerranéennes (2010)

	Languedoc-Roussillon	Provence-Alpes- Côte d'Azur	Corse	France
Nombre d'exploitations	30 700	22 000	2 800	490 000
Taille moyenne des exploitations (ha)	29ha	28ha	60ha	53ha
Résultat courant avant impôt moyen par actif non salarié	21 600€	27 800€	28 700€	35 000€
Montant moyen d'aide du premier pilier total	12 506€	13 723€	11 331€	24 009€
Montant moyen d'aide du second pilier	13 852€	12 842€	20 000€*	9 653€
Montant moyen d'ICHN <i>Nombre de bénéficiaires</i>	9 580€ 3 996	10 770 € 34 108	6 238€ * 1 686	6 364 € 83 027
Montant moyen des aides couplées <i>% des bénéficiaires du premier pilier</i>	2 348€ 51,3%	4 252€ 39,2%	8 683€ 0,8%	2 296€ 1,3%

Sources : Disar 2010 (Ministère français de l'agriculture)

* = Données issues de l'évaluation in-itinere du Programme de Développement rural Corse

La réforme de la PAC et ses effets potentiels sur les régions LR, Paca, Corse

La réforme de la PAC prévoit de faire évoluer les aides directes (dites aides du premier pilier) vers plus d'équité entre les exploitations et les régions, et vers plus de légitimité environnementale. Concrètement, cela signifie que les agriculteurs européens vont passer progressivement d'un régime d'aides fondé sur des références historiques (les DPU) vers un système de paiements directs uniformes à l'hectare, appelés droits à paiements de base (DPB).

Le verdissement prévoit que le versement de ces paiements soit associé à certaines pratiques respectueuses de l'environnement comme la diversification des cultures, ainsi que le maintien des prairies permanentes et de surfaces d'intérêt écologique sur l'exploitation. La réforme du deuxième pilier de la PAC sera moins radicale, et concernera avant tout le développement de mécanismes collectifs de gestion des risques et le renforcement des aides dans les zones difficiles.

Les soutiens du premier pilier

Une des dispositions phares de la réforme est donc la mise en place des DPB, accordés à tous les hectares de SAU et qui, à terme, devraient converger vers un montant par hectare unique à l'échelle de régions de même potentiel agronomique. Au sein d'une région, il était ainsi prévu, au lancement des négociations sur la réforme de la PAC, que les écarts de paiements de base à l'hectare soient progressivement éliminés d'ici 2019.

La négociation européenne a largement dilué cet objectif initial puisque l'accord de juin 2013 stipule que le PDB à l'hectare le plus bas versé dans une région ne doit pas être inférieur à 60% de la moyenne nationale. Par ailleurs, il a été introduit, sur suggestion française, la possibilité de mettre en place un système dit « de paiement redistributif », qui permet de surprimer les premiers hectares afin de favoriser les petites exploitations. La France a choisi d'appliquer cette surprime aux 52 premiers hectares de chaque exploitation.

Ce projet de redistribution des aides aurait pu induire un véritable bouleversement des équilibres dans les régions méditerranéennes. En effet, les zones de productions viticoles traditionnellement peu ou pas du tout aidées via le système des DPU, auraient eu accès à un soutien direct proportionnel aux surfaces plantées. Mais la France a choisi d'exploiter les marges de manœuvre qui lui sont accordées par l'Europe. Ainsi, l'accord établi avec les syndicats agricoles français a été de garder les surfaces viticoles en dehors du dispositif des DPB, en contrepartie du maintien des financements de l'Organisation Commune de Marché (OCM) Vin. Ces financements, aussi inscrits dans le premier pilier de la PAC, sont presque exclusivement des aides aux projets d'investissement et de modernisation des groupements de producteurs. En aucun cas, ces aides ne jouent le rôle de soutien direct au revenu assuré par les DPB. L'impact de la réforme des aides directes sur les viticulteurs sera donc insignifiant. Pour les surfaces plantées en verger, il est possible qu'un compromis soit à trouver sur l'attribution ou non de DPB.

Aujourd'hui, certains syndicats s'inquiètent déjà de cette décision qui, en les tenant à l'écart du dispositif DPB distribuant 75% des aides communautaires, risque de les marginaliser dans les négociations budgétaires des futures programmations (après 2020), voire dans la refonte de l'OCM à partir de 2015.

Pour les exploitations en grandes cultures et pour l'élevage extensif, le tableau est plus optimiste. Avec une valeur moyenne de DPU qui n'est que de 130€/ha en LR, 125€ en PACA et 119€ en Corse (données Disar), elles devraient profiter du processus de convergence des DPB, ainsi que de la majoration des premiers hectares. Elles vont aussi bénéficier de la volonté affirmée de la France de maintenir les aides couplées au niveau maximum autorisé : ces aides seront destinées en priorité à des soutiens spécifiques aux systèmes d'élevage privilégiant l'autonomie fourragère (prime à la vache allaitante, aides ovines et caprines). En revanche, l'incertitude demeure encore sur le sort réservé au soutien à la culture du blé dur. Les producteurs du sud de la France militent donc activement pour une aide spécifique au blé dur, à l'image des aides à l'élevage de montagne, qui compenserait les petits rendements et maintiendrait cette culture traditionnelle, importante pour l'aménagement du territoire (car il est difficile, sans irrigation, d'y substituer d'autres grandes cultures), et source d'approvisionnement des pays du sud de la Méditerranée, en particulier de l'Algérie.

Les conditions de verdissement devraient avoir assez peu d'influence dans les régions méditerranéennes. Cependant, des inquiétudes demeurent, en particulier pour les exploitations en monoculture de blé dur de l'ouest de la région PACA, car la condition de diversification des cultures impose que la culture principale ne dépasse pas 75% de la sole cultivée (CGDD, 2012). De plus, l'obligation de maintien des prairies permanentes pourrait se révéler être une contrainte pour les éleveurs de plaine qui ne pourront pas agrandir leur surface en terres arables et seront donc limités dans leur capacité à gérer leur autonomie en grain pour l'alimentation du bétail.

Un renforcement des aides aux zones défavorisées

Le dispositif d'aide aux zones agricoles défavorisées existe en Europe depuis 1975. Il devrait se trouver renforcé par la réforme principalement via une revalorisation de l'indemnité compensatrice des handicaps naturels (ICHN), inscrite dans le second pilier de la PAC.

La France a ainsi choisi de faire passer le montant plafond de l'ICHN à 450€/ha en montagne et environ 250€/ha pour les zones défavorisées et de piémont et d'augmenter les surfaces éligibles par exploitation, ce qui lui permet par la même occasion d'y inclure l'ancienne prime herbagère agro-environnementale (PHAE), que Bruxelles voulait voir disparaître. Par ailleurs, le ministère de l'agriculture réfléchit à la mise en place d'une nouvelle mesure agro-environnementale, intitulée « systèmes herbagers et pastoraux », et qui pourrait elle aussi, compenser en partie la suppression de la PHAE en encourageant le maintien de systèmes d'élevage extensifs sur des prairies permanentes, des parcours et des estives. Comme 8.6% des bénéficiaires des ICHN de l'hexagone se trouvent en PACA et en LR, et que les éleveurs corses bénéficient tous de l'ICHN, il est clair que ces dispositions vont améliorer le sort des éleveurs de ces régions.

De plus, les instances européennes discutent déjà depuis plusieurs années d'une nouvelle délimitation des zones soumises à des contraintes naturelles fondée sur la base de critères biophysiques (dont la sécheresse et la température). Dans ce contexte, et en invoquant les difficultés croissantes que devrait engendrer le réchauffement climatique, les régions méditerranéennes françaises espèrent bien faire valoir le critère sécheresse qui permettrait ainsi d'élargir le zonage des terres agricoles soumises à des contraintes spécifiques aux zones côtières incluant ainsi des cultures viticoles et fruitières. Ces productions pourront aussi bénéficier du renforcement des outils de gestion des risques prévu dans la réforme et qui permettra de mieux prendre en charge les risques liés aux aléas climatiques et aux attaques parasitaires. Des systèmes de mutualisation permettront aussi de proposer des assurances-revenu sous forme de mutuelles, qui, si elles sont ouvertes aux viticulteurs et arboriculteurs, pourraient les aider à affronter les crises sporadiques auxquelles ils font face.

Conclusion

La réforme de la PAC pour la programmation 2014-2020 devrait réorienter une partie des soutiens vers les petites exploitations et, pour le cas de la France, vers l'élevage en zone difficile. Les zones de montagne et de piémont des régions méditerranéennes sortiront gagnantes à terme. En revanche, l'avenir reste plus incertain pour la vigne et les cultures fruitières. Il est à signaler, enfin, que pour la programmation 2014-2020, ce sont désormais les Régions qui seront chargées des Programmes de Développement Rural Régional (PDRR) définissant les priorités et financements pour le 2ème pilier. Les régions PACA et LR ont ainsi l'occasion de mieux déployer des stratégies adaptées pour gérer leurs contraintes et valoriser les atouts des spécificités méditerranéennes.

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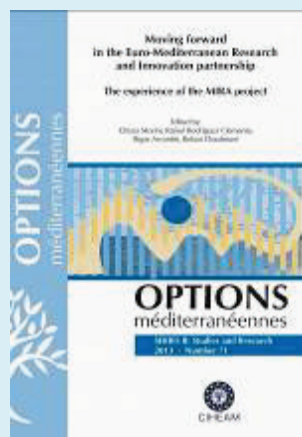
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www.supagro.fr/capeye

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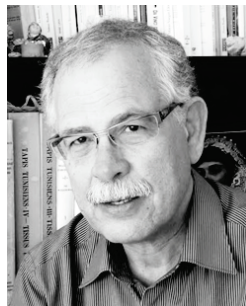
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L'Europe en Tunisie: investir l'agriculture et le rural pour une meilleure coopération ?

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La Tunisie devrait importer au cours de l'année 2013 près de 1,6 millions de tonnes de céréales pour couvrir ses besoins, ceci suite à une récolte médiocre, inférieure de 30 % par rapport à celle de la saison précédente et dans un contexte où le marché international des matières premières agricoles reste assez tendu. Elle aura d'autant plus de difficultés à payer la facture de ces importations que la récolte des olives s'annonce elle aussi médiocre avec une baisse de plus de 60 % par rapport à la saison précédente et que les exportations seront ainsi limitées, malgré des stocks assez consistants.

Cette situation montre, s'il en était besoin, la double fragilité de cette agriculture : celle face aux aléas climatiques d'une part et celle de sa dépendance à un marché international de plus en plus volatil d'autre part. Elle montre enfin les limites d'un modèle de développement extraverti et la difficulté d'assurer la sécurité alimentaire par le seul recours au commerce international.

Par ailleurs, l'Union européenne (UE), au cours des derniers mois, alors qu'elle finalisait les contours financiers de sa programmation budgétaire 2014-2020 et procédait à la réforme de sa politique agricole commune (PAC), s'est retrouvée prise au dépourvu par l'ampleur des changements sociopolitiques qui frappait plusieurs pays arabes de son voisinage depuis l'hiver 2010-2011.

Elle s'est montrée soucieuse d'accompagner au mieux les transitions démocratiques et a régulièrement invité ces pays du Sud de la Méditerranée à réintroduire plus fortement des politiques agricoles et rurales dans leurs stratégies de développement et à définir simultanément des modèles de croissance plus inclusifs.

A première vue, on aurait pu croire donc qu'il allait exister une certaine convergence entre les objectifs de la Tunisie qui cherche à réduire sa dépendance alimentaire et à développer les régions intérieures à dominante rurale et ceux de l'UE qui, ayant compris le risque que présente l'instabilité à sa frontière méridionale, aiderait les pays en question à définir puis à asseoir une politique agricole et de développement rural plus centrée sur les attentes des ruraux.

Toutefois, malgré une Politique européenne de voisinage (PEV) renouvelée, et l'émergence de l'initiative ENPARD dont l'objectif est de permettre aux pays du voisinage de définir des politiques agricoles et rurales plus inclusives et en harmonie avec leurs capacités productives et leurs besoins, force est de constater que, du côté tunisien, on reste loin d'avoir une offre claire et un cadre politique qui incite à plus d'engagement de la part de l'Union.

Les origines rurales et agricoles de la révolution tunisienne

La révolte en Tunisie est née dans les régions à dominante rurale dont l'économie est principalement caractérisée par un secteur agricole important. Le point de départ en a été l'immolation de Mohamed Bouazizi à Sidi Bouzid, chef-lieu d'une région agricole dont le système agraire a connu une profonde mutation en passant, en l'espace de cinq décennies, d'un système pastoral à un système agricole basé sur l'arboriculture en sec et les cultures irriguées. La révolte localisée s'est ensuite propagée vers les régions de l'intérieur du pays (le chef-lieu du gouvernorat de Kasserine et la délégation de Thala), avant de toucher le reste du pays, en se déployant notamment vers les régions côtières de Sfax puis vers les faubourgs de Tunis et enfin le centre névralgique de la capitale.

La révolte du monde rural est le résultat de la dégradation des conditions de vie et de production des agriculteurs, et notamment ceux qui appartiennent à la catégorie de l'agriculture familiale, dont le développement dans les années 1970-1990 a été encouragé à la fois par les politiques agricole et rurales mais surtout par la croissance d'une demande interne dans le cadre d'un marché domestique protégé. La crise de l'agriculture et du monde rural, à la veille de la révolution de janvier 2011, est la combinaison de choix multiples en termes de politique de développement économique et social, où la place de l'agriculture dans celles-ci ne fut pas toujours suffisante.

En effet, la Tunisie a opté, dès la fin des années 1980, avec le programme d'ajustement structurel, et surtout dès le milieu des années 1990 avec l'adhésion à l'OMC et la signature de l'accord d'association avec l'UE, pour une libéralisation de son économie et une ouverture de son marché. Dans cette optique, un schéma d'aménagement du territoire qui concentre l'investissement dans les régions du littoral (dans le but de favoriser l'ancrage de la Tunisie à mondialisation) a été privilégié, en arguant que les fruits de la croissance pourraient, par effets d'entraînement, bénéficier à tout le pays (Daoud, 2011). Par ailleurs, cette orientation a été renforcée par des choix en termes de politiques agricoles qui ont globalement privilégié les consommateurs au détriment des producteurs, renforçant ainsi le biais urbain dont parlait déjà Hafedh Sethom au début des années 1990 (Sethom, 1992).

Ces choix ont conduit à la détérioration progressive du pouvoir d'achat des agriculteurs. Au terme de cette période, cela a provoqué la paupérisation des populations rurales en général et des populations agricoles en particulier, notamment dans les régions intérieures du pays (INS, 2012). Ce processus de déclassement de l'agriculture familiale s'est doublé par un processus de différenciation/exclusion, qui s'est traduit par le développement d'une agriculture d'entreprise à la fois sur les terres domaniales et à travers un processus d'appropriation des terres privées et des ressources hydrauliques du domaine public (Jouili et al, 2013). En outre, cela a accentué les pressions sur les ressources naturelles, dont la mobilisation aura été à la base du développement agricole et dont l'utilisation atteint les limites de la résilience des systèmes.

Quelles réponses à ces attentes ?

La révolution de janvier 2011 pouvait donc constituer une opportunité pour revoir ces politiques et apporter des réponses aux attentes des ruraux et de tous les laissés pour compte de la croissance enregistrée au cours des années précédentes. On pouvait s'attendre donc à la remise en cause de la part des gouvernements successifs en Tunisie et notamment de celui, même s'il est provisoire, issu des urnes suite aux élections du 23 octobre 2011, à une réponse radicale prenant à bras le corps la question rurale et celle liée des disparités régionales.

Comme il était légitime, parallèlement, de s'attendre, suite à un élan de générosité et surtout d'intérêt bien compris de la part de l'UE, à la mise en place d'un plan ambitieux et d'envergure pour les pays de la rive Sud. Or si la réponse de l'UE, même si elle a été peu adaptée au départ, a fini par se donner un cadre de partenariat clair à travers l'initiative ENPARD (*Programme européen de voisinage pour l'agriculture et le développement rural*). La Tunisie tarde pourtant depuis à définir une offre claire pour la coopération avec l'Europe et n'est toujours pas dotée d'une politique agricole qui servirait de cadre à cette coopération et qui encouragerait l'UE à plus d'engagement.

Une offre basée sur le savoir-faire en développement territorial

La réponse de l'Europe au « printemps arabe » a été dans un premier temps une réaction dans l'urgence avec le programme SPRING. Avec un titre évocateur, ce programme, doté d'un fonds de 350 millions d'euros pour la période 2011-2012 se voulait une réponse à la crise que traversait ces pays. Le programme en question s'articule autour de deux grands axes: le soutien à la transition démocratique (i) et l'engagement pour un développement économique basé sur une croissance durable et inclusive (ii). Toutefois malgré sa dotation de départ, il n'a eu que peu d'effets sur les nouvelles politiques de développement, notamment dans les pays en transition démocratique, vue l'ampleur des besoins et des attentes.

C'est alors dans le domaine agricole et rural que l'UE va chercher à offrir son expertise pour les pays en question, consciente qu'elle est de l'origine de la crise et de l'importance d'apporter des réponses aux populations rurales des pays de la région en mettant en place, sur le moyen terme, une réflexion qui devait aider ces pays à réformer leurs politiques et à préparer une offre de partenariat avec l'UE pour la période 2014-2020. Comme cela a été dit plus haut, c'est à travers l'initiative ENPARD, lancée en janvier 2012, que ce processus de co-construction va être mis en place.

Pour Stefan Füle, Commissaire européen pour l'élargissement et la politique de voisinage, ENPARD est une nouvelle initiative politique qui fait partie de l'engagement de l'UE en faveur de la croissance inclusive et de la stabilité dans son voisinage, qui reconnaît l'importance potentielle de l'agriculture, de la sécurité alimentaire, de la production durable et de l'emploi rural. Ainsi pour la Commission, il s'agit, à travers cette initiative, de proposer aux pays du Sud de partager son expérience et le partenariat européen en matière de développement rural pour mettre en valeur de façon durable le potentiel agricole, comme l'a souvent indiqué Dacian Cioloș, Commissaire à l'européen à l'agriculture et au développement rural.

Après une première phase de diagnostic, de concertation et d'échange en 2012 entre les pays concernés (Algérie, Egypte, Jordanie, Liban, Maroc et Tunisie), cette initiative est actuellement à sa deuxième phase. Celle-ci consiste à mettre en place des projets pilotes qui devraient servir de base à la réflexion et à la capitalisation pour définir les contours d'une nouvelle politique de développement agricole et rural et de l'offre de chaque pays à l'UE. Toutefois, quelques mois avant la mise en place de la nouvelle programmation de cette initiative et de la PAC réformée en Europe, aucune avancée n'est à noter du côté de la formulation d'une nouvelle politique agricole et de développement rural en Tunisie. Cette situation est à la fois le résultat de la nature même de l'initiative ENPARD et de son contenu, mais aussi de la situation propre à la Tunisie qui ne dispose toujours pas d'un cadre stratégique pour le secteur agricole et le développement rural.

L'initiative ENPARD se voulait, au départ, ouverte et sans volonté aucune d'imposer un contenu et une démarche unique, chaque pays devant définir ses attentes et la manière d'y répondre et de traduire le tout en une stratégie de politique agricole et de développement rural. C'est ainsi qu'une approche s'est progressivement imposée en Tunisie : celle du développement territorial à travers la « territorialisation » des filières. Dans un pays dont les ressources naturelles sont limitées et fragiles, la réponse à la problématique du manque de compétitivité des produits agricoles et de la marginalisation des espaces ruraux passe par la recherche d'une plus grande maîtrise des communautés locales sur leur territoire. Cette maîtrise devrait se traduire par l'émergence d'un projet collectif, inclusif et soutenable. Le développement territorial ainsi mis en place se donne comme objectif la création d'une compétitivité territoriale par la différenciation des produits. Il s'appuie sur la promotion de l'action collective au niveau des territoires et de la participation de tous les acteurs à la gouvernance des ressources patrimoniales d'un territoire. C'est cette approche que cherche à mettre en avant le programme ENPARD en Tunisie. Une telle approche peut en effet apporter des éléments de réponse à la situation du secteur agricole et des zones rurales. Toutefois, elle nécessite des conditions préalables qui, dans le contexte actuel, font encore défaut. Cette situation obère la réussite des projets de développement territorial.

En effet, cette approche territoriale peut buter sur des contraintes internes au pays. Ainsi, la décentralisation, qui reste un processus inachevé en Tunisie, ne permet pas à ce stade de favoriser la prise de décision au niveau du territoire (principe de subsidiarité). Par ailleurs, la nécessité, dans une telle approche stratégique, d'impliquer les acteurs privés, risque de se heurter à l'absence d'entrepreneuriat dans certaines zones, et, en particulier, dans les régions rurales de l'intérieur. En outre, même en cas de mise en place d'une filière territorialisée, il n'est pas dit que cela puisse forcément impulser un développement autoentretenu dans des régions ayant besoin d'un processus de développement plus volontariste et plus vigoureux.

Du point de vue de l'approche elle-même, le développement territorial se base essentiellement sur la différenciation des produits pour asseoir une compétitivité territoriale en place et lieu de la compétitivité prix. Or la mise en place de la différenciation des produits se heurte de manière générale aux coûts de transaction qui peuvent être plus élevés que le bénéfice tiré de la différenciation. Il y a aussi l'absence de barrières à l'entrée et le fait que la différenciation peut parfois profiter à des acteurs autres que ceux qui y ont contribué. Le risque que l'offre de produits de terroir ne rencontre pas de demande solvable capable de payer le prix de la qualité territoriale représente un autre type de problèmes à prendre en considération. Enfin, même quand cette demande existe, il est difficile d'assurer un partage équitable de la valeur ajoutée et d'en faire bénéficier le territoire en question. Si le concept est séduisant, son application à l'échelle tunisienne et sur le plan local de certaines régions rurales et agricoles du pays, n'est pas chose aisée.

Conclusion

L'initiative ENPARD, malgré des limites, constitue une véritable opportunité pour la Tunisie. Celle-ci aurait dû être davantage saisie en présentant une offre pour la prochaine période de programmation. Mais, pour cela, il aurait été nécessaire qu'un débat politique au niveau national puisse avoir lieu entre les différents acteurs concernés. Or, dans un contexte caractérisé par une transition démocratique qui traîne en longueur, il apparaît difficile de mettre en place ce type de dialogue, surtout en l'absence d'une vision politique claire et lisible. Il faut toutefois noter que la mise en place de l'initiative ENPARD dans sa première phase en 2012 fût l'occasion de mobiliser les différents acteurs du développement agricole et rural (et notamment ceux de la société civile et des organisations professionnelles) pour partager avec eux le diagnostic du secteur et susciter un débat sur les orientations stratégiques d'une agriculture plus durable et de zones rurales revitalisées.

Des lignes directrices ont émergé de ces débats. Elles ont mis en lumière les bonnes pratiques portées par les acteurs de la société civile, et notamment les ONG œuvrant dans le domaine du développement rural. Elles ont souligné la nécessité d'un nouveau modèle de développement agricole qui puisse enfin tenir compte de la rareté des ressources et de leur fragilité, contraintes amenées à s'accroître dans les années à venir avec le changement climatique. Elles ont insisté également sur l'importance d'améliorer la productivité des différents systèmes agricoles, que ce soit en sec ou en irrigué, en adoptant un modèle d'intensification écologiquement soutenable. Elles ont aussi exprimé un besoin de révision sur l'orientation de la production et le niveau d'insertion dans le marché international, en aspirant à une plus grande sécurité alimentaire pour préserver l'avenir et l'indépendance du pays.

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Réforme de la PAC européenne : enjeux alimentaires et géostratégiques pour l'Algérie

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La nouvelle PAC est souvent décrite comme « une réussite *a minima* ». Une réussite car elle a permis aux 28 pays de l'UE de se mettre d'accord sur des mécanismes plus justes et plus efficaces : davantage d'autonomie et de flexibilité dans l'application de certaines dispositions et mise en place du principe de convergence qui permet en partie de diminuer certains écarts entre grands et petits producteurs. Mais elle représente un accord *a minima* car elle se caractérise par deux « déceptions » majeures :

- le verdissement tant annoncé est pâle. Malgré quelques transferts supplémentaires du premier au second pilier et des mécanismes supplémentaires en termes de développement rural. Cette nouvelle version n'affiche pas pleinement le rôle central de la PAC comme outil de prise en charge au niveau européen des enjeux environnementaux et de développement durable.
- la seconde frustration concerne le focus européen, sans référence aucune à des possibilités d'élargissement au Sud. Cette PAC 2013 s'apparente davantage à une phase de stabilisation et de « digestion » des agricultures des nouveaux entrants de l'Est, qu'une réelle rupture dans la politique agricole de l'Union Européenne.

C'est dans le cadre de cette seconde question que s'inscrit le présent travail. Cette note vise à analyser les effets potentiels de la réforme de la PAC sur un des plus importants partenaires commerciaux et agricoles du Sud de la Méditerranée de l'UE : l'Algérie. En toile de fond de cette analyse, deux aspects des relations de l'UE avec ses voisins du Sud : le processus de libéralisation des échanges agricoles d'une part, et les enjeux de sécurité alimentaire tels que dictés par les politiques publiques agricoles locales d'autre part.

Éléments factuels et effets potentiels de la réforme de la PAC 2013

Malgré de nombreux programmes coûteux et ambitieux de mise à niveau, et certains résultats positifs observés ces dernières années en termes de rendements, l'agriculture algérienne se caractérise par une sous-compétitivité structurelle et des dysfonctionnements récurrents, relevant notamment de caractéristiques techniques et organisationnelles. Dans les faits, cela se traduit par une très forte dépendance alimentaire vis à vis de l'extérieur. A titre d'exemple, le pays importe près de la moitié de sa consommation en céréales et n'arrive toujours pas à assurer sa sécurité alimentaire pour de nombreux produits (lait, oléagineux, sucre, viandes, etc.).

En termes d'échanges internationaux, et contrairement à ses voisins maghrébins, l'Algérie occupe vis à vis de l'UE une position « atypique », de grand importateur net de produits agricoles et agroalimentaires. En 2011, l'Algérie a été le premier débouché en volume pour les céréaliers français, avec 34 millions de quintaux, soit près de 40% des exportations françaises (alors même que l'export constitue la moitié des débouchés du blé français) (Gatel, 2012). Selon les données Eurostat 2012, en dehors des hydrocarbures, l'Algérie n'a exporté vers l'UE que 73 millions d'euros (dattes, liège, quelques produits de la mer). En revanche, dans l'autre sens, l'Algérie a importé pour près de 3,26 milliards d'euros en produits agricoles et alimentaires européens. D'après les données OMC de 2010, les importations alimentaires représentent en moyenne le quart des importations totales, alors que les exportations agricoles n'ont été que de 328 millions de US\$ (dix fois moins que le Maroc, et cinq fois moins que la Tunisie).

Ces quelques éléments factuels permettent de recadrer la question. Alors que l'Algérie participe aux dispositifs d'intégration régionale euro-méditerranéens (Processus de Barcelone, Politique de voisinage, Union pour la Méditerranée, dialogue 5+5), la position du pays présente de nombreuses spécificités par rapport aux attentes vis à vis des réformes en cours de la PAC. Il est facile de comprendre pourquoi de nombreux pays (Groupe de Cairn, pays agro-exportateurs) appellent à la suppression totale des aides directes et celles à l'export, et attendent beaucoup de la PAC réformée: même si ce scénario ne semble pas envisageable dans l'immédiat, il signifierait s'il venait à se réaliser, la fin d'une compétitivité « artificielle » de nombreux producteurs européens sur les marchés internationaux (céréales, sucre, lait, etc.).

Contrairement aux voisins maghrébins, soucieux essentiellement de l'accès des produits agricoles aux marchés européens, les craintes algériennes sont davantage tournées sur la sécurisation des approvisionnements alimentaires, et demeurent contre intuitives pour un pays qui ambitionne de développer son agriculture : l'Algérie a presque intérêt à ce que les subventions à l'export, qui tassent les prix sur les marchés internationaux, soient maintenues le plus longtemps possible. Elle a aussi intérêt à ce que les aides à la production (directes ou transférées) soient les plus élevées possibles, même si elles sont englobées dans un pack « développement durable et rural ».

Enfin, elle a intérêt à ce que les rattrapages effectués (mais surtout des autres candidats –Turquie ou Ukraine par exemple) par les pays de l'Est se fassent avec l'aide financière et technique des pays européens « historiques » en vue d'une amélioration substantielle des rendements (notamment céréaliers), synonyme d'une meilleure disponibilité de l'offre sur le marché mondial. Ces différences d'enjeux ne sont pas sans effets sur l'unicité et l'homogénéité des visions géostratégiques des pays du Sud et de l'Est de la Méditerranée.

Souveraineté et de sécurité alimentaires : Les enjeux géostratégiques

Les arguments précédents relatifs à un maintien du *statu quo* de la PAC dans le traitement des questions d'intégration agricole euro-méditerranéenne peuvent expliquer certains enjeux à court terme. Néanmoins, ils ne rendent pas compte des défis à long terme ni pour les agricultures européennes, ni pour l'Algérie.

Les premiers se posent en termes de sécurisation des échanges extérieurs face à une concurrence commerciale de plus en plus forte de certains pays émergents (Cheriet, Rastoin, 2014). La présence commerciale du Brésil, de l'Argentine, du Canada, des Etats-Unis, de la Chine, de l'Inde ou encore de l'Australie, de la Turquie et de l'Ukraine en Méditerranée, semblent se renforcer depuis une décennie, remettant en cause les positions historiques des pays de l'UE sur de nombreux produits.

Les seconds sont traduits par des impératifs de sécurité alimentaire pour l'Algérie. Actuellement, et pour ne prendre que l'exemple des blés, 7 baguettes sur 10 sont couvertes par l'importation. Un quart des importations algériennes, soit 10 milliards US\$ concernent l'alimentation (Chehat, 2012). En termes de disponibilités alimentaires, les données de la FAO (moyenne de 2006-2010) permettent de comprendre l'intensité de la dépendance alimentaire algérienne vis-à-vis des importations: 69% pour les blés, 80% pour le lait, 95% pour les légumineuses et 89% pour les huiles (Bedrani, Cheriet 2014).

Cette facture alimentaire est fortement assumée par le budget de l'Etat algérien (pour les biens de première nécessité). Les prix soutenus par l'Europe sur le marché international (soutien aux agriculteurs) sont ensuite soutenus pour une grande part des biens de consommation par l'Algérie. Ce soutien grève fortement le budget de l'Etat et représente près de 3 milliards de US\$ par an, soit en moyenne 4% du PIB en subventions directes à la consommation alimentaire entre 2005-2012 (Bedrani, Cheriet, 2014). Il apparaît ainsi clairement que ce maintien d'un rapport figé en termes d'ouverture de la PAC européenne sur les pays du Sud de la Méditerranée (et en particulier pour l'Algérie) n'est bénéfique qu'à court terme, sans prise en compte des enjeux géostratégiques de la région. Une meilleure intégration de l'agriculture algérienne s'impose.

Elle passe d'abord par une mise à niveau importante des structures de production, pour répondre en premier lieu à la demande interne, avant d'envisager des exportations des excédents agricoles vers les voisins du Nord. Plusieurs programmes de développement agricoles et rural ont été initiés dans ce sens. Les budgets consacrés par l'Algérie, sont comparables à ceux octroyés dans le cadre de la PAC à certains pays européens. Ainsi, le programme en cours (PNRAR : programme national du renouveau agricole et rural) bénéficie d'une enveloppe budgétaire de 10 milliards US\$ sur 4 ans (2010-2014). Ce programme a introduit de nombreuses innovations institutionnelles (Bais, 2013) et vise un développement intégré de nombreuses filières dites prioritaires (céréales, lait, légumineuses, etc.).

Les premiers résultats sont plutôt satisfaisants en termes de production, mais se sont aussi heurtés à de nombreuses difficultés liées à la faible structuration des filières (déficience des usines de transformation, complexité organisationnelle des programmes régionaux, problèmes liés au statut des moyens de production et du régime foncier, insuffisance des plateformes logistiques, etc.).

Quoiqu'il en soit, ces efforts renseignent sur une volonté politique renouvelée des pouvoirs publics en faveur d'un « rattrapage » de l'agriculture algérienne. Les ambitions en termes de sécurité alimentaire sont clairement affichées. Leur atteinte passe d'abord par une modernisation en cours des secteurs agricole et rural. Elle passe ensuite par une plus grande intégration de l'économie agricole algérienne dans la région euro-méditerranéenne. Dans ce sens, les attentes en termes d'élargissement de la PAC au Sud de la Méditerranée existent. Elles répondent à des objectifs de sécurisation des approvisionnements alimentaires et s'inscrivent dans une approche globale de construction régionale euro-méditerranéenne. Néanmoins, elles ne constituent pas pour l'instant, ni d'un côté ni de l'autre, une condition nécessaire et suffisante en faveur de la construction agricole régionale.

Réforme de la PAC et perceptions des acteurs de terrain en Algérie

Afin de rendre compte des différentes perceptions des « acteurs » algériens de terrain, impliqués dans les secteurs agricoles et agroalimentaires, nous avons mené une série d'entretiens dans le cadre d'une recherche exploratoire qualitative (cf. encadré *infra* pour les précisions méthodologiques).

Il ressort d'abord que la réforme de la PAC est globalement méconnue et peu présente dans l'agenda des acteurs. Les enjeux algériens se situeraient davantage au niveau du développement national du secteur agricole d'une part, et des résultats des négociations des accords d'association avec l'UE pour améliorer les positions algériennes sur le marché domestique d'autre part. Ci-dessous la retranscription de quelques verbatim.

- « Je pense que la réforme de la PAC Européenne est un non évènement pour le secteur agricole, tant nous sommes déconnectés des marchés internationaux (sauf pour l'importation). Par contre, cela nous donne une idée sur les efforts de l'UE pour harmoniser des politiques pour 27 pays. Ils y arrivent même si cela est complexe, alors que nous, même seuls, nous n'arrivons pas à avoir un cadre de réforme clair, pertinent et stable »

- « Je vous avoue que c'est votre appel qui m'a permis d'avoir des informations sur cette réforme. Je ne m'y étais pas intéressé auparavant. Par contre, je suis avec beaucoup d'attention, les négociations sur l'accord d'association avec l'UE. Pour nous, cela est plus important comme outil de protection et de promotion de notre agriculture. Les européens s'organisent pour mieux soutenir leurs agriculteurs. Tant mieux pour eux, mais c'est à nous d'apporter les réponses adéquates pour favoriser nos produits sur notre propre marché ».

Les interrogations de nombreux acteurs se situent également sur le plan de l'impact de la PAC en termes de stabilité des prix internationaux et d'accès à l'export pour les produits algériens. Ensuite, cette nouvelle réforme de la PAC est perçue comme une réussite « institutionnelle » visant une meilleure intégration des pays de l'Est de l'Europe. Le clivage entre l'Est de l'Europe et le Sud de la Méditerranée est ainsi encore très ancré dans les perceptions des acteurs algériens.

Par ailleurs, la question du renforcement des aides « environnementales » semble secondaire mais traduit des craintes en termes d'accès futurs des produits agricoles algériens (marginaux pour l'instant) aux marchés européens dans le cadre des accords de libéralisation des échanges.

- « Le plus important concernant les échanges de l'Algérie, et pour être précis, concernant les importations agricoles, est que cette nouvelle PAC 2013 ne déstabilise pas les prix (des céréales en particulier) sur les marchés internationaux. Pour le reste, je suis convaincu que cette réforme est davantage destinée à mieux intégrer les agricultures des nouveaux pays européens, mais qu'elle nous concerne très peu »
- « La nouvelle PAC 2013 est minimaliste car elle ne répond pas à un certain espoir des pays du Sud de la voir élargie à certains pays du Maghreb. Pour l'Algérie, même si de nouvelles mesures sont prises dans le cadre de cette nouvelle réforme européenne pour renforcer les normes environnementales des produits agricole importés par l'Europe, cela aura très peu d'incidence sur nos agriculteurs, car nous n'avons que peu d'exportations. Probablement (et hélas !), nos voisins maghrébins ont plus de soucis à se faire de ce point de vue. »

Enfin, un chercheur universitaire en économie agricole nous a indiqué que cette nouvelle réforme traduisait aussi un retour de l'Europe vers un rééquilibrage en faveur de l'agriculture familiale et les exploitations de petite taille. Dans ce sens, cette réforme indiquerait pour l'Algérie l'exemple à suivre à long terme dans le cadre des réformes agricoles nationales. Un intérêt particulier devrait ainsi porter dans le cadre des futurs programmes aux petits agriculteurs et aux régions spécifiques (steppes, montagne, sud)

- « Dans le cas de la PAC 2013, qui est un nouvel acquis dans le domaine de la décentralisation et de la démocratisation pour les pays et agriculteurs européens, on sera probablement attiré par le volet qui accorde effectivement un intérêt particulier à la petite exploitation ou agriculture familiale »

Notes méthodologiques sur la conduite des entretiens

Les entretiens semi directifs ont été menés auprès d'une dizaine d'acteurs « locaux », impliqués dans certaines institutions ou des organisations des filières agricoles ou dans celles du commerce international de produits agricoles et agroalimentaires. Il s'agit d'institutionnels (cadre supérieur OAIC (office algériens interprofessionnel des céréales), représentant dans la chambre d'agriculture de la wilaya de Constantine), d'acteurs du secteur privé (cadre d'une entreprise d'importation de produits dérivés des céréales, d'un importateur de fruits et légumes, d'un dirigeant d'entreprise de transformation de tomates) ou public (cadre d'une entreprise publique ERIAD Sétif/céréales et dérivés, cadre de l'ONAB (office national des aliments de bétail), ainsi que de deux chercheurs universitaires- experts des questions agricoles et des politiques publiques en Algérie. Cette enquête a été menée pour les besoins du présent article, durant la période allant du 1^{er} septembre au 15 octobre 2013. Les entretiens téléphoniques ou par courrier électronique ont porté sur la perception de la réforme de la PAC, les retombées potentiels en termes d'enjeux agricoles et de sécurité alimentaire en Algérie ainsi que les effets en termes de factures d'importation des produits agricoles. Ces entretiens téléphoniques ont été d'une durée moyenne de 1h. Ceux menés par courrier électronique ont donné lieu à une page de réponse environs. Pour des raisons de confidentialité, les données seront présentées sous forme qualitative (verbatim) et de manière anonyme. Les analyses menées à partir des informations recueillies n'engagent que l'auteur et ne représentent pas l'avis des institutions d'appartenance des acteurs enquêtés.

Source : élaboré par l'auteur. Enquête PAC 2013- Effets Algérie, septembre-octobre 2013.

Ces perceptions traduisent également en filigrane des inquiétudes fortes (notamment des responsables des institutions publiques) par rapport aux questions de sécurité alimentaire et de l'instabilité des prix internationaux. Néanmoins, ce sont davantage les accords de libéralisation des échanges et les effets des politiques publiques nationales qui concentrent le plus d'attention. La réforme de la PAC relève ainsi d'un événement exogène de moindre importance, avec des effets indirects ambigus pour l'agriculture algérienne. Même si le processus de libéralisation n'est pas (plus !) le premier moteur des politiques publiques (Petit, 2012), force est de constater que les acteurs témoignent d'une forte appréhension vis-à-vis des réformes méditerranéennes dans le secteur agricole.

Perspectives d'un élargissement de la PAC aux pays du Sud de la Méditerranée

Dans le discours officiel, les perspectives d'évolution de la PAC devraient renforcer le triptyque « sécurité alimentaire- ressources naturelles- territoire » (Commission Européenne, 2010). En réalité, le nouveau visage de la PAC est le résultat de nombreux arbitrages entre des positions complexes accordant des niveaux d'importance distincts à la place de l'environnement et aux modes d'interventions publiques (Garvey, 2011). Néanmoins, les besoins d'une lecture « géopolitique » globale des enjeux de cette réforme sur la position de l'agriculture européenne (Alcaraz, 2012), notamment dans le contexte de crise économique mondiale (Bourgeois, 2012), et vis-à-vis des nouveaux enjeux internationaux (Boussard, Trouvé, 2010) se font de plus en plus ressentir.

Au niveau méditerranéen, la mise en perspective des effets de la réforme de la PAC sur l'agriculture algérienne dans le contexte de la politique de coopération régionale de l'Union Européenne (Rastoin et al, 2012) pourrait renforcer ces premiers résultats d'analyse et aboutir à quelques éléments de prospective de l'intégration euro-méditerranéenne. Dans un exercice de simulation prospective, des chercheurs avaient estimé le coût d'une politique alimentaire et agricole euro-méditerranéenne (Rastoin et al, 2012). Un tel élargissement au Sud pourrait représenter 25 milliards d'euros par an (soit 13 euros/an par citoyen euro-méditerranéen) à financer à part égal par l'UE et les PSEM. Un tel projet qui accorderait davantage d'importance aux politiques de sécurité alimentaire représenterait moins de 1,8% du PIB agricole européen, 4% du budget de la PAC actuelle, ou encore le quart des budgets européens accordés dans le cadre de la coopération régionale. Il induirait également moins d'efforts européens que ceux consentis dans le cadre des programmes destinés aux PECO (*Phare*) ou ceux des Balkans (*Cards*).

Au-delà de ces indications de « coûts », les arbitrages en faveur d'un tel élargissement devraient intégrer les enjeux d'une non-insertion des agricultures sud méditerranéennes dans la construction euro-méditerranéenne. Ils se posent notamment en termes de sécurisation des débouchés- approvisionnements pour les pays européens et sud méditerranéens (Belghazi, 2013). Les objectifs de « convergence » dépasseraient ainsi les seuls agriculteurs européens mais incluraient de manière pertinente ceux du Sud. Un tel scénario est loin d'être utopique. Porté par de nombreux acteurs institutionnels et de groupes de réflexion, il répondrait à une lecture globale autour du devenir agricole euro-méditerranéen (De Castro et al, 2012). Pour l'Algérie, cela impliquerait des effets directs en termes de réformes des politiques publiques et d'accompagnement européen en faveur d'un rattrapage agricole réfléchi.

Pour l'instant, la réforme de la PAC est perçue comme un « non événement » par les entreprises, les institutionnels et les acteurs algériens impliqués dans le secteur agricole. Pire, cette réforme est parfois perçue comme une volonté institutionnelle de l'Europe de renforcer la protection de ses agriculteurs, de mieux intégrer les agricultures des nouveaux pays européens et de maintenir (voire d'accentuer) les difficultés d'accès des produits sud méditerranéens aux marchés de l'UE. A tort ou à travers, les regards des acteurs algériens sont davantage portés sur les enjeux des accords d'association et sur les efforts des pouvoirs publics en termes de soutiens et de réforme des filières agricoles nationales. Cela est exacerbé par les enjeux de sécurité alimentaire et les effets de l'instabilité des prix internationaux des produits agricoles.

Au final, cette vision à court terme des acteurs algériens, répond aux ambitions minimalistes de l'Europe en termes de construction d'une politique agricole et alimentaire euro-méditerranéenne. Bien que celle-ci demeure difficile sur les plans techniques et financiers, elle n'en est pas moins possible à moyen-terme. Elle est même souhaitable (et souhaitée) en termes d'enjeux géostratégiques de part et d'autre de la Méditerranée (Abis 2012).

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The New European CAP Towards 2020

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A new EU decision-making framework for the CAP

The CAP, a cornerstone of the construction of the EU since 1962, has undergone since 1992 an almost continuous reform process. The latest overhaul (the fifth) has just been adopted. It took more than three years to complete the process and reach a political agreement between the European Commission (EC), the Council (the EU institution where the Member States (MS)' government representatives sit) and the European Parliament (EP).

Due to the entry into force of the Lisbon Treaty in December 2009, the EP was, for the first time, placed on an equal footing with the Council under the "ordinary legislative procedure" (before, the EP only gave its opinion and the Council decided alone). Furthermore, the overall amounts of future CAP funds were discussed under the broader discussions on the EU's "Multiannual Financial Framework" (MFF) for 2014-2020. In this case, the decision was taken at the level of the European Council (i.e. the European institution gathering Heads of State or Government of the MS) and the 'General Affairs' Council; the EP's consent was needed.

A reform for an enlarged EU, including a new Mediterranean Member State: Croatia

Croatia became the 28th EU Member State on 1 July 2013, twenty-two years after its independence and ten years after submitting its application for EU membership. The country's natural and climatic diversity allows for a wide range of agricultural production; its climate is Mediterranean along the Adriatic coast. The farming sector is structured around a dichotomy between a large number of small family farms (two thirds of farms have less than 3 hectares of land) and large state-owned specialized farms (e.g. for poultry production). Moreover, farm land structure remains highly fragmented.

Table 1
Some data on agriculture and forestry in Croatia

	Croatia	EU
Utilised agricultural area <i>Mha = million hectares</i>	1.3 Mha 66% arable land 26% permanent grassland 6% permanent crops	171.6 Mha 61% arable land 32% permanent grassland 6% permanent crops
Wooded Areas	2.5 Mha	177.7 Mha
Number of farms	177 000	11 757 000
Average farm size	5.3 ha	14.6 ha
Share of active population	13%	5.3%
Share of GDP	2.9%	1.2%

Source: Eurostat

Croatia's agricultural policy had to be aligned with CAP rules during the accession process. The three priorities identified in the Accession Partnership were the reinforcement of administrative structures, the setting up of a vineyard register aligned to EU standards, and the establishment of paying and control bodies. In addition, to facilitate accession Croatia received around €500 million for agriculture and rural development between 2007 and 2013.

Farmers will receive their first CAP payments in December 2013; the Croatian yearly national envelope for direct payments amounts to €373 million, but this amount will be reached only after 10 years of "phasing-in" (i.e. gradual introduction). €9.6 million are also foreseen every year for demined land returning to agricultural activities, also phased in. Moreover, Croatia may top up farmers' payments from its national budget, and provide coupled payments (i.e. linked to production) to suckler cows, sheep and goats. Regarding rural development, Croatia will have full access to funding from 2014 (i.e. no phasing-in). The yearly envelope will amount to around €313 million in 2014.

New Member States have campaigned for more fairness in the distribution of CAP funds

In the CAP reform debate, the New Member States (NMS) that joined the EU in 2004 (Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia) and 2007 (Bulgaria and Romania) were particularly concerned with the progressive reduction of disparities in the distribution of direct payments across MS (the debate on the "convergence of direct payments"). For historical reasons, in NMS the level of direct payments was around €200/hectare on average, against €300/hectare in older MS. NMS were also eager to be able to keep the payment systems that they had used since accession.

Alliances of NMS emerged repeatedly in the public debate, such as the declaration on the CAP post-2013 signed by nine NMS in Warsaw in February 2010, the Common Statement of Ministers of Agriculture of the Visegrad Group (a forum for cooperation in Central Europe made up of the Czech Republic, Hungary, Poland and Slovakia) plus Bulgaria and Romania, adopted in July 2012 or the Common Position of the Ministers of Agriculture of six NMS in November 2012.

These initiatives called on a fairer CAP and faster convergence of direct payments. NMS also asked for the possibility to further apply the Single Area Payment Scheme (SAPS, a simplified payment scheme based on a flat-rate payment applied in almost all NMS that was to be phased out), putting forward administrative difficulties that changing the system would imply.

They also asked for the possibility to allocate a share of their national envelopes for coupled support (i.e. payments linked to a specific product) to those sectors where Coupled National Direct Payments (CNDPs, top-up payments to farmers stemming from national funds) had been applied. As a result, in the new CAP the end-date for the SAPS system was extended until 2020 and the provision of up to 15% of a MS direct payments national envelope of coupled support is allowed, subject to conditions. In addition, every farmer will reach a minimum payment of 60% of the national or regional average by 2019.

Among NMS, the Baltic States (Estonia, Latvia and Lithuania) were particularly concerned with the convergence issue, as in these countries direct payments levels were the lowest in the EU and they considered that the new distribution proposed in the CAP legislative package did not go far enough in the redistribution process.

Several initiatives were tried by these NMS, including a meeting with the EC President in June 2012, where they asked for a specific clause in the MFF setting a minimum level for direct payments. These actions, together with other initiatives, were ultimately crowned with success, as the final CAP texts include a minimum threshold of €196/hectare to be reached by 2020, thanks to which payments in Baltic States will significantly increase in the coming period (graph 1).

External dimension of the CAP post-2013: no major changes

The reform did not significantly alter the external features of the CAP (export refunds, import tariffs). Export refunds are to be reduced over time and are disciplined under World Trade Organisation (WTO) rules; they are now applied to a limited number of products. Tariffs levels depend on multilateral and bilateral trade agreements.

In this context, which is also marked by the weaknesses of the Euro-Mediterranean Partnership, it will be worth looking into the evolution of trade flows between the United States and the Mediterranean area, as this country has recently reinforced its ties with Morocco and Jordan by signing Free Trade Agreements.

An overview of some CAP features of interest for the Mediterranean area

The Mediterranean area is never mentioned nor dealt with as such in the new CAP. Nevertheless, two of its declared strategic objectives are particularly relevant for the region: to address the challenge of food security and to promote the sustainable management of natural resources as well as climate action.

First pillar (P1): direct payments and market measures

The reform aims at increasing the sustainability of farming, *inter alia* through the compulsory "greening" of direct payments: farmers will receive a payment per hectare for respecting certain agricultural practices beneficial for the climate and the environment (30% of national envelopes).

Regarding the convergence of direct payments, MS may choose to adopt a regional approach for its implementation, based on agronomic criteria. Furthermore, MS will be allowed to provide coupled support for certain sectors (for instance grain legumes, rice, nuts, olive oil, fruit and vegetables, sheep and goat meat, beef and veal), and a specific payment for cotton. In addition, several measures aim at improving generation renewal in farming: for instance, it will be mandatory for MS to increase payments for young farmers by an additional 25% for five years (up to 2% of the national envelope). Moreover, small farmers may benefit from the optional "redistributive payment" on their first 30 hectares, on which MS may spend up to 30% of their envelope.

Regarding market measures, the reform confirmed the end of milk quotas in 2015, of sugar quotas in 2017, and of wine planting rights in 2015 (however a new system of authorization of vine plantings will be introduced from 2016). The reform also seeks to strengthen farmers' bargaining power in the food chain, by opening the possibility for recognition of producer and interbranch organizations in all sectors (with specific rules for the fruit and vegetables and olive oil sector). Under certain conditions, farmers will be able to collectively negotiate contracts for the supply of, for instance, olive oil and cereals. Moreover, the EC will be able to take emergency measures to respond to market disturbances, financed by a crises reserve (up to €400 million every year, deducted from funds for direct payments).

Second pillar of the CAP (P2): rural development

As in the previous CAP, Member States or regions will decide which measures they want to implement in priority, to be chosen from a "menu" of measures that was defined at EU level. Potential topics include improving water management, preventing forest fires, mitigating climate change or providing support for insurance schemes against the consequences adverse climatic events. MS will have to spend at least 30 % of their rural development funding on some environment and climate related measures.

Rural development actions are "co-financed" (i.e. EU funds finance only a share of P2 actions, with national exchequers contributing the rest). Co-financing rates have been set at higher levels (85%) for less developed regions, of which several are Mediterranean, and smaller Aegean islands, to compensate for their difficulty in finding national funds, at the request of the EP.

Less funds available for the CAP for 2014-2020

The CAP accounts for a considerable share of the EU budget: € 58.5 billion in 2013, i.e. 39% of the budget. This amount is larger than Structural and Cohesion funds (€ 54.5 billion), which finance the EU's regional policy.

The MFF for 2014-2020 was adopted after several months of tough bargaining over policy priorities and their funding, in a particularly difficult context of economic crisis and overstretched public finances. The final agreement set the MFF envelope to € 960 billion (in 2011 prices). This means €34 billion less than the total amounts available for 2007-2013, for an EU with one additional MS. Moreover, it has been the first time in history that an MFF has been allocated less funds than its predecessor.

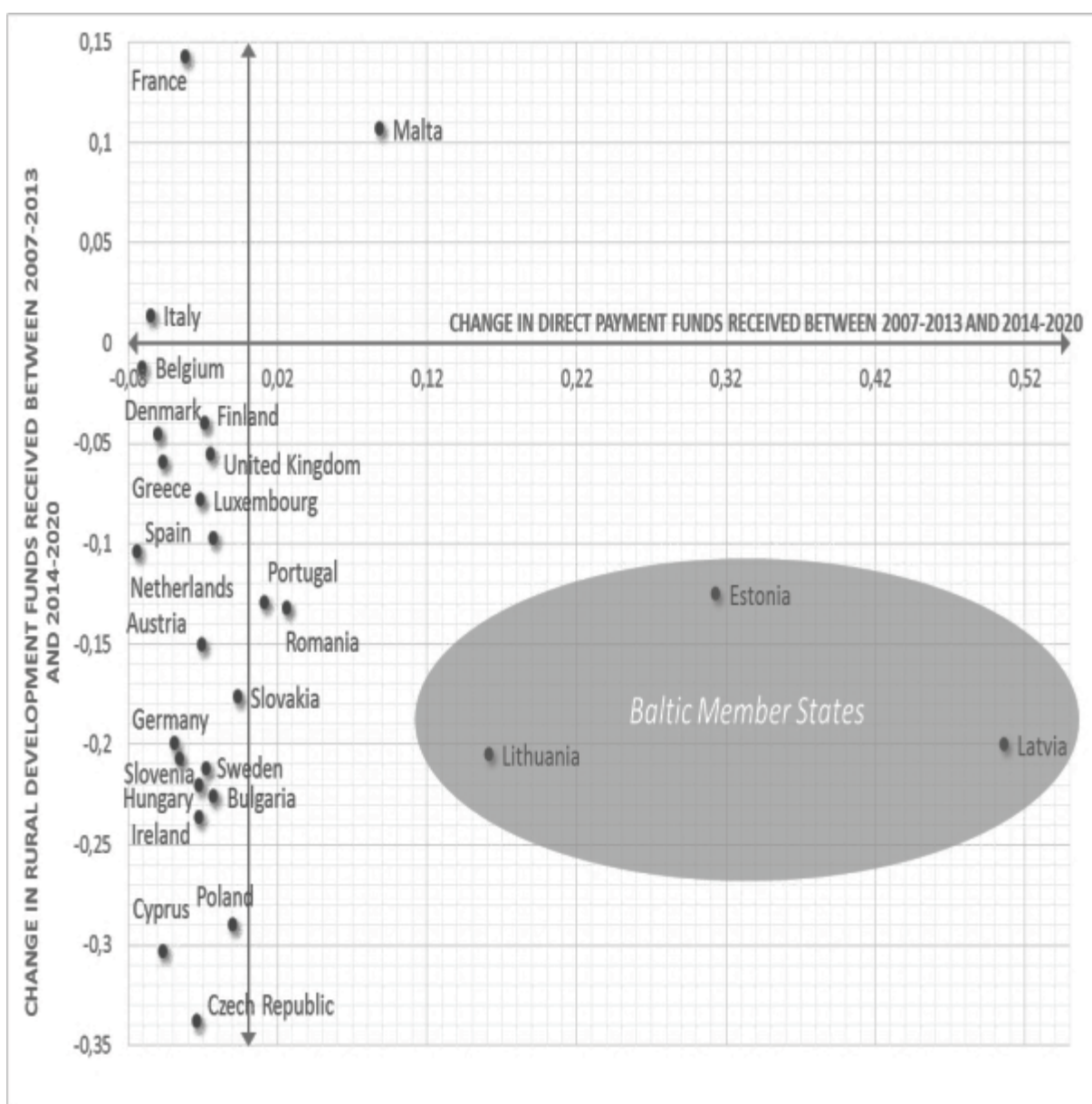
Table 2
A comparison of CAP funds in 2013 and 2020

<i>MFF Heading 2</i>	2013 level	2020 level	2020 compared to 2013
P1 - Direct Payments and Market Measures	43 180	37 605	-13%
P2 - Rural Development	13 890	11 426	-18%
P1+P2 = TOTAL CAP	57 070	49 031	-14%

For 2014-2020, CAP funds in the MFF agreement amount to € 362.7 billion, i.e. 38% of the global envelope. Around $\frac{3}{4}$ of CAP funds (€277.8 billion) have been allocated to P1 and $\frac{1}{4}$ to P2 (€84.9 billion). As a consequence, for the EU as a whole, in 2020 P1 funds will be reduced by 13% as compared to 2013 levels, and P2 funds by 18% (table 2). As mentioned above, Baltic MS will see their P1 allocations increase over the next

period; this is also the case for France and Italy's P2 funds, thanks to discreet allocations received from the European Council (graph 1). However, MS will have the possibility to transfer funds between pillars (up to 15% in both directions, even more for some MS) and reinforce one of the pillars of their choice, which will affect these figures.

Graph 1
Evolution of CAP funds allocations per Member State between 2007-2013 and 2014-2020



Possible future scenarios for the CAP post-2020

This reform was marked by an institutional innovation: the emergence of the EP as a co-legislator. One of the most commented features of the new CAP has been the wide latitude given to MS to choose which measure to implement (e.g. coupled payments or not) and to shift funds between pillars. Furthermore, whereas past revisions have strengthened P2, this reform puts a halt to the "ruralisation" of the CAP, not only in financial terms but also by including in P1 some items traditionally dealt with in P2 (e.g. measures for young farmers or for organic farming).

The next CAP reform may be affected by several factors: the financial importance given to the CAP in the next MFF (will the funds for the CAP continue to decrease?); the number of MS in the EU (will it take place in an enlarged, or reduced, EU?); the fate of multilateral negotiations, in particular in the WTO, which affect the legislative autonomy of the CAP; the situation on world food markets (volatility, and the impact of climate change).

More specifically, a number of issues could be raised: concerning direct payments, will convergence of payments per hectare towards a flat rate in the EU be an objective of the reform? What will be the future of the components of direct payments (e.g. will "greening" be reinforced)? Will the two pillars structure be maintained, or will there be a single agro-rural pillar (that could be co-financed by MS) with parts of P2 hived off into cohesion policy? What kind of market measures will be maintained in the CAP (could counter-cyclical measures be included)? The emergence (or not) of a dominant model from the implementation of the current reform will provide food for thought.

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MedSpring

MEDiterranean Science, Policy, Research and Innovation Gateway

MedSpring is an EU funded project with the objective to encourage and strengthen the Euro-Mediterranean Cooperation on Research and Innovation by creating a dialogue and coordination platform of governmental institutions, research organizations, associations and civil society. It focuses its efforts around three major societal challenge themes: resource efficiency (particularly water), high quality affordable food and energy.

It also addresses capacity building and analysis of societal challenges to increase respectively research capacity and shared knowledge and cooperation on common areas of interest. It will support synergies and networking to strengthen joint activities and joint cooperation in EU programmes, and monitoring regional RTD cooperation and policies.



Financed by the 7th Framework Programme of the European commission, involving 28 partners from all around the Mediterranean, and supported by the Monitoring Committee for the Euro-Mediterranean S&T Cooperation in RTD (MoCo), MedSpring gathers expert voices including leading scientific communities as well as policy makers and stakeholders, bridging policy and research. The project is coordinated by CIHEAM-MAI Bari.

The principal objectives of MED-SPRING are:

- to develop and support the dialogue between EU - MPCs by bringing together policymakers and stakeholders from each MPC and EU Member states to create a dialogue and action platform to identify common interest in research areas;
- to set up S&T priorities;
- to support capacity building activities and enhance the interaction between different cooperation instruments of the EC to promote actions in order to monitor, develop and contribute to creating synergies among the various S&T cooperation programmes between MPCs/EU and foster the participation of the MPCs in the Framework Programme.

More information on
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La nouvelle PAC a-t-elle oublié la Méditerranée ?

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Depuis de nombreuses années, la libéralisation des échanges a été mise au cœur des discussions et des négociations visant à une plus grande intégration de l'espace euro-méditerranéen. Ce fut le cas notamment en 1995 lors du lancement du processus dit de Barcelone. L'objectif très ambitieux de créer une zone de « prospérité partagée » devait être réalisé grâce à la création d'une zone de libre-échange euro-méditerranéenne (ZLEEM) en 2010. On en est encore loin en cette fin 2013. Il est vrai que nul ne songea alors à souligner que des obstacles politiques considérables, notamment une frontière interdisant tout échange légal entre l'Algérie et le Maroc, devraient être surmontés pour réussir une telle démarche !

Cet objectif de libre-échange était sans doute utopique. Il a eu en outre des effets très négatifs en agriculture, focalisant l'attention sur un problème difficile à résoudre, la libéralisation de l'accès aux divers marchés, que ce soit pour les fruits et légumes au nord et les céréales au sud, et négligeant des domaines de coopération potentiellement très féconds mais encore très mal exploités. C'est dans ce contexte général du rôle de la libéralisation des échanges agricoles dans les débats et les négociations que doit être examiné l'effet de la Politique agricole Commune (PAC) sur les pays partenaires méditerranéens (PPM) de l'Union européenne (UE).

Une libéralisation difficile

Le point le plus sensible des débats et des négociations sur les échanges internationaux en Méditerranée est depuis longtemps l'accès au marché européen pour certains produits agricoles, tout particulièrement les fruits et légumes en provenance des PPM. Ces derniers ont en effet un avantage relatif clair dans la production de ces produits.

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Toute libéralisation des échanges devrait donc entraîner une augmentation de ces flux, au bénéfice des pays tiers mais au détriment des producteurs des mêmes fruits et légumes en Europe. Or ceux-ci disposent d'organisations professionnelles puissantes sachant faire pression sur les pouvoirs publics, tant au niveau communautaire qu'au niveau national dans des pays comme la France, l'Espagne ou l'Italie. Et cette opposition a souvent été présentée comme un obstacle politique majeur au mouvement général de libéralisation sur lequel était fondé le processus de Barcelone.

Pourtant deux projets de recherche européens, soutenus par la Commission Européenne dans le cadre du 6e PCRD et conduits par deux instituts du CIHEAM (MEDFROL à Chania et EUMED-AGPOL à Montpellier) en collaboration avec de nombreuses institutions de recherche, ont bien montré que les enjeux économiques liés à la protection aux frontières des marchés européens des fruits et légumes étaient très largement surestimés.

Certes, une réduction de la protection aux frontières entraînerait généralement une augmentation des importations venant des PPM. Mais cette augmentation, très variable selon les produits et les pays, ne serait pas massive, sauf peut-être dans certains cas particuliers, par exemple peut-être les cerises venant de Turquie. Autrement dit, les pertes potentielles des producteurs européens, même si elles peuvent être sérieuses dans des cas bien spécifiques, ne constituent pas des enjeux économiques majeurs, expliquant le blocage au niveau politique (Jacquet et al, 2007).

Ces résultats, diffusés avant le lancement des débats sur la réforme de la PAC, y compris auprès des plus hautes instances de la Commission Européenne, n'ont cependant pas influencé l'évolution de cette PAC.

En effet, le régime de protection du marché des fruits et légumes, qui font partie du premier pilier, n'a pratiquement pas changé, les principales négociations relatives à ce pilier ayant porté sur les paiements directs: les modalités de leur attribution et leur plus ou moins grand degré de « verdissement ». En ce sens, on peut dire clairement que la réforme de la PAC a totalement ignoré la Méditerranée. Dans un tel contexte, l'idée d'une politique agricole euro-méditerranéenne commune, qui étendrait en quelque sorte la PAC européenne à l'ensemble des pays partenaires méditerranéens, apparaît comme totalement utopique, même si elle est souvent défendue avec vigueur par le think tank *IPEMed* basé à Paris.

Quelques concessions à la marge ont été faites sur les protections aux frontières pour les fruits et légumes dans le cadre des accords bilatéraux entre l'Union Européenne et des pays tiers spécifiques. Il faut cependant être conscient que, même si ces accords pour l'agriculture s'inscrivent depuis le milieu des années 2000-2010 dans le cadre d'une relance du processus régional de Barcelone, ils ont continué à être négociés de façon bilatérale. Au total tout s'est déroulé très lentement et selon des dynamiques spécifiques pays par pays (Abis, 2013).

C'est ainsi qu'un accord a été conclu avec la Jordanie en 2007, mais les volumes d'échanges concernés sont très faibles. Avec l'Égypte un accord a été signé en 2010 ; il donne à chacune des deux parties un accès amélioré au marché de l'autre ; mais il laisse des exceptions notoires, par exemple pour l'accès au marché européen des tomates, des concombres, du riz, des artichauts ou des fraises d'origine égyptienne. Enfin, un accord avec le Maroc a été atteint et mis en œuvre en 2012, malgré de vives oppositions des organisations agricoles européennes, très bien relayées au Parlement Européen. Néanmoins, cet accord bilatéral illustre bien que des progrès sensibles ont été faits dans le sens de la libéralisation bilatérale des échanges (par exemple 55 % de la valeur des exportations marocaines entrent maintenant en franchise dans l'Union européenne, sans contingents et sans aucun calendrier). Mais pour des produits importants, qui ont été jugés « sensibles » (ail, clémentine, concombre, courgette, fraise et tomates), de fortes contraintes ont été négociées au niveau politique le plus élevé. Les évaluations empiriques sur modèle des effets de ces accords suggèrent que leur portée sera limitée (Garcia Alvarez-Coque et al, 2011). Au total donc, ces concessions européennes, négociées dans le cadre de la nouvelle politique de voisinage, n'ont pas changé radicalement les modalités d'accès aux marchés européens et le processus de libéralisation reste très graduel.

Cependant, pour les PPM on constate une ouverture significative de leurs marchés aux importations de l'UE. Ainsi dans le cas de l'Égypte, on note une libéralisation quasiment immédiate pour de nombreux produits pour lesquels l'UE a un intérêt offensif (produits laitiers, viandes, produits transformés) et peu de produits considérés comme sensibles sont exclus. Pour le Maroc, 45% des importations en valeur en provenance de l'UE sont libéralisées, part qui atteindra 70% en 2020 (El Hadad-Gauthier et al, 2012).

Une nécessité: le retour aux fondamentaux

C'est bien dans le cadre de cette politique de voisinage, beaucoup plus que dans l'évolution de la PAC, que se traitent les rapports agricoles euro-méditerranéens. Quelles sont alors les perspectives en la matière ? En particulier, que peut offrir le nouvel instrument ENPARD (*European Neighborhood Program for Agriculture and Rural Development*) proposé par la Commission Européenne en 2012 (Ciolos, 2012) ?

Pour répondre à ces questions, il faut d'abord focaliser l'attention sur la situation de l'agriculture et du développement rural dans les PPM. Les résultats d'un autre projet de recherche financé par la Commission européenne, dans le cadre du 7e PCRD, permettent de mettre à jour les connaissances sur ce sujet. Il s'agit du projet SUSTAINMED coordonné par l'Institut du CIHEAM à Montpellier en collaboration notamment avec celui de Chania, projet qui vient de se terminer en 2013. Trois caractéristiques de la situation méritent d'être soulignées ici.

- 1) La pauvreté rurale continue d'être une source de tensions et de préoccupations très sérieuses dans la plupart des pays de la région; ceux-ci ont été obligés d'importer des quantités très importantes et rapidement croissantes de céréales et autres produits alimentaires de base pour assurer l'approvisionnement de leurs populations; et les problèmes de gestion des ressources naturelles, notamment l'eau, sont particulièrement aigus et deviennent de plus en plus urgents.
- 2) De nombreuses politiques publiques ont été mises en place depuis plusieurs décennies pour faire face à cette situation. Et elles ont permis des progrès significatifs sur plusieurs fronts. Ces constats ne sont pas nouveaux et ils sont généralement bien connus. Cependant, ce qui apparaît comme plus nouveau, c'est la robustesse des diagnostics amenant à considérer que les politiques existantes ne sont pas à la hauteur des défis soulevés par la conjonction de ces crises sociale, économique et écologique. L'aspect le plus visible de cette crise des politiques publiques est le coût budgétaire croissant

des interventions sur le marché du blé en particulier. Combien de temps sera-t-il possible de financer les subventions à la consommation, le soutien des prix aux producteurs nationaux et le paiement d'importations de plus en plus onéreuses ? Divers signes suggèrent une prise de conscience relativement récente de l'ampleur des problèmes à résoudre au sein des pays de la région, alors que cependant les incertitudes politiques liées aux suites du « printemps arabe » dans plusieurs pays retardent l'adoption de mesures radicales et novatrices.

- 3) Enfin, il faut souligner que les situations varient beaucoup d'un pays à l'autre. Par ailleurs, la Turquie constitue un cas vraiment spécifique, même si là aussi la nécessité de lutter contre la pauvreté rurale est apparue de plus en plus impérieuse au cours des années récentes. Au total, l'importance des problèmes à résoudre et la spécificité des situations dans chacun des PPM sont telles que la responsabilité principale repose sur les gouvernements de ces pays. Les Européens ne peuvent avoir qu'un rôle second, celui de soutien attentif, ou d'accompagnateur dans le meilleur des cas. Ils doivent aussi bien sûr éviter d'être des obstacles au développement de ces pays si proches.

Y a-t-il des leçons de la politique agricole européenne utiles à tirer pour les PPM ?

Revenant à la nouvelle PAC, on a vu qu'elle n'apportait rien de nouveau pour les PPM, sur leur principal sujet d'intérêt : l'accès au marché européen. Cette politique est-elle néanmoins porteuse de leçons utiles pour eux ? La réponse à cette question est « oui peut-être », à condition bien sûr de ne pas considérer cette politique agricole comme un modèle à suivre. Il s'agit plutôt d'une référence historique utile à connaître et à prendre en compte. Trois aspects seront abordés ici.

Depuis 1992, la PAC a été réformée pour rapprocher le niveau des prix intérieurs de celui du prix mondial, avec instauration de paiements directs aux producteurs, initialement pour compenser la baisse du prix de soutien. Malgré de nombreuses vicissitudes, on peut dire aujourd'hui que cette réforme a été réussie. Certes, il a fallu de nombreuses années pour la mettre en œuvre et le résultat final, en particulier la répartition des aides publiques, suscite critiques et controverses très vives. Mais nul ne suggère de revenir en arrière car de nombreuses distorsions, aux conséquences diverses et négatives, ont été éliminées.

Or plusieurs pays tiers méditerranéens devront réformer leurs interventions sur les marchés agricoles. Peut-être pourraient-ils alors réduire aussi les distorsions liées à ces politiques, mieux cibler les subventions, en réduire le coût budgétaire et dégager des ressources financières pour financer des compensations transitoires aux perdants, comme il y en a toujours dans tout processus de réforme.

La deuxième leçon porte sur l'existence de deux « piliers » dans la PAC. Certes, l'histoire du deuxième pilier, consacré au financement des actions de développement rural, a été chaotique. Ce n'est que progressivement que l'objectif affiché de développement rural a été réellement poursuivi. Mais l'idée de distinguer deux grands objectifs et de définir des actions spécifiques pour chacun d'eux a probablement constitué un progrès à de nombreux égards, notamment en clarifiant les débats sur ces politiques. Remarquons que le plan « Maroc vert » repose aussi sur la distinction entre deux grandes catégories d'objectifs et de mesures et utilise la même terminologie de deux piliers, le premier destiné à soutenir le développement de « l'agriculture moderne » dans les zones favorables et le second le développement de « l'agriculture solidaire » dans les zones difficiles. Ce type de distinction et de différenciation pourrait être utile pour d'autres pays.

Enfin certaines des expériences européennes dans le domaine du développement rural pourraient être pertinentes dans les PPM. Nous pensons aux groupes d'action locale (GAL) des programmes LEADER et au rôle des produits de terroir, protégés par des Indications Géographiques (IG). Les premiers reflètent la prise de conscience que tout développement rural implique la mobilisation des ressources au niveau local, dans un processus « bottom up », et donc toute politique publique (processus par essence « top down ») doit reposer sur une participation effective des forces vives locales à la conception et à la conduite des actions. Cette exigence facile à formuler n'est pas facile à mettre en œuvre, le contexte socio-politique s'y prêtant mal dans de nombreux pays du sud. Quant aux produits de terroir, ils représentent un atout potentiel du développement local, déjà exploité d'ailleurs dans plusieurs PPM, tout particulièrement la Turquie, qui a adopté une législation très ambitieuse sur la reconnaissance des produits de terroirs, et le Maroc où les politiques publiques de lutte contre la pauvreté rurale, en particulier le deuxième pilier du plan 'Maroc vert', donnent une place privilégiée à ces mêmes produits.

Implications pour la coopération en Méditerranée

Les développements qui précèdent invitent les Européens à faire preuve de beaucoup d'humilité en matière de coopération, particulièrement dans le domaine si difficile du développement rural. Le lancement du programme ENPARD peut être interprété à cet égard comme résultant d'un certain repentir intellectuel, celui de ne pas avoir accordé dans les activités de coopération antérieures assez de place à la lutte contre la pauvreté rurale, pourtant si criante dans plusieurs pays tiers. Elle est donc tout à fait bienvenue. Mais il ne faut pas se cacher les difficultés de cette tâche. Les premières impressions recueillies dans les PPM soulignent en particulier l'ampleur des problèmes bureaucratiques à résoudre au sein de la Commission, tant à Bruxelles que dans ses Délégations, et dans les administrations publiques des pays tiers, tant au niveau national que dans les instances décentralisées. Faire travailler ensemble dans des programmes novateurs tous ces acteurs publics apparaît bien difficile.

Par ailleurs, c'est un nouveau regard sur le rôle de la libéralisation des échanges dans les relations avec les PPM qu'il faut porter. Nous avons dénoncé au début de cet article le rôle central qui a été donné à cette libéralisation des échanges dans le processus de Barcelone. La rhétorique l'avait emporté sur l'examen lucide des obstacles à surmonter. Il n'empêche que souvent un meilleur accès aux marchés européens serait bénéfique pour les pays tiers. A un moment où les négociations multilatérales à l'OMC sont paralysées et où les concurrences entre régions s'exacerbent, du fait de la multiplication des accords bilatéraux et régionaux, l'avenir des relations commerciales euro-méditerranéennes est incertain mais continue à avoir une importance stratégique majeure.

C'est donc une attitude pragmatique qu'il faut encourager en la matière. Par exemple en favorisant le partenariat entre les entreprises du Nord et du Sud sur la base de logiques de complémentarités. Par ailleurs, il convient d'adopter une vision large des questions de libéralisation, incluant mais ne se limitant pas aux instruments, tels que droits de douanes et contingents, qui affectent directement les échanges de produits. Les normes publiques et privées sont devenues des 'mesures non tarifaires' parfois très importantes, ce qui milite fortement pour une promotion de la convergence des normes. Et les enjeux autour de la libéralisation des services sont parfois plus importants que ceux liés aux échanges de produits.

Enfin de nombreux autres domaines de coopération offrent des perspectives de développement potentiellement très fructueuses dans les domaines de l'agriculture et du développement rural. Certes, le cadre de cette note se prête mal à de longs développements sur ces sujets. Mais nous pouvons au moins citer deux domaines que nous connaissons bien dans lesquels la coopération pourrait être avantageusement développée : celui de l'enseignement supérieur et de la recherche agronomiques et celui des coordinations dans les filières agro-alimentaires. Dans ce dernier domaine, nous pensons qu'à côté des politiques les acteurs économiques (entreprises et organisations professionnelles) ont un rôle majeur à jouer. En témoigne, par exemple, la création récente (décembre 2012) d'un comité mixte maroco-espagnol de coordination dans le secteur des fruits et légumes.

Notre expérience quotidienne en matière d'enseignement supérieur au CIHEAM et ailleurs nous montre l'intérêt de cette action de coopération et nous avons bien conscience que nous ne satisfaisons qu'une toute petite partie des besoins en la matière. De même dans le domaine de la recherche, notre expérience des actions en réseaux, impliquant un vrai partenariat entre équipes travaillant tout autour de la mer commune, démontre la fécondité de ce type de dispositifs. Et, là encore, beaucoup plus pourrait être fait, comme le démontre d'ailleurs le succès de l'ERANET ArimNet. Ainsi, notre plaidoyer est que si la PAC a effectivement oublié la Méditerranée, il existe beaucoup d'autres pistes pour corriger cet oubli.

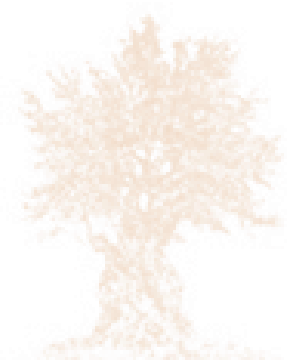
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ERANET-Med

The kick-off meeting of the ERANET-Med programme was held in Istanbul on 4 and 5 November 2013. The main aim of the programme is to enhance Euro-Mediterranean co-ownership through innovation and competitive research in the societal challenges of the region.

The project aims at reducing fragmentation of programming in the Mediterranean region by increasing coordination among national research programmes of European Member States, Associated Countries and Mediterranean Partner Countries.



Following the Conference of Barcelona on 2012, the ERANETMED responds to the need to develop new ways of "sustainable" cooperation, in which both European and MPC partners will equally participate and benefit from the output and the opportunities created by the project.

The ERANETMED will consider a broad area for research, addressing not only the most important societal challenges of the region but also actions to enhance innovation through applied research, capacity building, mobility and clustering. Its action will result in concrete co-operation between research programmes, such as networking, definition of strategic scientific activities, research structuring for long-lasting and stable cooperation beyond ERANET.

The main goals addressed by the project will be establishing a framework for communication and coordination of programme owners and managers related to S&T cooperation from Europe and Mediterranean Partner Countries (i), strengthening Euro-Mediterranean R&I Cooperation promoting joint activities (ii), developing joint funding schemes and procedures between partners (iii), supporting long-term and stable Euro-Mediterranean cooperation (iv) and strengthening MPC capacities to enhance research and innovation and increase the impact of research on the socio-economic development of the region (v).

It also implies the achievement of coherence among research, policy and funding instruments to contribute to regional societal challenges, to have a real impact on the society and to establish synergies with other programmes and instruments.

More information on
www.eranetmed.eu

CAP reform and Euro-Mediterranean partnership: lessons for a new agenda of cooperation

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An ambitious reform?

Agriculture stands out as a strategic sector of the societies and economies of the Mediterranean basin due to four major issues: food insecurity, vulnerability of farming systems, environmental challenges and inefficient rural development.

In the next paragraphs we wonder first, whether the European Union (EU) Common Agricultural Policy (CAP) reform represents a true reform in the history of EU agricultural policies; second, whether CAP represents a change for Spanish agriculture, as one of the mayor beneficiaries of public support to agriculture; and third, whether some lessons can be drawn from the CAP and from the history of cooperation between the EU and Southern and Eastern Mediterranean countries in order to build a new agenda of partnership, with the goal of a shared development in the Euro-Mediterranean region.

A long and complex process

Nobody can neglect that negotiations to reach an agreement for the post-2013 CAP represented a real example of democracy, sometime a little complex. All stakeholders were to present their arguments and the decision-making process illustrated the advantages of the co-decision procedure involving *trilogues* including the Council, the Commission and the Parliament. In a real sense, the agreement achieved in June 2013 reflects what the EU society wishes for the role of agricultural policies. And what are such wishes?

First, the CAP reflects the appreciation of EU citizens of the value of agriculture in providing food security, from the local and international perspectives. The public good "agriculture" is supported through a budget of around 50 billion euro for 2014-2020, which is lower in real terms to the budget in the previous period 2007-2013, but the fears for dismantling the public support to agriculture have been neutralised.

Second, there is some consciousness that farming systems are under pressure. Although the agro-food sector is performing well in the last years, as it is the case in Spain, many small farms don't find their place in a more competitive world, where increasing numbers of exporters are emerging in sectors more and more globalised as it is the case of Mediterranean products such as fresh fruit and vegetables, wine and olive oil, among others. Farm incomes are under pressure due to the farmers' weak position in the value-chain, and to the increasing costs of energy and other inputs. The CAP reform has taken some limited steps towards keeping the support to small farmers, with focus on young agricultural population. As we indicate later, there is also a strengthening of producer organizations, which will be encouraged in all sectors. Special provisions for these organizations, such as the extension of rules, are applicable to fruit and vegetables and will be extended to olive oil.

Third, the environmental challenges are considered as relevant in the new discourse. However, the Commission's proposal was not well understood in many sectors of Southern Europe. In particular, Spain is a country where land conservation, biodiversity, organic farming, and other environmental functions, deserve a great deal of support. It is the same thing for Italy or Greece. The final agreement on green payments and requirements on farms kept the main elements initially proposed by the Commission, such as the maintenance of green pastures, the crop rotation and diversification in farms over 10 hectares of arable land, and the obligation of an Ecological Focus Area (EFA) when the arable land is over 15 hectares. Organic farming is considered to fulfil *ipso facto* the environmental obligations. Although the requirements don't affect most small farms, the measures were not well appreciated by many farmers who don't see the greening of the CAP as an opportunity to justify public support. Rather they believe that environmental obligations could evolve in extra constraints that prevent EU agriculture from competing in a globalised market.

Fourth, the rural development pillar keeps playing a secondary role with respect to the CAP's first pillar (income and market policies). However, there are some positive messages like the horizontal concept of technology transfer and innovation that aims at enhancing networking among rural actors, extension services, universities, agricultural organizations, with a view at the territorial development, defence of agricultural ecosystems, climate change mitigation and adaptation, risk management and social inclusion. As more of these policies are to be co-funded by national and regional authorities, the design of rural development programs should be participatory, efficient and consistent with the Europe 2020 strategy. The financial crisis in Spain is not of much help to facilitated projects that need national funds co-financing the EU contributions.

In a country like Spain, the CAP budget between 2014 and 2020 will be subjected to limited cuts in nominal terms, with respect to previous periods. Around 6,5 billion euro from EU funds will keep reaching the Spanish agriculture and rural sector. A question emerges on whether the reform adopted in June was really the reform needed by Mediterranean agriculture in Spain. Let us refer to this topic, by looking at the Spanish negotiating strategy in the CAP discussions.

Resistance to change

The CAP is able to change but perhaps too slowly. Let us comment the CAP's general approach to understand its resistance to change. The "first" CAP, understood as mainly an "agricultural" policy died in 1992. Then, it was born a budgetary approach that we call here 'Common Agri-budget Policy' (CABP). One criticism to such policy is that it maintains to a great extent the *status quo* among countries and sectors. An underlying rationale behind the policy was to limit redistribution of the agricultural expenditure.

The current CAB P is in essence a *conservative policy*. It recognizes and protects the support received by producers under the old CAP before 1992. When markets' measures were removed, new forms of support were designed to benefit the former beneficiaries. The criteria in the new CAP will be managed within the national envelope system –which very much depends on the past support-. In brief, CAP is a good example of path dependence support, which reflects national interests. This can be exacerbated at Member State level as the new eligible area for direct payments can be significantly restricted, mainly to the previous eligible area. The new role on the European Parliament has contributed to modify this essential fact, though has not been corrected. The EU is still working very much more as an inter-governmental body than as a political union. The real actors seem to be the Member States, whose goal is to keep the CAP expenditure in its territory. It seems a paradox but, in the older EEC the CAP worked more as an agricultural policy than in the current EU, despite that the real integration is now, in theory, deeper.

Spain is a good example of that kind of public strategy that minimises changes. Spain is one of the largest European agricultural producers: it represents the 10.5 percent of the EU-27 output of agricultural industry (fourth producer in 2011) and the 13.8 percent of the Gross Value Added at basic prices (third for the same year). After France, Spain is the second beneficiary of CAP expenditure: the 13.5 percent of the European Agricultural Guarantee Fund (EAGF) and the 8.5 percent of the European Agricultural Fund for Rural Development (EAFRD).

Direct payments are the icon of the conservative approach. In the case of the EU-27 its weight in the total budget is the 68.5 percent and in the case of Spain the 72.6 percent. In addition, Spain presents all kinds of agricultural systems that involve asymmetries in support levels so that any substantial change in the CAP rules activates redistributive forces. Finally, the conservative approach facilitates domestic political management in a country subjected to regional tensions.

During the negotiations for the CAP reforms in 2014-2020, and following these principles, Spanish government favoured the successful position of softening some of the first Commission proposals, reducing the redistributive effects and the internal convergence in levels of payments. In the case of the *greening*, Spain's Ministry of Agriculture successfully negotiated a more open and flexible rule than the Commission's original plan.

In summary, Spanish government could achieve its negotiating targets, shared by most of regional governments. The redistributive impact of the reform was softened in a way that we can consider the final result of the negotiations as a support to a *right's policy*. Many farmers are afraid of losing from the redistribution of payments, leaving the expectation of a more efficient and fair agricultural policy to a secondary role.

Lessons for the Euro-Mediterranean cooperation

One result of the conservative approach in the CAP is that things don't change very much in the international scene. As regards to Euro-Mediterranean relations, the adopted framework does not create a common agricultural and food space in the Euro-Mediterranean region. Nor this was the reform's intention, indeed. However, let us see some positive aspects. Are there lessons to be drawn from the CAP, at least as an emerging step?

The CAP has considered, even in a timid way, measures to help the competitiveness of rural areas based on innovation, preservation of ecosystems, development based on local governance and social inclusion. The EU and Mediterranean Partners Countries (MPCs) can take advantage of the available expertise in strengthening local initiative networks, involving stakeholders, NGOs, and public research and extension institutions.

One interesting insight comes from the ways of collaboration amongst farmers and actors of the food chain, opened by the CAP. Producers' organisations (POs), associations of producers' organisations (APOs) and Inter-branches can be promoted not only in the fruit and vegetable sector but also in others. Cooperation activities are also supported through the new Rural development programs; the LEADER approach is reinforced and is extended to the other Structural Funds; the operational groups are a key element of the European Innovation partnership on Agricultural productivity and Sustainability.

There are already examples of transnational POs and APOs inside Europe. They could be extended to non-EU Med producers and contribute, for instance, to an increase transparency of the market and to the quantity and quality adaptation of production to the demand. In view of this, why not envisage an association of producer organisations comprising Moroccan and European growers for tomatoes; Moroccan, Turkish and European growers for citrus fruits; Tunisian, Moroccan and European growers for olive oil? Why not envisage closer links among European and Mediterranean third country inter-branch organizations?

Bi-national or regional committees can also be useful tools to promote cooperation. A great example is the Spanish-Moroccan Tomato Committee, which follow the line of the Spanish-French-Italian Joint Committee that helped reduce tensions among these countries. This is the way which has been used in the past in order to end the "Spanish – French strawberry war" which took place during several years after Spanish accession to the EU.

Obstacles faced by joint strategies in the value chains in the Mediterranean countries significantly resemble those that we encounter in Europe and, in particular, in the EU's new Member States: namely, the coexistence of large commercial farms alongside numerous small growers and the traditional use of cooperatives as political tools for controlling agriculture and its people, to mention but two examples. Capacity building is already envisaged under the European Neighbourhood Programme for Agriculture and Rural Development (ENPARD), yet it should not be restricted to public players; it should be extended to include also economic agents in order to allow producers and growers to exchange their mutual experience.

The European Union is currently building up a solid base of expertise not only in the field of rural development but also in the analysis of local situations, in monitoring and assessing rural development programmes and in strengthening local initiative networks. Equally useful would be the initiative of the European School of Administration to support and speed up a process involving the exchange of experience between administrations and economic and social players. Joint programs between EU and Mediterranean Partner Countries' research centres like Sustainmed or ERANET-Med have been considering the problems of sustainable agri-food systems and rural development from an Euro-Mediterranean perspective. The International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM) can be highlighted. This organization has played a very important role in establishing networks, not only among researchers but also among policy-makers and economic agents in agriculture on both shores of the Mediterranean.

Several questions arise on both shores of the Mediterranean: how is it possible to maintain a substantial rural population, to prevent rural exodus that fosters pressure on urban areas and illegal immigration, and to offer that population a decent livelihood and job opportunities? Among other useful and important measures which are to be supported in forthcoming rural development programmes, we might highlight all those activities that promote cooperation between farmers and players in the value chain, in addition to the LEADER initiative. In this connection, ENPARD could build on the basis of the LEADER initiative and of the experience acquired through the SAPARD programmes which made it possible to prepare the accessions of 2004 and 2007.

Is there some light in the future?

Some interesting insights emerged in the new CAP agreed in June 2013 in particular through the key words 'greening' and 'innovation'. However, the 2013 reform represents a limited move. New instruments have been created - aids for greening, young farmers, less productive areas, coupled support - but the institutional framework in which they are going to act limits its effects. Some positive ideas start to influence public opinion. There is an increasing consciousness that small farmers can be supported through quality policy, horizontal and vertical organization, networking, research and extension. It is true, as it was argued in the present article, that most of these elements maintain a low profile in the CAP. However, they would be helpful to define a new policy agenda, not only for EU farmers but also for the whole Euro-Mediterranean region.

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News from MAI Bari

Journée Mondiale de l'alimentation 2013

Développer des politiques d'inclusion et intégration en agriculture pour les jeunes provenant des pays tiers, créer des synergies entre les professionnels du secteur agricole et alimentaire afin de mettre en œuvre des projets innovants et efficaces pour faire face aux problèmes de l'emploi sont les thèmes débattus à l'occasion de la conférence organisée par le CIHEAM-IAM Bari, le 17 octobre, pour célébrer la Journée Mondiale de l'Alimentation.

Au terme de la rencontre, a eu lieu la cérémonie de remise des diplômes de *Master of Science* à 40 cadres provenant de la région méditerranéenne. Au cours de cette manifestation, ont aussi été décernés les certificats de participation à 31 opérateurs mauriciens qui ont suivi à l'Institut une formation spécialisée destinée aux professionnels du secteur agro-alimentaire. Ce cours s'inscrit dans le cadre des activités du projet « *Faciliter la gestion responsable et efficace de la migration des travailleurs mauriciens en Italie* », cofinancé par la Commission européenne, et réalisé par le Ministère du travail italien en partenariat avec l'Organisation internationale pour les migrations, le Ministère du travail de la République de Maurice et le CIHEAM-IAM Bari. Le projet a pour objectif de prévenir l'émigration irrégulière et renforcer le lien émigration-développement à travers un programme de migration circulaire, contribuant ainsi au développement socio-économique de la République de Maurice, et prévoit la formation de 70 autres opérateurs mauriciens du secteur du tourisme et de la pêche.

A la conférence ont été invités les ambassadeurs et fonctionnaires diplomatiques d'Afrique du Sud, Burkina Faso, Burundi, Ethiopie, Kenya, Lesotho, Libéria, Nigéria, Sénégal, Somalie, Tanzanie, Ouganda, Zambie, Zimbabwe qui souhaitaient rencontrer la communauté des étudiants et mieux connaître les programmes de formation de l'Institut.

La présence de ces délégations a offert l'occasion d'un échange sur les stratégies à entreprendre dans la région sub-saharienne pour soutenir une agriculture durable, faire face aux défis de la sécurité alimentaire et renforcer les relations avec les institutions et les entreprises italiennes. De concert avec les représentants du Ministère des affaires étrangères italien, un projet de document sur les politiques agricoles a aussi été élaboré en vue de la réunion des ministres de l'agriculture à Rome en février 2014.

More information: quagliariello@iamb.it

1st CIGR inter-regional conference on land and water challenges

The vital role of water for any human activity is unquestionable. During the next twenty years, the world population is expected to rise from 6.5 billion to 9 billion and our planet will face growing and unprecedented scarcities of natural resources, first of all water. It will be necessary to double the agricultural production while saving 50% of land and water resources. The challenge of our time is to promote the sustainable use of natural resources, i.e. producing more using fewer resources while respecting the environment for future generations.

In order to take on this challenge, over 150 scientists from Africa, North and South America, Asia and Europe met from 10 to 14 September at the CIHEAM-MAI Bari during the 1st Interregional Conference on Land and Water Challenges, organized by the Institute in collaboration with the International Commission of Agricultural Engineering (CIGR).

The objective of the conference was also to present the latest scientific contributions and outcome on the sustainable management of natural resources with a view to promoting and improving the agricultural sector. In addition, selected papers will be submitted for a Special Issue of a peer review International Journal.

The main themes of the conference were the following:

- Water use performance and water productivity
- Conservation agriculture and water saving
- Sustainability of groundwater exploitation for agriculture
- Decision support systems and modelling tools
- Innovative data-acquisition and information and communication technologies
- Irrigation technologies and management practices for environmental upgrading
- Use of treated and low quality water in agriculture
- Climate change: adaptation and mitigation
- Drought/Flood risk management
- Socio-economic aspects of land and water management
- Policies, governance and institutional development
- Water-food-energy nexus, eco-efficiency and ecological footprint

More information:
www.landandwater2013.iamb.it

News from MAI Chania

Hellenic Innovation Forum

The 1st International Conference 2013, entitled "*Shaping an Innovation Policy for Greece*", organized as a multi-lateral venture, was held on 7-8 October, 2013 at the Eugenides Foundation in Athens (Greece), co-organised by the Bonn-based Institute for the Study of Labor (IZA), the Task Force for Greece, and the Eugenides Foundation, with the support of the German Embassy, the Bodossakis Foundation and Eurobank. Participants from Greece, the Greek diaspora, European countries and the US, included decision-makers, scientists, managers, providers of public funds for innovation policies, potential private investors and industry leaders, banks, venture capitalists and financial intermediaries, entrepreneurs and successful high-tech start-ups. The Director of CIHEAM-MAI Chania Georgios Baourakis participated in the Central Panel for Education/Research/Innovation along with Jack Harding (eSilicon), Dr. Peter Chen (ETH Zurich), Emmanuel Giannelis (Cornell University) and other distinguished academics and entrepreneurs.

The Forum discussed Greece's innovative future, best practices and opportunities for cooperation, identifying ways to take advantage of EU funding. It was designed to facilitate exchange of views and expertise among the participants, by envisioning an ambitious, innovative future for Greece, highlighting assets and obstacles, recommending ways to enhance existing assets, and identifying projects with potential. The policy measures may encompass development of existing research institutes and universities, establishment of new high-quality research institutions, expansion of clusters based on existing specialization within Greece, business environment reform with improved intellectual rights to nurture entry and growth of innovative businesses, financial tools development to support actors in the early stages of the innovation cycle, provision of supporting services, and policy development aimed at exploiting the strengths of the Diaspora.

CAFE` 13

The International Conference "*Competitiveness of agro-food and environmental economy*" (CAFE` 13) was held on November, 7-8, 2013, in the Bucharest Academy of Economic Studies, Romania. The main goal of CAFE` 13 was to debate new ideas contained in scientific research in the field of rural development, agro-food economy, agro-food systems, ecological performance, etc carried out by academics, scientists and professionals. It was organized by the Faculty of Agro-Food and Environmental Economics and the Research Centre of Regional Analysis and Policies of the Bucharest University of Economic Studies (Romania), in partnership with the Institute of Agricultural and Food Economics, National Research Institute (Poland), the British Institute of Technology & e-Commerce (United-Kingdom), the University of Verona (Italy), the Institute of Agricultural Economics (Serbia), the CIHEAM-MAI Chania, the University of Agribusiness and Rural Development Plovdiv (Bulgaria), the University of Agribusiness and Rural Development Ruse (Bulgaria) and the Faculty of Economic Sciences, Petroleum and Gas University of Ploiesti (Romania).

National Agricultural Network

It was established in Greece in the framework of the Programme for Rural Development for 2007-2013 among representative organisations (CIHEAM-MAI Chania is also a Member) from the agricultural and agro-food sectors, Chambers of Commerce, Research Centres, environmental organisations, Local Action Groups, the Ministry of Rural Development and Food, and the Ministry for the Environment, Energy and Climate Change, which are responsible for the management and application of the Programme for Rural Development. The main objectives of the Network are to:

- interconnect members ;
- identify and analyse good practices for rural development ;
- exchange experience and expertise in rural development ;
- provide technical assistance for inter-territorial projects and transnational cooperation ;
- collaborate with the European Network for Rural Development and the National Rural Networks of other Member States.

The Network aims to organize seminars, conferences and thematic workshops, publish material on Rural Development, form a database for collection and promotion of good practices, and create a bilingual website using electronic networking tools.

The 2nd Development Conference on "*The Common Agricultural Policy 2014-2020 and the formulation of the national strategy*", organised by the National Agricultural Network, was held on Tuesday 15 October 2013, in Athens with the EU Commissioner of Agriculture and Rural Development, Dr. Dacian Ciolos, the Greek Minister of Rural Development and Food, Prof. Athanasios Tsiftaris and the Deputy Minister Mr. Maximus Charakopoulos. This was the first single consultation organised to formulate national strategy throughout the CAP, namely the first and second pillars. The European Commission positioned itself in the opportunities and challenges for agriculture and rural areas under the new CFP.

The Greek Minister presented policy directions for shaping the vision, objectives and strategy for Greek agriculture and rural development for 2020 and the means to achieve these objectives, utilizing the most effective opportunities and funds available in Greece. The shape of the Operational Programme for Rural Development, under the NSRF 2014-2020 and the regions' role in rural development, was also debated.

Rural development for 2014-2020 was analyzed by the European Commission representative Leo Maier. The NSRF 2014-2020 EFSAAP was mentioned by the Head of the Ministry of Development & Competitiveness and Mr. Firbas, concerning human resources in agriculture, strengthening of entrepreneurship and competitiveness, and adapting agriculture to climate change, noting agriculture issues to be discussed during the Greek Presidency and priorities at national and European levels.

News from MAI Montpellier

Séminaire international sur le développement rural

Dans le cadre de la 10^{ème} réunion des Ministres de l'agriculture de l'alimentation et de la pêche des Etats membres du CIHEAM, qui aura lieu à Alger le 6 février 2014, le CIHEAM-IAM Montpellier a été chargé d'organiser un séminaire technique. Celui-ci se tiendra les 4 et 5 février 2014, également dans la capitale algérienne, et portera sur « *le développement rural en Méditerranée* ». Ce séminaire se propose d'examiner les dynamiques nouvelles à l'œuvre dans les territoires ruraux méditerranéens et les fonctions économiques, sociales et environnementales renouvelées de ces espaces que les politiques publiques ont parfois eu tendance à minorer au cours des dernières décennies.

Les questions principales qui serviront de fil conducteur à ce séminaire : Comment aborder le développement rural de façon innovante et efficiente en tirant parti des expériences passées ? Dans le contexte des changements en cours, quelles erreurs éviter et où investir en priorité ? Quelles sources d'innovations permettent de faire la différence aujourd'hui pour des stratégies efficaces de développement ? Différentes dimensions devront être mobilisées notamment : les progrès scientifiques et techniques, les sciences humaines et sociales, les systèmes agricoles innovants et les diagnostics territoriaux.

Quatre grands thèmes, qui concerne les territoires ruraux, ont été choisis et validés par des réunions préparatoires avec les autorités algériennes :

- les territoires ruraux face au défi de l'attractivité et de la compétitivité ;
- la diversité des territoires, diversité des agricultures. Produits de terroir et de promotion des signes de qualité (ces deux thèmes composent la session 1 de ce séminaire) ;
- La durabilité des ressources et appui aux agricultures familiales en Méditerranée (session 2) ;
- Le renforcement de la capacité des acteurs (session 3).

Chaque thème sera discuté par une trentaine d'experts des pays membres sur la base d'une analyse générale à l'échelle méditerranéenne et d'analyses de cas. Ce séminaire technique international aura à charge de proposer des recommandations qui devraient, après adoption, figurer en annexe de la déclaration officielle de la réunion des Ministres.

L'objectif est de soutenir, au niveau national, les stratégies de développement rural dans les différents pays du pourtour méditerranéen et, également, de donner des pistes sur les modalités du partenariat et de la coopération dans la région.

Plus d'informations: tonnu@iamm.fr

ENPARD / Formation continue

Dans le cadre de l'initiative ENPARD (*European Neighbourhood Programme for Agriculture and Rural Development*) le CIHEAM-IAM Montpellier organisera, fin janvier 2014, (conformément au volet « Liban » de ce programme) trois sessions de formation professionnelles destinées aux agents du Ministère de l'agriculture et de la société civile au Liban. Ces formations, qui rentrent dans le cadre de renforcement des capacités techniques et institutionnelles des différents acteurs des zones rurales, auront pour objectifs d'apporter des connaissances et des méthodes sur les outils techniques adaptés aux problématiques de trois enjeux stratégiques :

- le diagnostic rapide de territoire : il s'agit de maîtriser la technique dite du « cadre logique » pour synthétiser les informations collectées lors du diagnostic dans la construction d'une stratégie de développement agricole ou local, de façon cohérente et dans un format reconnu par les bailleurs de fonds ;
- l'optimisation et amélioration de la performance des exploitations agricoles : l'objectif est d'identifier et d'analyser les leviers agronomiques, technico-économiques et environnementaux qui expliquent la faiblesse et la variabilité de la production agricole ;
- l'organisation des filières agroalimentaires et construction de stratégies de clusters : il s'agit ici de faire comprendre les mécanismes d'interdépendance, les rapports de force, les conflits et les enjeux entre les agents économiques d'une filière, ainsi que la création de valeur au long de la chaîne d'approvisionnement.

Les participants de ces trois formations seront plus tard sollicités dans les groupes de travail pour élaborer, dans une approche participative, la nouvelle stratégie agricole et rurale au Liban 2014-2020.

Dans le cadre du même programme ENPARD, mais cette fois dans son volet national pour l'Egypte, un programme détaillé de formation professionnelle est établi avec les autorités compétentes du Caire. Ces formations sont programmées pour le premier trimestre 2014. Quatre thèmes prioritaires ont été identifiés :

- les méthodes et techniques de suivi et évaluation des projets ;
- les filières et chaînes de valeur : quelle organisation et intérêt pour le développement agricole et rural ?
- les stratégies de développement local et technique d'élaboration et de suivi des projets ;
- les méthodes d'élaboration et de mise en œuvre d'un projet de tourisme rural.

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News from MAI Zaragoza

Dewfora project close

The *Dewfora* project (Early warning and forecasting systems to predict climate related drought vulnerability and risks in Africa), financed by the European Union's FP7 is to close on 31st December 2013 after 3 years in operation. The project aimed at reducing vulnerability and strengthening preparedness and adaptation to contribute to increased resilience and improved effectiveness of drought mitigation measures. The Consortium of partners is composed of 18 institutions from 13 European and African countries.

During the last 3 years, *Dewfora* has yielded technical and scientific advances in drought forecasting in Africa, and has proposed a framework for the development of drought early warning systems adapted to the continent's physical and socio-economic conditions, integrating forecasts, drought indicators and monitoring, impacts and vulnerability assessment and operational planning. Furthermore, different case studies have been developed in four river basins (Limpopo, Niger, Nile, and Oum Er Rbia in Morocco) to test different elements of the drought early warning tools provided by the project on the ground, and a continental drought forecasting system prototype has been produced. These results were presented and discussed with over 200 scientists and stakeholders from all African countries during the 14th Waternet/WARSFA/GWP-SA Symposium, held in Dar es Salaam (Tanzania) from 30 October to 1 November 2013.

CIHEAM-MAI Zaragoza has been the partner in charge of the organisation of one of the project courses, dealing with "Drought forecasting and its use in informed decision making" (23-27 September 2013, Zaragoza, Spain), where the latest advances obtained by the project on drought forecasting were presented as well as their possible applications. CIHEAM-MAI Zaragoza is also developing an e-learning course on Drought early warning and forecasting systems in Africa, based on the three courses organised within the *Dewfora* framework. The course will be available from 31st December 2013 on our website.

More information on www.dewfora.net

EDAMUS Master

CIHEAM-MAI Zaragoza has received the first cohort of 12 students of the International Erasmus Mundus Master "EDAMUS" in Sustainable Management of Food Quality. The students are from a wide range of countries: Algeria, Egypt, Ethiopia, Germany, Guatemala, India, Italy, Moldavia, Peru, Rwanda and Serbia. In February a second group of 13 students will arrive, also representing a substantial number of countries.

EDAMUS is a 2 year and 120 ECTS Master of Science Programme, aiming at developing internationally trained experts in the management of food quality, in the interface between technical, economic and social policies. The programme is coordinated by the University of Montpellier 1 (France), in collaboration with an international partnership: Basilicata University (Italy), 3 CIHEAM's Institutes (Chania, Montpellier and Zaragoza) and University Mentouri of Constantine (Algeria). The University of Tsukuba (Japan), University of Sherbrooke (Canada), CIHEAM-MAI Bari and Institut Agronomique Veterinaire Hassan II (Morocco) are associated members.

CIHEAM-MAI Zaragoza, together with UNIBAS and UM1, is one of the 3 degree-awarding-institutions in the EDAMUS Consortium, and within the MSc programme offers a 30 ECTS specialization on Marketing and economics in food quality, as well as organisational support for students who choose to do their internship and Master thesis in Spanish organisations.

More information on www.master-edamus.eu

New MSc programmes websites

Distinctive web pages for the MSc courses offered at CIHEAM-MAI Zaragoza have been developed gathering information which was either incomplete or scattered from different sites to provide complete academic and practical information for students. They all have been established following the guidelines drawn up by the Spanish Agency responsible for accreditation of new degrees in accordance to the European Network of Quality Agencies.

For each Master of Science they present detailed information on: General interest of the programme; Characteristics and organization; Competences of the degree; Access, admission and scholarships; Diplomas; Quality assurance systems; Syllabus and study guide (competences, learning outcomes, contents, learning activities, assessment methods, lecturers, etc.); and Practical information for students. The webpages in English (there are links to French and Spanish) are:

- <http://masters.iamz.ciheam.org/en/animalnutrition>
- <http://masters.iamz.ciheam.org/en/integratedplanning>
- <http://masters.iamz.ciheam.org/en/plantbreeding>

The web page for the Agro-food Marketing course should be finished in the next few weeks. As for the 4 Masters co-organized by CIHEAM-MAI Zaragoza with Spanish Universities outside Zaragoza, the web pages are the responsibility of the partner institutions.

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2007

1. Water Resources and Agriculture
2. Identity and Quality of Mediterranean Products
3. Zoonoses and Emerging Diseases

2008

4. Aquaculture Sector
5. Sociopolitical Impacts of the Rising Food Prices
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28. Land Management
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Communication Policy

The Watch Letter is dispatched electronically to more than **20,000 recipients** in the Euro-Mediterranean World (decision makers, ministers, journalists, researchers, students, documentation and research centres, universities, etc.).

Constant efforts are made to ensure a wide variety of contributor profiles in both geographic and professional terms. In the 27 issues published so far, we have published **162 articles** involving **237 authors**.

Contributing to the Watch Letter

We invite persons who have relevant expertise in Agriculture, Food and Rural Development Areas (teachers, researchers, students, decision makers, etc.) and wish to contribute to the Watch Letter to contact us at the following email: abis@ciheam.org





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