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PERCEPTIONS OF EU AGRICULTURAL
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IN THE SOUTHERN AND EASTERN
MEDITERRANEAN
BY EUROPEAN STAKEHOLDERS

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ABSTRACT

Within MEDRESET Work Package 5, this report analyses the views of EU stakeholders on EU policies relating to agriculture and rural development in the Southern and Eastern Mediterranean (SEM) region. First, it outlines the structure of the EU agricultural system and the growing importance of global value chains and associated European export interests. Secondly, it analyses trade interests of the EU in the SEM, as this is crucial for an understanding of what constitutes a stakeholder of EU SEM policies and what such stakeholders' motivations might be. Thirdly, it gives an overview of EU policies and projects in the SEM. Fourthly, it outlines the stakeholder universe of such EU programmes in the SEM (i.e., farmer associations, lobby groups, research centres, NGOs and government bodies), and how they influence the EU policy process about the region. Fifthly and finally, it analyses the European stakeholders' views on EU policies on agriculture and rural development in the SEM region, drawing on the interview consultation carried out between January and February 2018 as well as the publications of the respective organizations.

INTRODUCTION

People in rural areas are nowadays only a minority of the population in Europe (28 per cent) and agriculture is not as dominant in EU policies as before, when it accounted for 70 per cent of the EU budget in 1985. In 2018 direct aid to farmers and market-related expenditure accounted for 26 per cent of its budget and another 9 per cent was allocated for rural development.²

However, agriculture still looms large in policies and politics of the EU. The Southern and Eastern Mediterranean (SEM) relates to EU agriculture in two major ways. On the one hand it is the world's largest grain importer and a very substantial one for meat and dairy products. For many countries in the north of the EU it is a major market. On the other hand the SEM is also an exporter of fruit and vegetables, such as citrus, strawberries and olive oil. For many countries in the south of the EU it is a competitor, either within the EU itself or in third-party markets such as the Gulf countries.

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² European Commission website: *The Common Agricultural Policy at a Glance*, https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cap-glance_en.

Agriculture plays an important role in the engagement of the EU with the SEM. This does not only apply to trade policies. The Euro-Mediterranean Partnership (EMP) process and related programme assistance such as the European Neighbourhood Instrument (ENI) and the European Neighbouring Programme for Agriculture and Rural Development (ENPARD) go beyond the narrow focus on agriculture and include water and rural development (Chaaban et al. 2017). The EU's policy has evolved from a protectionist trade stance to a more comprehensive developmental perspective. Export subsidies have been slashed from 10 billion euro in the early 1980s to only 147 million euro in 2012 (European Commission 2015b: 58–9). EU market access for developing countries has increased, also via preferential trade agreements.

Work Package 5 of the MEDRESET project analyses in recursive multi-stakeholder consultations how stakeholders in the SEM and the EU perceive such EU policies. To this end semi-structured interviews have been conducted in Morocco, Tunisia and Lebanon (Egypt did not grant research permission) with representatives of farmer associations, NGOs and ministries.

In this paper we analyse the views of EU stakeholders on EU policies relating to agriculture and rural development in the SEM. First we outline the structure of the EU agricultural system and the growing importance of global value chains and associated European export interests. Secondly, we analyse trade interests of the EU in the SEM, as this is crucial for an understanding of what constitutes a stakeholder of EU SEM policies and what such stakeholders' motivations might be. Thirdly, we give an overview of EU policies and projects in the SEM. Fourthly, we outline the stakeholder universe of such EU programmes in the SEM (i.e., farmer associations, lobby groups, research centres, NGOs and government bodies), and how they influence the EU policy process about the region. Fifthly and finally, we take a detailed look at the stakeholders that have been identified and interviewed for the purpose of this paper. Their views on EU policies on agriculture and rural development in the SEM are analysed based on these interviews and publications of the respective organizations.

1. STRUCTURE OF THE EU AGRICULTURAL SYSTEM

1.1. FOOD REGIMES AND TRADE LIBERALIZATION

The EU's agricultural system has evolved from a predominantly national system of regulation with a protectionist stance in the post-war decades, to a more open system that aims at integration of expanding global value chains (McMichael 2009). Agriculture was not part of the General Agreement on Tariffs and Trade of the post-war decades. It was only included in the Uruguay round (1986–94) that led to the establishment of the World Trade Organization in 1995. Since then there has been a reduction of tariffs and export subsidies, while maintaining substantial farm support in the form of direct financial aid to farmers. In the US this process dates back to the late 1990s, and in the EU to the 2003 reform of the Common Agricultural Policy (CAP) (Winders 2011). The CAP of the EU has undergone several metamorphoses since it was established in 1962. It has been widely criticized for distorting world agricultural prices and raising entry prices for developing countries (Andreosso-O'Callaghan 2003). Since the CAP reform of 2003 such price interference has been reduced. EU export subsidies have been slashed from 10 billion euro in the early 1980s to only 147 million euro in 2012 (European Commission 2015b: 58–9). Yet one still cannot speak of a level playing field because of the

substantial direct aid that has taken the place of indirect support via market interventions.

The US and the EU have pushed for increased agricultural trade liberalization, especially for grains, meat and dairy products. Emerging agro-exporters of the Cairns group such as Brazil, Thailand, South Africa and Australia have complained of unfair bias, as tariffs were reduced but significant farm support was maintained, representing a switch from indirect support to direct financial aid. EU market access for developing countries has increased via preferential trade agreements, yet their competitive position has been affected by such measures. Meanwhile China and India have been concerned about self-sufficiency for strategic reasons and out of concern for their large populations of smallholder farmers. Developing countries have remained on the margins of these trade developments, with limited institutional capabilities to engage with the global trade regime (Weis 2007).

The EU is the world's foremost trader in agricultural goods, in terms of both exports and imports (European Commission 2016). Exports of wine, cereals, meat, olive oil, fruit, vegetables and dairy products are a main driver of European agriculture. Beverages and products of the food industry such as pasta, infant food and other processed goods generate one third of the agri-food export value. Agri-food accounts for more than 7 per cent of all goods exported from the EU (European Commission 2016: 1), reaching 137.9 billion euro in 2017 (European Commission 2018a). However, the main trade flows, totalling 332 billion US dollars in exports in 2016, are within the EU itself. The Netherlands (57.7 billion), Germany (47.1 billion), Spain (37.8 billion), France (37.4 billion) and Italy (26.4 billion) are the EU's top exporters of agri-food, but of those only Italy has a non-EU market (the US) among its top five export markets (Chatham House 2018).

1.2. TRANSFORMATION OF AGRICULTURAL PRODUCTION AND INTRA-EU DIFFERENCES

The number of people involved in this agri-food production and trade is not as large as it used to be. Like elsewhere in the world there has been rural flight in Europe since the post-war decades. The number of farmers has decreased, while the land size of remaining farms has increased (European Commission 2013). The amount of cultivated land has stayed stable. Despite their relative decline, small farmers still constitute a sizable portion of the population in many EU countries, for example in Rumania and Bulgaria which became EU members in 2007. On the one hand small farmers are threatened by socio-economic marginalization, while on the other hand they play an important role in rural areas as they contribute to employment, landscaping and maintenance of the social fabric (European Commission 2011).

There are 10.8 million farms across the EU, utilizing 174.4 million hectares of land, which is equivalent to 40 per cent of the total land area of the EU-28 (Eurostat 2017). The EU farm structure varies: 4.9 million very small farms that are less than two hectares in size use only 2.5 per cent of the total cultivated land area (Eurostat 2015). A significant percentage of these farms are semi-subsistence farms that self-consume more than half of their output. In comparison, large farms with more than 100 hectares constitute only 3.1 per cent of all farms, but use 50.2 per cent of the total utilized agricultural area. This dichotomy also manifests economically: almost half of the farms (4.4 million holdings, 40.2 per cent of the total) have a standard output below 2,000 euro.

There is a difference between farming structures in the north, south and east of the EU. Northern EU countries have larger farms than southern and eastern ones (with the exception of the Czech Republic). A majority of farms are larger than 20 hectares in Belgium (54.2 per cent), Germany (55 per cent), Denmark (55.5 per cent), France (57.2 per cent), Ireland (57.3 per cent), the United Kingdom (61.3 per cent), Finland (62.4 per cent) and Luxembourg (66.3 per cent). In contrast, small farms represent a significant part of agricultural holdings in Italy (51 per cent), Poland (54 per cent) and Romania (74 per cent) (Eurostat 2015). North and south also differ in terms of cultivated crops. In the north, cereals, dairy, eggs and meat are the main export commodities. In the south, fruits, vegetables, oil and wine are the main drivers of agricultural output. In the east, wheat, maize, poultry and apples together with nuts represent the majority of exports.

1.3. EU AGRICULTURE AND THE ROLE OF RURAL DEVELOPMENT

The overall influence of farmers in increasingly globalized value chains has waned at the expense of a few large transnational corporations that dominate input provision of seeds, fertilizers and pesticides as well as food processing and distribution networks. The value chains of food production and processing account for 7.5 per cent of employment and 3.7 per cent of total value added in the EU. In 2013, there were 10.8 million agricultural holdings in the EU and around 22 million people working regularly in farming (European Commission 2015a, Eurostat 2015). If the food processing and distribution sector is added, this employment figure grows to roughly 44 million people.

Over one quarter (28 per cent) of the EU-28 population lives in rural areas (Eurostat 2017). Over 20 per cent of them are at risk of poverty or social exclusion, on average. In Mediterranean countries that have particularly suffered from the global financial crisis this ratio is higher, such as in Greece (38 per cent), Spain (32 per cent) and Italy (25 per cent).

Rural development contributes to the prosperity of farmers, who manage nearly half of the EU's land area, but also benefits industries and consumers. It also fosters other sectors that might not be directly related to agriculture, such as tourism (Udovč and Perpar 2007). Lively rural communities are a main focus of the CAP, beside raising farm competitiveness and fostering environmental sustainability (European Commission 2013: 2).

In recent years, global agricultural markets have faced increasing volatility, directly impacting stakeholders of food value chains within the EU and beyond it (Ferenczi 2016). As a remedy the EU fosters cooperation with trading partners beyond its borders to ensure compliance with EU standards and food safety regulations (Van Berkum 2014). The EU's domestic rural development policy has been conceived to help rural areas overcome a broad scope of economic, social and environmental challenges. Rural development policy complements the CAP's system of direct payments to farmers, which is one of its two dimensions alongside policies.³

³ See the European Environment Agency website: *Agriculture*, updated 30 July 2018. <https://www.eea.europa.eu/themes/agriculture/intro>.

In sum, the EU agricultural system has moved from a national protectionist stance to a more open system that seeks to integrate international value chains, also beyond the EU's borders. It is driven by interest of large companies in procurement, processing and distribution. The role of small farmers has diminished over time, not only within the value chains, but also within the production sector itself. However, the EU recognizes the important role of small farmers in terms of livelihoods, social cohesion and landscaping, especially in some eastern and southern member states, and seeks to enhance their economic opportunities via rural development policies, enhanced competitiveness and market access. In 1985 the European Economic Community used the Integrated Mediterranean Programmes to prepare farmers in Greece, Southern Italy and France for the EU accession of Spain and Portugal. The Agenda 2000 reforms of the CAP elevated rural development and made it a second pillar alongside production support. The EU's LEADER programmes have supported projects for the revitalization of rural areas and job creation that have been initiated at the local level since 1991. Similar programmes for Central and Eastern Europe have been provided via the Special Accession Programme for Agricultural and Rural Development until 2007 and afterwards via the Instrument for Pre-Accession Assistance (Chaaban et al. 2017: 16).

2. EUROPEAN TRADE INTERESTS IN THE SOUTHERN AND EASTERN MEDITERRANEAN

The SEM is an important market for the EU countries when it comes to cereals, meat and dairy products, and a competitor when it comes to some fruit and vegetables. The EU's agricultural exports to the Middle East and North Africa (MENA)⁴ increased from 7.5 billion US dollars in 2000 to 17.4 billion in 2016. Most of this was cereals, followed by dairy, eggs, honey, horticulture and live animals (see Table 1). The MENA's share was equivalent to 5.2 per cent of the EU's total agricultural trade of 332 billion US dollars – a share that was not insignificant, but not very high either. Beside some SEM countries (Egypt, Algeria and Morocco), Saudi Arabia and the UAE in the Gulf figured prominently. These last two are also important markets for agricultural exporters in SEM countries, especially for Turkey and Morocco. Most of the total agricultural trade of EU countries was intra-European.

Table 1 | EU28 agricultural exports to MENA (total value 17.4 billion USD): Top 5 categories (2016)

Top 5 commodities		Top 5 bilateral trade		Top 5 exporters		Top 5 importers	
Cereals	6	France to Algeria	1.1	France	3.4	Egypt	2.4
Dairy, eggs and honey	3	France to Morocco	0.782	Netherlands	2.1	Algeria	2.4
Horticulture	1.7	Romania to Jordan	0.634	Romania	1.9	Saudi Arabia	2.1
Live animals	1.2	Romania to Egypt	0.529	Spain	1.9	Morocco	2
Other products	1.2	Germany to Saudi Arabia	0.449	Germany	1.8	UAE	1.6

Source: Chatham House (2018).

4 Here: Arab countries excluding Sudan and Mauritania, plus Iran and Israel, but excluding Turkey.

The MENA only exported agricultural goods worth 7 billion US dollars to the EU-28 in 2016, which was equivalent to 26.2 per cent of its 26.7 billion US dollars total agricultural exports. This number has doubled since 2000, when it stood at 3.5 billion US dollars, but did not grow as much as the even stronger rise of EU exports. The MENA runs a large agricultural trade deficit with the EU, and the EU's share in its agricultural trade is much more important than the other way around. More than half of its exports to the EU are horticultural products. Morocco is by far the most important exporter, followed by Egypt and Israel. On the EU side the main importers were mainly Mediterranean countries followed by the Netherlands and Germany (see Table 2).

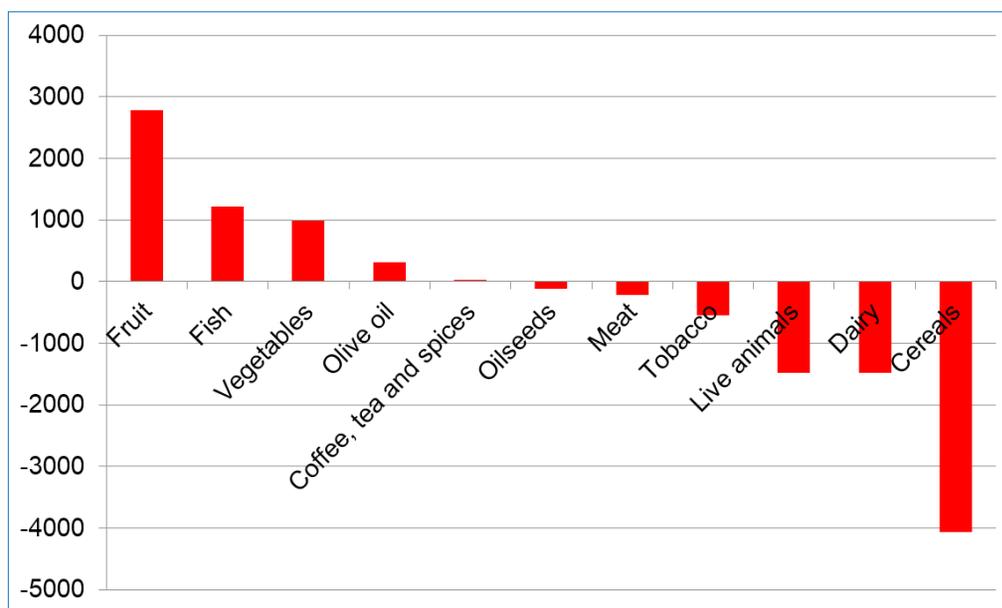
Table 2 | EU28 agricultural imports from MENA (total value 7 billion USD): Top 5 categories (2016)

Top 5 commodities		Top 5 bilateral trade		Top 5 exporters		Top 5 importers	
Horticulture	3.8	Morocco to Spain	1.2	Morocco	3.1	Spain	1.6
Fish	1.1	Morocco to France	0.874	Egypt	1.2	France	1.3
Other products	0.768	Tunisia to Italy	0.316	Israel	1	Italy	1.1
Oilseeds	0.531	Egypt to Italy	0.296	Tunisia	0.675	Netherlands	0.691
Stimulants, tobacco, spices	0.212	Morocco to Netherlands	0.267	Iran	0.501	Germany	0.690

Source: Chatham House (2018).

A more granular look at the SEM that this time also includes Turkey reveals some EU trade patterns that are of particular relevance for EU stakeholders. Whereas the net trade in cereals, dairy, mainly bovine live animals and tobacco is positive, the EU has a trade deficit with the SEM in fruit, fish, vegetables and olive oil (see Figure 1).

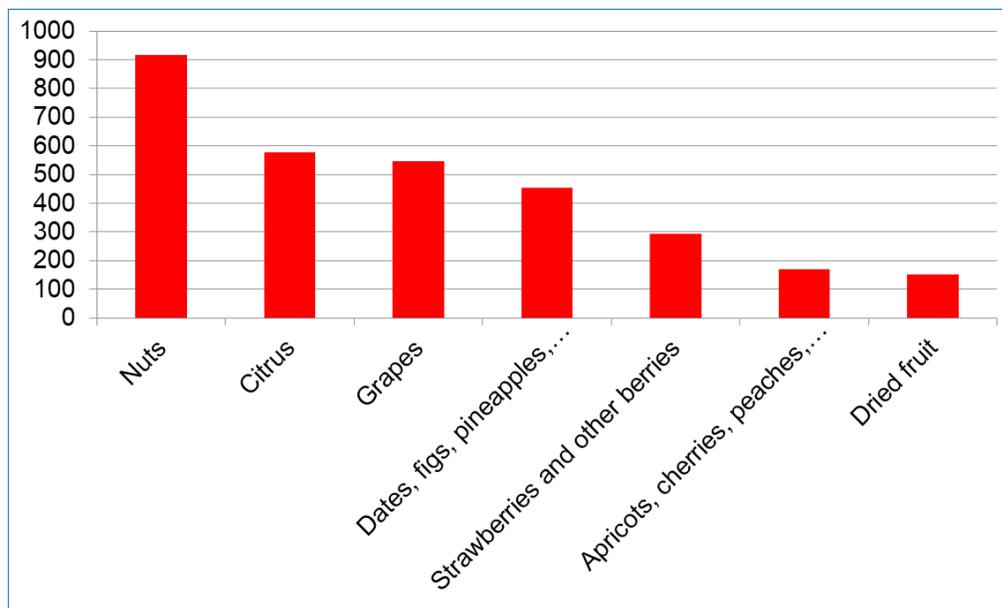
Figure 1 | Agricultural net trade of SEM with EU28, 2016, in million USD



Source: International Trade Center (2018).

Fruit is an area where the SEM has a substantial trade surplus with the EU. It exports 3.36 billion US dollars, mostly from Turkey (2 billion US dollars) and Morocco (553 million US dollars) while importing only 579 million US dollars from the EU. Most of these EU fruit exports go to Egypt (290 million US dollars). Turkey almost entirely accounts for the exports of nuts to the EU – almost 1 billion US dollars, most of it hazelnuts (see Figure 2). Citrus exports mainly come from Morocco (197 million US dollars), Turkey (160 million), Israel (110 million) and Egypt (100 million). SEM exports of strawberries and other berries to the EU are dominated by Morocco (170 million US dollars), followed by Egypt (52 million) and Turkey (46 million). The main importers on the EU side are France, Italy, Germany, the Netherlands, the UK and Spain.

Figure 2 | Fruit exports from SEM to EU-28, 2016, in million USD



Source: International Trade Center (2018).

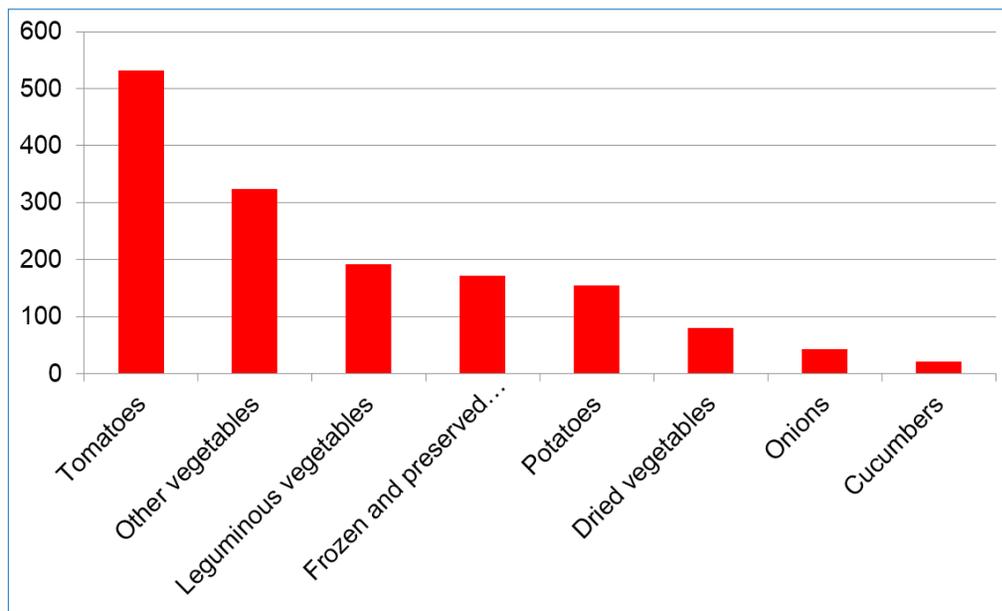
The SEM exports 1.65 billion US dollars of *vegetables* to the EU, mostly from Morocco (776 million), Turkey (333 million), Egypt (286 million) and Israel (201 million). A large portion of that is tomatoes, other vegetables, leguminous vegetables and potatoes (see Figure 3). The main EU trading partners in this area are France, Spain, Germany, Italy, the Netherlands, the UK and Belgium. In turn the SEM's main vegetable imports by far are potatoes (339 million US dollars) and dried leguminous vegetables (204 million US dollars).

In *oilseeds* the SEM has substantial exports (Egypt, Israel, Turkey, Morocco), but overall an agricultural trade deficit with the EU. *Fish* is another area where the SEM runs an agricultural trade surplus with the EU. Exports of 1.54 billion US dollars are coming mainly from Morocco (892 million), Turkey (508 million) Tunisia (110 million). The main importers of SEM fish in the EU are Spain (644 million US dollars), followed by Italy (317 million) and the Netherlands (243 million).

Cereals, dairy products and live animals are areas where the SEM runs major agricultural trade deficits with the EU. Hence there are considerable export interests in the north of the EU, such as France, Ireland, UK, the Czech Republic and Germany. *The SEM is one of the largest*

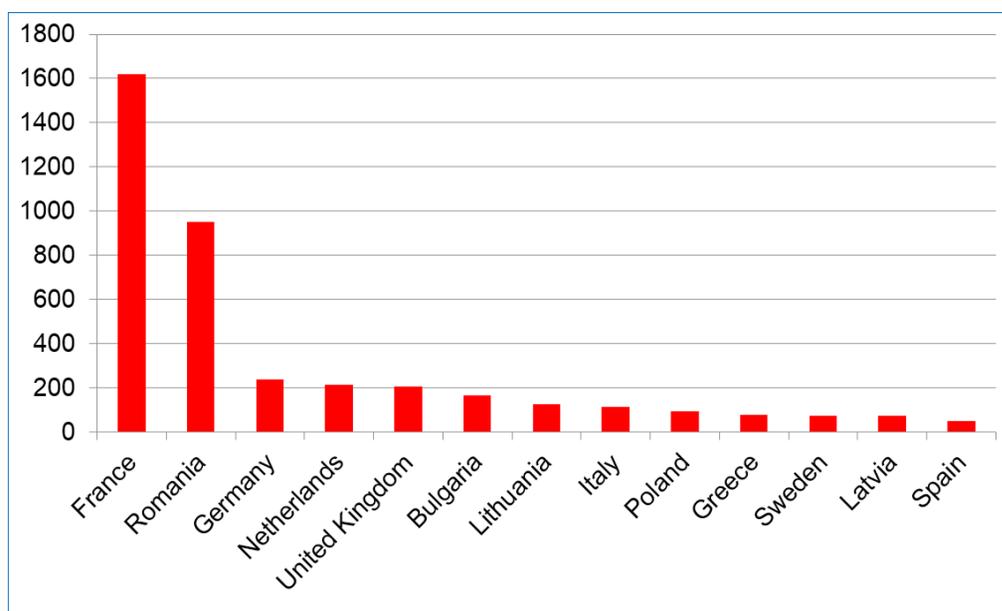
cereal importers of the world. The EU plays a major role in this trade. It exported 4.12 billion US dollars in cereals to the SEM in 2016, mostly wheat (3.15 billion), followed by barley (513 million), corn (365 million) and rice (80 million). The bulk of this export trade comes from France and Romania. Eastern European countries such as Lithuania and Latvia also have a considerable share, especially compared to their landmass and population size (see Figure 4).

Figure 3 | Vegetables exports from SEM to EU-28, 2016, in million USD



Source: International Trade Center (2018).

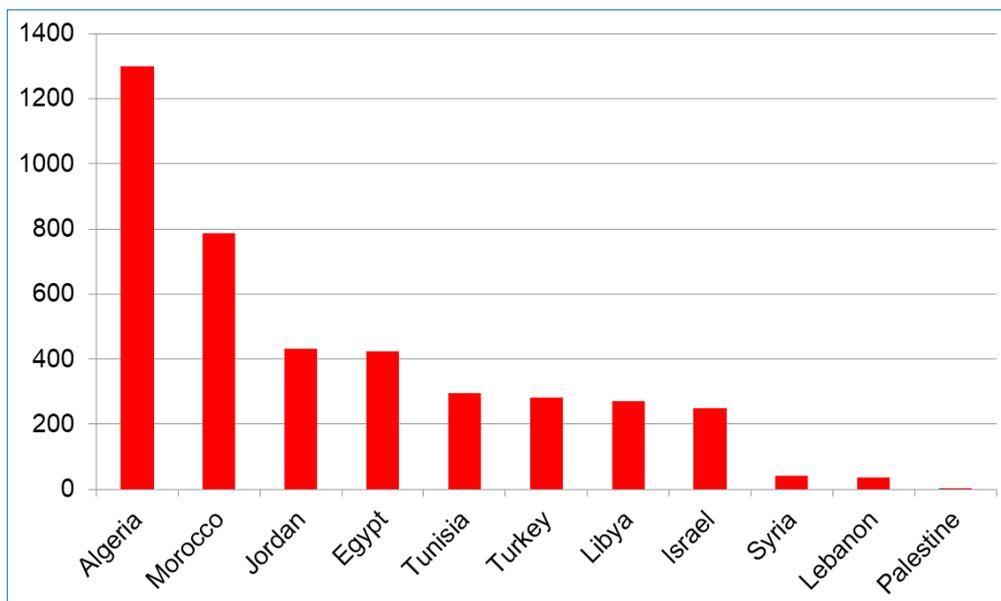
Figure 4 | EU exporters of cereals to SEM, 2016, in million USD



Source: International Trade Center (2018).

The largest SEM importer of European *cereals* is Algeria, followed by Morocco and Jordan. Egypt does not play such a big role, although it is the largest wheat importer of the world. Its most important supplier in recent years has become Russia, which supplies it with cheaper, but lower quality wheat (see Figure 5).

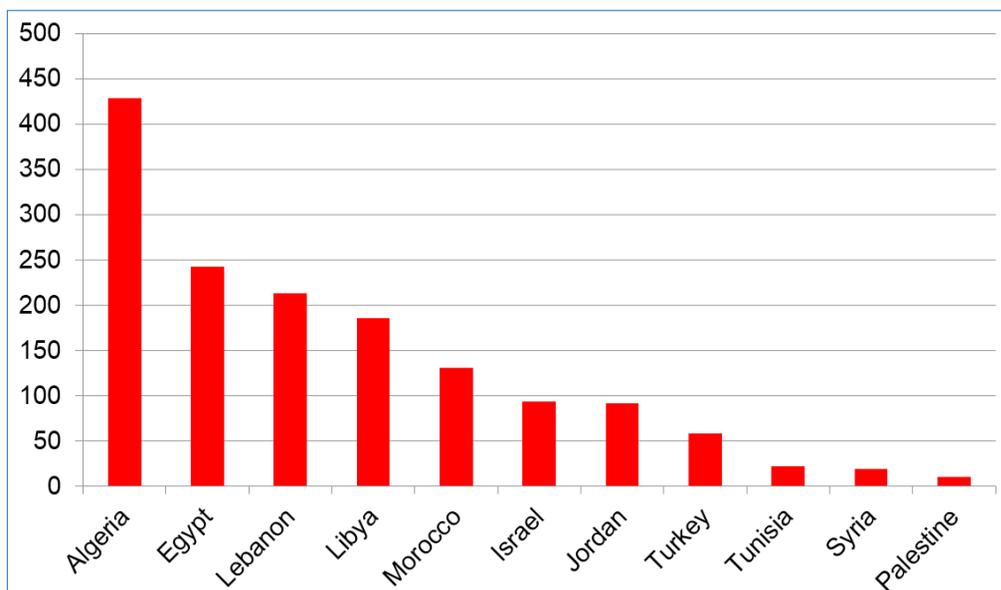
Figure 5 | SEM importers of EU cereals, 2016, in million USD



Source: International Trade Center (2018).

Finally, Algeria and Egypt are by far the largest importers of *dairy products and eggs* in the SEM, followed by Lebanon and Libya (see Figure 6).

Figure 6 | SEM imports of dairy, eggs and honey from EU-28, 2016, in million USD



Source: International Trade Center (2018).

3. EU POLICIES ON AGRICULTURE AND RURAL DEVELOPMENT IN THE SEM

Agricultural trade and rural development are not only major pillars of the CAP and the EU's domestic agenda, both also inform its cooperation with SEM countries as we have outlined in the MEDRESET Methodology and Concept Paper (Chaaban et al. 2017), on which this subsection is partly based.

Trade liberalization is a key aspect of the Barcelona Process. The EMP aims at establishing a Euro-Mediterranean Free Trade Area (EMFTA). With the development of the European Neighbourhood Policy (ENP) in the wake of the EU enlargement of 2004 and the establishment of the Union for the Mediterranean (UfM) in 2008, such efforts have intensified. In 2011 the Council authorized the Commission to enter negotiations with Egypt, Jordan, Morocco and Tunisia about Deep and Comprehensive Free Trade Areas that would go beyond mere trade liberalization and would also cover regulatory issues relevant to trade such as investment protection and public procurement.

Currently countries of the EMP have duty-free access to the EU for manufactured goods, but only preferential treatment for their exports of agricultural, processed agricultural and fisheries products. More than 80 per cent of their agricultural exports enjoy duty reduction and even exemption in some cases. In turn about a third of EU agricultural exports enjoy preferential treatment in EMP countries.

Institutional adaptation to EU rules, such as the CAP and food safety standards, is a crucial aspect of this process. South-South trade liberalization is also part of the process towards the EMFTA and is encouraged by the EU, such as the Agadir Economic Agreement of 2004 between Morocco, Tunisia, Jordan and Egypt or bilateral free trade agreements between Turkey and several MENA states (Compés López et al. 2013: 6).

As seen in Section 2, the SEM is not only one of the largest grain importers in the world, it is also a major producer in other areas such as fruit and vegetables and is among the top ten agricultural producers globally in value terms. Turkey, Egypt, Morocco, Algeria and Syria account for more than 90 per cent of SEM agricultural production, and Turkey alone for 39 per cent (Belghazi 2013). While farmers in Mediterranean countries of the EU (Spain, Portugal, Italy, Greece, France) are worried about competition in fruit, vegetables, olive oil and wine, farmers in the South are worried about the influx of cheap grain and meat products from the EU in protected domestic markets, and fear that their remunerative export business in fruit and vegetables could be hampered by EU regulations and food safety standards.

Competitiveness has moved from cost competitiveness on a firm level to effectiveness of transboundary value chains, which is necessary to assure that exportable products are competitive in terms of quality (SUSTAINMED 2013). Apart from Turkey, the EU has a surplus in the agricultural trade balance with all EMP countries and this surplus has increased over the past decade (see Section 2). This signals increased EU competitiveness and the need for adjustment assistance to southern EMP countries. There are also concerns about the non-inclusion of environmental issues and labour rights and loss of culinary traditions, such as the Mediterranean diet (Compés López et al. 2013: 11, CIHEAM 2012).

The EU offers financial assistance to countries within the European Neighbourhood, an assistance that comes with conditionality tied to government and economic reform. To this end the EU and the target country usually agree on an Action Plan. The MEDA I and II programmes lasted from 1995–1999 and 2000–2006. They were followed by the European Neighbourhood and Partnership Instrument (ENPI) that was in force between 2007 and 2013 with a budget of 11.2 billion euro. It was replaced by the European Neighbourhood Instrument (ENI) that came into force in 2014 with a budget of 15.4 billion euro over the period 2014–2020. Funds are managed and allocated by the DG Development and Cooperation – EuropeAid. Additionally there are the lending activities of the European Investment Bank in the fields of agriculture, food and rural development. Morocco has been the largest beneficiary of funding under the European Neighbourhood Policy, with 654 million euro (in 2007–2010) and 580 million euros that were earmarked for the period 2011 to 2013 (Compés López et al. 2013: 16).

Countries that are part of the current EU enlargement, such as Turkey, are not part of the ENP and its assistance programme. Turkey applied for EU accession in 1987, entered a customs union in 1995 and became a candidate for accession in 1999, which has been negotiated inconclusively since 2005. As such it has access to the Instrument for Pre-Accession Assistance, its sub-programme for rural development (IPARD) and the Instrument for Structural Policies for Pre-Accession. It can also participate in the FP European innovation and research funding and the Agricultural Research for Development (ERA-ARD) on equal footing with European partners.

Trade agreements and development cooperation do not happen in a socio-economic and political vacuum. In the wake of the Arab Spring the EU has seen the need to undertake a thorough and deep revision of the ENP that goes beyond trade issues and focuses on the “stabilisation of the region, in political, economic, and security related terms”.⁵ Interlinkages between development, security and political stability are highlighted. Job creation for the burgeoning youth population is seen as an urgent priority. Agricultural livelihoods and rural development play a central role in the revised ENP:

Agriculture is a major source of jobs in many partner countries and the EU should continue to support sustainable and inclusive policies and investment in modernisation of the sector, and diversification to other income creating activities in rural areas where necessary. The EU will support a resource-efficient economy by addressing environmental challenges such as degradation of and competition for natural resources. Similarly, the EU should also contribute to developing maritime economies, while working together towards a common vision for the sustainable use of shared seas. (European Commission and EEAS 2015: 9)

Hence, the EU’s engagement with the SEM has moved beyond mere trade issues and includes issues of rural development. The European Neighbouring Programme for Agriculture and Rural Development (ENPARD), which runs from 2014 to 2020, is a cornerstone of this revised ENP strategy. It builds on debates in academic and policy circles that see agriculture as part of broader rural development.

5 See the European Commission website: *Review of the European Neighbourhood Policy (ENP)*, https://ec.europa.eu/neighbourhood-enlargement/tenders/consultation_en_en.

ENPARD encompasses two axes: the first axis consists of improved agricultural productivity, market efficiency and food safety and quality standards, while the second focuses on rural development, including economic diversification and infrastructure support. Its focus areas include youth and women, governance of rural territories, good agricultural practices, extension and training, production chain organization and marketing of rural and agricultural products. It also has a horizontal capacity-building support aspect that relies on expertise of the member countries, such as Twinning between public administrations of EU member states and of beneficiaries of partner countries, or the Technical Assistance and Information Exchange Instrument. Hence, agricultural and rural development are part and parcel of the EU's foreign policies and its bilateral relations. Beyond specific humanitarian and developmental food security policies, it has been argued that the EU's food diplomacy should be better embedded in a clear strategic framework that takes broader implications into consideration, such as sustainability, climate change and security policies. The European External Action Service could play a leading role in coordinating such food diplomacy (Fattibene 2016).

4. EUROPEAN STAKEHOLDERS OF EU POLICES ON AGRICULTURE AND RURAL DEVELOPMENT IN THE SEM

Stakeholders are entities with outspoken interest in a policy matter. They have different sizes, forms and capacities. Their reach and scope vary considerably; often they are organized across a spectrum of single issues. There is not necessarily a unified platform, which can hamper information flows and reduce potential spillover effects. For the purpose of this paper EU stakeholders fall into three categories: (1) supranational, national and regional public bodies, (2) producer associations and other lobby organizations along the agricultural value chain and (3) NGOs and research centres.

All of these are stakeholders of EU policies on agriculture and rural development in the SEM. They may affect such policies or be affected by them and seek to assert a positive or negative influence on their completion, depending on their views and interests.

4.1 SUPRANATIONAL, NATIONAL AND REGIONAL STAKEHOLDERS OF THE EU

The European Committee of the Regions (CoR) is the European Union's assembly of regional and local representatives. The European Commission, the Council of the EU and the European Parliament have to consult it when drawing up legislation on matters concerning local and regional government. The Euro-Mediterranean Regional and Local Assembly (ARLEM) is part of the CoR. It works on issues of sustainable agriculture, water management and desertification in the Mediterranean via its Commission for Sustainable Territorial Development.

Beside its core institutions, the EU relies on non-EU institutions in its outreach to the SEM. Partly EU-funded bodies such as the UfM and the European Institute of the Mediterranean (IEMED) in Barcelona or the Center for Mediterranean Integration (CMI) in Marseille have been created in order to strengthen existing European ties with the southern and eastern shores of the Mediterranean.

Public bodies on the national and regional level that are engaged in agricultural issues also receive substantial EU funding, such as the Institute for Agricultural Research and Training in the Andalucian region in Spain or the government of the Puglia region in Italy. Both conduct research and give technical, educational and financial support to projects that pertain to agricultural cooperation and projects in the EMP.

4.2. PRODUCER ASSOCIATIONS AND OTHER LOBBY ORGANIZATIONS ALONG THE AGRICULTURAL VALUE CHAIN

International and national producer associations and other lobby organizations along the agricultural value chain (procurement, processing and distribution) play a powerful role in influencing decisions on agriculture in Brussels. Their activities range from extension services and technical advice to advocacy issues and international cooperation. The pan-European lobby groups are particularly influential and occasionally include non-EU members such as Turkey or Russia.

The European Food Safety Authority works closely with over 100 registered stakeholders, which it lists on its website.⁶ The stakeholders provide inputs for EU policy-making via two standing platforms and ad-hoc working groups, colloquia and discussion groups. They monitor legislative processes and strive to spot emerging trends early in order to influence them. Promotion of consumption and exports of their products, as well as information and training of members in production and food safety standards also form part of their remit. Some of these stakeholders participate in EU Civil Dialogue Groups from DG Agriculture, DG Health and Food Safety and DG Trade, and engage in initiatives promoted by the Commission, such as those on Diet, Physical Activity and Health and on Food Losses and Food Waste.⁷

Among important agri-food lobby groups in Brussels are the European Farmers and Agri-cooperatives Association (COPA-COGECA), the European Fresh Produce Association (FRESHFEL), the European association representing the trade in cereals, rice, feedstuffs, oilseeds, olive oil, oils and fats and agrosupply (COCERAL), the European Federation of Food, Agriculture and Tourism Trade Unions (EFFAT), FoodDrinkEurope, the European Federation of the Trade in dried fruit, edible nuts, processed fruit and vegetables, processed fishery products, spices, honey (FRUCOM), the European Association of Sugar Manufacturers (CEFS), the European Dairy Association (EDA) and the European Crop Protection Association (ECPA). There are also international lobby organizations that are located elsewhere than Brussels, such as the International Olive Council (IOC), which is based in Madrid.

COPA-COGECA is particularly important. It has been described as an “auxiliary bureaucracy” to the Commission’s DG Agriculture and is involved in a number of European Technology Platforms alongside agro industry representatives (Corporate Europe Observatory 2012). It is the union of two different agricultural producer associations, the Committee of Professional Agricultural Organisations (COPA) and the General Committee for Agricultural Cooperation in the European Union (COGECA). Together they integrate 76 organizations from the EU member

6 European Food Safety Authority, *List of Registered Stakeholders*, updated 8 December 2017, <https://www.efsa.europa.eu/sites/default/files/stakeholders-registered-list.pdf>.

7 See European Commission website: *EU Platform on Food Losses and Food Waste*, <https://europa.eu/!nY33PB>.

states and represent 28 million farmers. They also represent producers in other European countries such as Iceland, Norway, Switzerland and Turkey. With some justification, COPA-COGECA sees itself as "Europe's strongest farming representative organisation".⁸ It covers a variety of issues – from renewable energies and climate change to free trade agreements, promotion of a healthy diet and gender-related issues – in its activities and its position papers, which it distributes via traditional media and social media campaigns.⁹

Beside pan-European organizations like COPA-COGECA there are national producer associations, such as RECOMED in Italy (Rete Città dell'Olio del Mediterraneo), ANECOOP (Spanish association of citrus cooperatives), INTERCOOP (Spanish cooperative group), CONFAGRI (Confederação Nacional das Cooperativas Agrícolas e do Crédito Agrícola de Portugal), CIVAM (French farmers association), ADEPTA (association of French companies specializing in the manufacturing of equipment and the building of production units for the agro-industrial industry throughout the world) and ANIA (Association Nationale des Industries Alimentaires). Many of them have representation office in Brussels, mostly under the umbrella of COPA-COGECA, but they also advance their interests individually. Some countries have more than one producer association, for example Spain (ASAJA, UPA and COAG) and Italy (Coldiretti, Copagri, Confagricultura and CIA). Others have merged all their associations into one national association, like the Deutscher Bauernverband (DBV) in Germany. The associations of Spain, Italy and France have particular interest in the SEM as they form a cluster representing 60 per cent of the European fruit production, as a representative of a Spanish farming cooperative pointed out to us during the interview (Interview 9). While Italian representatives also saw complementarity of interests between the three countries, they pointed to a pronounced North–South divide, with northern countries better organized within the EU and France playing on both sides, sometimes rooting for specific southern concerns like fruit and in other cases caring more for northern priority interests such as grain and dairy (Interview 5).

In its lobbying, COPA-COGECA typically relies on internal consensual decisions on priorities, with the possibility of voting if push comes to shove. National and regional associations engage in additional lobbying in sectors where they have pronounced interests (e.g., Spain/ Andalusia in the case of olive oil).

4.3. NGOs AND RESEARCH CENTRES

NGOs are focused on training, technical assistance and publications. For training purposes they cooperate with local agencies from the northern shore of the Mediterranean in order to share know-how. A majority of them are partly supported by the European Union. They also obtain grants from public bodies and private donors. We have selected some of the most active ones in terms of agricultural initiatives in SEM countries, divided them by country of origin.

In France, Agrisud works in Tunisia and Morocco and develops projects related to professionalization of agricultural holdings in rural areas in these countries, Touiza focuses

⁸ See COPA-COGECA website: *History & Objectives*, <http://www.copa-cogeca.be/Main.aspx?page=CogecaHistory&lang=en>.

⁹ Campaigns: *#FruitVeg4You*, <https://freshfel.org/what-we-do/fruitveg4you>; *#livestockcounts*, https://www.copa-cogeca.eu/campaign202016_17.aspx; *#votefarming*, <https://www.copa-cogeca.eu/competition20130513.aspx>.

on Algeria and Tunisia, and ACTED (Agence d'aide à la Coopération Technique et au Développement) collaborates with the International Centre for Advanced Mediterranean Agronomic Studies (CIHEAM). In Spain, some NGOs are dedicated to the preservation of rural areas or specific regions, such as ARUME (Asociación Rural Mediterránea), ANDANATURA (Fundación Espacios Naturales de Andalucía) and MADECA (Málaga, Desarrollo y Calidad). Others are related to sustainable development: the CONAMA Foundation, ARCA (Associació d'Iniciatives Rurals de Catalunya) and the Social Promotion Foundation.

Research centres are also important stakeholders of EU policies in the SEM and inform policy-making. Their focus ranges from broad-based social science research to specialization on agriculture or Mediterranean topics. Some of them are international and have branches in several countries, such as CIHEAM, the World Water Council (WWC) and the IUCN Centre for Mediterranean Cooperation. CIHEAM has institutes in four different Euro-Mediterranean countries (France, Italy, Spain and Greece) and is a leader in research about agriculture in the Mediterranean. It has 13 member states in the Mediterranean and works closely with organizations from both shores. The WWC is focused on water issues. Located in Marseille, this multi-stakeholder platform aims to promote awareness on critical water questions. It is engaged in policies and practices related to water resource management.

Noteworthy national institutes in France are the Mediterranean World Economic Foresight Institute (IPEMED), the Institute for Sustainable Development and International Relations (IDDRI), the French Institute of International Relations (IFRI), the Agricultural Research Centre for International Development (CIRAD) and the International Research Center on Environment and Development (CIRED). In Italy the major research institutions working on agriculture are the Council for Agricultural Research and Economics (CREA) and the Euro-Mediterranean Center on Climate Change (CMCC). In Spain, the Institute for Advanced Social Studies (IESA) is a prominent research institute working on agricultural issues in the Mediterranean. There is as well a joint Hispanic-Portuguese agricultural research centre (CIALE). In Greece the Hellenic Foundation for European and Foreign Policy (ELIAMEP) has held conferences related to agriculture in the Mediterranean.

5. TRADE WITH THE SEM MATTERS, RURAL DEVELOPMENT NOT SO MUCH: RESULTS FROM CONTENT ANALYSIS AND STAKEHOLDER CONSULTATIONS

To identify prevalent views among European stakeholders, we have first carried out a content analysis of more than 50 documents, seminars and networking events. This helped to identify issues and compare public statements with opinions that we encountered in the subsequent second step, when we conducted 17 interviews with some of the stakeholders in Brussels, Paris and Madrid between January and February 2018. Two interviews were conducted via telephone and Skype. Regarding the type of stakeholders, the interviews mostly covered producer associations and lobby organizations along the agricultural value chain (13 interviews), in addition to public bodies (2 interviews) and research centres (2 interviews). Half a dozen NGOs were contacted as well, but declined to be interviewed, either because they felt the topic of the European Partnership Policy was outside the scope of their activities or because they argued that the ENP had a macro and trade focus that was not immediately relevant for

their grassroots work. Instead a content analysis of their publicly available documents was undertaken. Among the interviewees were 3 females and 14 males (see Annex 1). A list of the questions addressed to the selected stakeholders is provided in Annex.

5.1. THE BIG PICTURE

The differences in agricultural production and the size of estates between north, south and east Europe that we have outlined in Section 1 are reflected in the interviews with the stakeholders and their publications: when it comes to the SEM, northern and eastern countries are concerned about export markets for cereals, meat and dairy and the southern countries about competition in fruit and vegetables, especially citrus and olive oil. Like the eastern countries, the southern member states also have a larger share of smallholders among their agrarian population and are institutionally less unified than the lobby groups of northern countries. Italy and Spain for example do not have one national umbrella organization, but several. This can put them at a disadvantage as they not always speak with one voice, face higher transaction costs and suffer from information asymmetries. The Netherlands is particularly interested in trade liberalization and trade growth, as the country is the second largest agro-exporter in the world (CBS 2018). This stance can clash with producer interests in the south of the EU that prefer a more protectionist stance.

Geographically intra-European regulations, Mercosur and North America are most frequently discussed in publications of the producer associations. This reflects the importance of domestic markets and the high share of intra-EU trade in overall exports on the one hand. On the other hand it points to the importance of North and South America as sizable export markets, but also as competitors. In comparison the SEM is not as high on the priority scale of producer associations and other lobby groups. Specific discussions of EU policies in the SEM are rare in their publicly available documents. COCERAL for example has developed plenty of position papers on European policies,¹⁰ but has published none on SEM issues. Only one of our interviewees was aware of EU programmes for rural development in the SEM, such as ENPARD (Interview 10). More detailed engagement with EU policies in the SEM can be found on the part of research centres and NGOs.

The main concern of producer organizations and lobby groups along the agricultural value chain relates to trade issues. Here the concern is less about tariffs, which have been considerably reduced (see Section 1), but rather about compliance with EU regulations and food safety and environmental standards. Only then could a level playing field for competition be guaranteed, they argue. In this context representatives of producer associations also criticize poor labour conditions and low wages in SEM countries (Góngora and Belmonte 2006; Interviews 2, 3 and 10).

Beside trade reciprocity, there are other recurrent issues that were brought up during the interviews by stakeholders of producer associations and lobby groups of companies along the agricultural value chain:

1. Transparency in the quota of sensitive products such as tomatoes, cucumbers, zucchini,

¹⁰ See COCERAL website: *Position Papers*, http://www.coceral.com/list_infos/position%20papers/1011306087/list1353580564.html.

strawberries, tangerines, garlic and sugar.¹¹ Insufficient control of the real export numbers between the SEM countries and the EU opens the space for violations on the agreed amounts, which leads to increased supplies and lower prices. This could be solved, in the opinion of some of the producer associations interviewed (Interviews 5, 12 and 17), by adding a safeguard clause that would allow the EU to act in case it identifies a distortion in the market.

2. (Traceability of the product. EU producers consider this a key element that is missing in the agreements with SEM countries. Without traceability, it is hard to identify the origin of a given product.
3. The strict phytosanitary norms in the EU are not applicable to third countries, thus exempting them from compliance with the regulations and the procedures that EU producers have to follow (COPA-COGECA 2007).

EU sanctions against Russia, and Russian counter-sanctions against agricultural imports from the EU, are a major concern for many producers, as expressed in Interviews 3, 7 and 9. As a result, Turkey and Maghreb countries have managed to capture a good part of this important market for fruit and vegetables, although Turkish exports were also sanctioned for a period between 2016–17 after Turkey downed a Russian warplane at the Turkish–Syrian border. Stakeholders from producer associations (Interviews 10,12,13 and 14) mentioned a direct transport line from Agadir to Saint Petersburg. Competition also exists in the case of Gulf countries, which have developed into an important market where EU producers compete with Maghreb countries, as a representative of a Spanish farming cooperative pointed out (Interview 12).

5.2. THE VIEW OF PRODUCER ASSOCIATIONS

There is an intensive follow-up of the trade agreements between the EU and the SEM countries.¹² Several representatives of lobby organizations mentioned Morocco, Turkey and Tunisia while complaining about the weight of SEM countries in the European agricultural market (Interviews 3, 10, 12, 13 and 14). However, some of them were relatively sanguine about Morocco, as they pointed to limits of further production expansion there for lack of water (Interview 13). One representative of a citrus association identified Egypt as a major new competitor over the last five years and complained about price dumping (Interview 12). He was afraid that the Toshka project in the south of the country could lead to an increase of Egyptian exports.

In the course of the interviews, some stakeholders pointed out the difficulties they encounter when trying to express their views to the EU (Interviews 3, 13 and 14). While there are fluid communication channels for the CAP negotiations, EU stakeholders complain about their limited influence in the consultation period prior to the signing of a trade agreement, thus suffering the consequences of something they have not fully participated in. Three representatives of national producer organizations in Spain also described agricultural concessions over market access to SEM countries as a "negotiation currency" in wider political negotiations of the EU with the Maghreb countries that include hard security issues and non-agricultural development

¹¹ "EU Parliament Approves Morocco Agriculture Trade Deal", in *Reuters*, 16 February, 2012, <http://reut.rs/zo4nQs>.

¹² "Bruselas y Rabat llegan a un acuerdo para poner fin a la disputa por los aranceles al tomate marroquí", in *Europa Press*, 20 June 2014, <https://www.europapress.es/economia/noticia-economia-bruselas-rabat-llegan-acuerdo-poner-fin-disputa-aranceles-tomate-marroqui-20140620182034.html>.

(Interviews 3, 12 and 14). Agricultural trade agreements were not solely influenced by industry-specific considerations, they argued.

The EU is Morocco's major trading partner, representing 59.4 per cent of its trade in 2017, i.e., 64.6 per cent of its exports and 54.5 per cent of its imports (European Commission 2018c). After Turkey it is the second largest Mediterranean commercial partner of the EU (European Commission 2018b: 2). Its climate and orography are similar to the south of Spain and Italy. Because Morocco's harvest season is longer, it is a particularly fierce competitor for the Europeans in goods such as citrus, olive oil and vegetables. However, this ostensibly "Moroccan" competition often comes from big European corporations – mainly from Spain and France – that have invested in export-oriented tomato and strawberry cultivation in Morocco to benefit from low wages of local labour there.

The renewal of the 2000 EU–Morocco trade agreement in 2012 faced opposition from EU stakeholders who uttered their concerns in press releases (UPA 2012, Cooperativas Agro-alimentarias 2012) and media interviews. The peak of COPA-COGECA press releases about EU–Morocco agricultural relations was between 2009 and 2012, ahead of the renewal. Sticking points were sensitive agricultural goods, such as tomatoes, strawberries, citrus and cucumbers (EFE 2010, Coldiretti 2012). The European producers complained that there had been no socio-economic impact assessment prior to the agreement draft (COPA-COGECA 2012) and warned about the consequences for the EU producers, should the agreement be implemented without proper consultations. Since the signing of the agreement in 2012, European producers have complained about systematic breaches of the agreement. Interviewee 12, a stakeholder of a producer association, doubted that due sanctions are applied by the EU in case of non-compliance.

According to press releases from Spanish, Portuguese and Italian producer associations, the trade agreement has led to "unfair competition" and an "oversupply in the market" (COPA-COGECA 2009, EFE 2010, Confagricoltura 2012, Agrodigital 2012, Góngora Belmonte 2014). In 2016 a mixed committee of French, Italian and Spanish producer associations sent the European Commission two letters warning about the "worrying situation" in the tomato market (UPA et al. 2016). Lax controls for goods coming from Morocco allowed importing firms to trade beyond agreed supply quota and have led to calls for stricter border controls (UPA 2013).

Turkey is the most important agricultural producer in the SEM. Interviewee number 12, a representative of a European farmer organization for citrus, complained that Turkey benefits from open access to Europe, while some European agricultural products face tariffs of more than 50 per cent when trying to enter the Turkish market. The lack of reciprocity is a concern for EU producers, alongside phytosanitary issues. During Interview 13, a representative from a producer association mentioned the association's continuous warnings to the EU about the use of forbidden pesticides in vegetables and fruit coming from Turkey. The EU recently classified Turkish lemons as a risk product, he pointed out, leading to more thorough official control when entering the EU territory.

COPA-COGECA is by far the most prolific publisher of publicly available material, of all the lobby groups. In its latest report on Euro-Mediterranean trade, COPA-COGECA maintains a position in favour of multilateral agreements rather than bilateral ones. From its point of view, trade liberalization (especially in the Mediterranean basin) may become an element of risk

for EU producers and have a negative impact in rural areas (COPA-COGECA 2007, 2015). It warns of undue haste in implementing bilateral agreements and asks for sufficient transition periods. It cautions about negative impacts of the agreements on European farmers who have to compete with exports from SEM countries, calling for maintenance of the entry price systems, which limit imports below a certain price, and demanding Community preference as a safeguard clause in case of “oversupply crises” (COPA-COGECA 2009). It also recommends avoiding concessions for sensitive goods and those which have the same seasonal fluctuations as European products (COPA-COGECA 2015). Finally, it insists on strict application of European standards for food safety, labelling and origin rules, environmental requirements and pesticide use, to guarantee a level playing field (COPA-COGECA 2007).

The International Olive Council is another important producer organization given the substantial olive oil exports of SEM countries, especially of Tunisia (see Section 2). It represents about 95 per cent of global production of olive oil. It is a quintessentially pan-Mediterranean organization: The majority of its older members are from the European Mediterranean and all of its newer members are from the southern Mediterranean, except for Argentina, Iran and Uruguay. The European Union has also signed its application to become a member. The EU dominates global olive oil production with 2.1 million tonnes of a total of 3.3 million in 2017/18. Spain is by far the largest European producer with 1.2 million tonnes. Italy (429,000 tonnes) and Greece (346,000 tonnes) follow as distant second and third. SEM countries are significant producers, such as Turkey (263,000 tonnes), Tunisia (280,000 tonnes), Morocco (140,000 tonnes), Syria (100,000 tonnes) and Algeria (80,000 tonnes) (International Olive Council 2018). The EU has granted Tunisia liberalized market access without reciprocity. Yet a European industry representative (Interview 6) did not see this as a problem, as a growing market was able to absorb the influx. Their only concern was about quality standards and pesticide residue levels.

European producers of tropical fruit like mango, avocado and cherimoya complain that there is no specific EU support for their niche sector. Spain represents 40 per cent of the European market. Industry representatives in Interviews 12 and 13 identified Morocco and Israel as Mediterranean competitors. While they had no complaints about Israel's compliance with phytosanitary standards and EU regulations, they did have complaints about Morocco. They feared unfair competition and import of plant pests. Other concerns included the porosity of border controls with Maghreb countries and illicit exports from there, beyond EU contingents for sensitive products.

5.3. SHADES OF GREY

On the other hand some stakeholders are open to cooperate and facilitate market access of SEM countries and their compliance with EU regulations. An association of the agricultural value chain, for example, held workshops with Turkey about compliance with EU pesticide regulations (Interview 15). The goal was to limit pesticide residues in products, also with a view of maintaining and growing pesticide exports to Turkey. But such activities beyond the EU borders are few and far between; similar workshops for example have not been held in Maghreb countries. This might be a missed opportunity, as development of crop protection solutions for specialty crops such as citrus and olives is only a niche market. Cooperation between northern and southern countries could lead to more critical mass and more developments of such crop protection solutions.

Some of the interviewed producer associations (Interviews 12, 13 and 14) fear that the main beneficiaries of the trade agreements with SEM countries are big food distributors, such as Aldi, Lidl and Carrefour, which freely navigate on both shores of the Mediterranean. They argued that these companies have been reshaping the production system in the SEM, shifting it from family businesses to big firms and intensive agriculture with focus on exports, rather than domestic SEM markets. In their opinion, the key to a sustainable agricultural advancement of SEM countries is to complement the free trade agreements with an endogenous development of their domestic markets. This would encourage small farms to expand without being absorbed by big conglomerates that are only focused on exports, they argued. In this context Interviewee 14, who represents a producer association from the south of Europe, criticized the Plan Maroc Vert, an initiative for modernization of agricultural and rural infrastructure that is supported by the EU. The interviewee raised doubts about the EU's monitoring of the plan's implementation and suspected that large commercial farm holdings would benefit disproportionately.

Because of the trade structure between the EU and SEM, the lively interest of European producers of citrus, fruit, vegetables and olive oil in SEM trade issues does not come as a surprise (COPA-COGECA 2012). For other sectors the SEM is less on the radar screen, either as market or competitor. One stakeholder in the animal feedstock sector (Interview 1) pointed out that his industry sources most of its raw materials within the EU. Grains, rapeseed and sugar beets are mostly of EU origin; only soybeans are imported on a large scale, from places such as Brazil, Argentina and North America. SEM countries do not play a role as a market for European feedstock producers, as compound feed is a bulky product that is mostly traded within a radius of 100 km of meat production facilities. The few European exports to markets such as Lebanon and Libya have been taken over by Turkey, which has built feedstock factories in ports that produce for export to other countries, mainly in the SEM.

5.4. SUPRANATIONAL, NATIONAL AND REGIONAL PUBLIC BODIES

Public bodies such as the Euro-Mediterranean ARLEM of the European CoR work closely with SEM countries to advance common interests in the region. In its position paper on the new ENP, ARLEM argues that the ENP should be refocused along three strategic priorities, one of them sustainable territorial development, specifically in the southern part of the Mediterranean (ARLEM 2015). CoR argues that the EU's cooperation policy cannot "repeat past mistakes". It demands that greater priority be given to rural development and food security in partner countries when preparing international aid strategies (CoR 2011: par. 42).

The UfM in Barcelona has engaged in initiatives on agriculture in the Mediterranean, such as the Euro-Mediterranean Ministerial Conference on Agriculture in Palermo in 2014. It is committed to sustainable water management and has published several reports on the Blue Economy in the Mediterranean (UfM 2017). It has also partnered with Revolve Water, a non-profit association dedicated to advancing environmental sustainability. Both published a report in which they link water, food and agriculture in the SEM region (Closas et al. 2017). They highlight that fresh water resources have been profoundly affected by climate change; warming oceans, sea level rise and acidification are already happening and their knock-on effects will be difficult to manage. In their report they call for a more coordinated water policy around the Mediterranean and present a series of success stories from different countries in the region. In recent times UfM has also included the gender dimension of agriculture. Jointly with CIHEAM a new publication on "Strengthening the Role of Women in Rural and Agricultural

Areas" has been released in 2018 (CIHEAM and UfM 2018). CIHEAM has been an important advocate for capacity-building and empowerment of women in fisheries and agriculture in rural Mediterranean areas.

The IEMED in Barcelona has a wide range of documents regarding agriculture in the Mediterranean, from its links with migration (Lacirignola 2017) to trade (Abis 2010) and food security (Siam 2009). It also collaborates with other institutions such as the UN Food and Agriculture Organization or the Euro-Mediterranean Women's Foundation (FFEM), organizing events related to agriculture in the Mediterranean and raising awareness (IEMED 2015a, 2015b).

The CMI in Marseille is also focused on water management and its effects on agriculture in the SEM. Together with other stakeholders in the region such as CIHEAM, the Agence Française de Développement, the Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) and the European investment Bank, as well as with key global stakeholders like the World Bank, it has supported several studies and organized related events (CMI 2017a, 2017b). The AFD and the World Bank reports focus more on technical aspects of water management and agriculture, trying to complement the policy dimension with a more detailed and on-the-ground approach to the issues existing in the region (Leyronas 2015, World Bank 2018). However, the reports also mention (along with respondents in Interviews 7 and 11) that technology, policy and institutional management must progress jointly to achieve policies, pricing, allocation or regulation (World Bank 2018: i).

5.5. RESEARCH CENTRES AND NGOS

The research centres show a much more pronounced interest in specific EU policies in the SEM than do the producer associations. CIHEAM's flagship publication *MediTerra* regularly addresses salient challenges of agriculture in the region such as the future of the Mediterranean diet, sustainable agriculture and rural development (CIHEAM 2008, 2009, 2012). Such work has informed the Mediterranean Sustainable Development Strategy (MSSD), which was launched by the Barcelona Convention in 2001 and adopted in 2005. The contracting parties of the Barcelona Convention then commissioned the Plan Bleu, the regional activities centre of the Mediterranean Action Plan (MAP), to monitor the MSSD, which focuses on four major areas: trade liberalization and promotion of high quality Mediterranean products; agricultural productivity; rural development; and sustainable management of farmlands and the natural habitat. The MSSD stresses local ownership of projects, involvement of all stakeholders, cooperation, solidarity, equity and participatory governance. The gender dimension is illustrated by several indicators, such as rural poverty rates and the number of rural jobs created in SMEs for the young and for women. This aspect was also stressed by other stakeholders in research centres (Interviews 8 and 16). CIHEAM is also sensitive about women's and youth participation in agriculture and is addressing the issue in seminars. It proposes the creation of a public-private inter-institutional platform to protect and advance women's role in natural resources management and food security in the Mediterranean area through actions of institution building as well as promoting best practices of women's empowerment in the MENA region (Navarra and Pellizzoli 2018). Training of women farmers and entrepreneurs on specific subjects, and support of start-up ideas and entrepreneurial activities with knowledge transfer and easier access to credit, are cornerstones of their policy proposals.

A major shortcoming has been the insufficient inclusion of the MSSD in national policies and strategies and the insufficient access of southern Mediterranean countries to European programmes and funding, partly because of their ineligibility, but also because they lack the kind of national development agencies that are instrumental for such access in northern Mediterranean countries (CIHEAM 2009: 353-361). EU food safety standards and their dissemination in the SEM via the European Food Safety Agency are part of the neighbourhood policy. However, quality systems in SEM countries have struggled with low level of coordination along the value chain, only partial tracking systems and lack of technologies and infrastructure (CIHEAM 2012: 454).

The NGOs analysed do not have position papers or documents related to EU agricultural policies in SEM countries. Their limited engagement with the ENP also showed in their declining of interview requests, arguing that the macro and trade focus of the ENP would be beyond the scope and grassroots nature of their work. However, the NGOs in question carry out initiatives in the SEM countries that deal with agriculture, ranging from technical assistance for crop productivity to professionalization of agricultural holdings. For instance, Agrisud currently has five projects in Morocco related to palm trees, fruit production and sustainable agriculture, while MADECA works closely with the regions of Tanger and Tetuan, and together they have developed a plan to enhance sustainable tourism in the region. Main target countries are Morocco and Tunisia and to a lesser extent Algeria, Egypt and Lebanon. Moreover, there is an important rural development dimension. Regions in the south of Europe actively collaborate with their counterparts on the other shore of the Mediterranean in projects related to rural areas, sharing their experience and know-how (MADECA 2014). However, there is still a lot of work to be done on gender issues. Very rarely, these initiatives take women into account or target them explicitly.

CONCLUSION

The EU's agricultural system has evolved from a predominantly national system of regulation with a protectionist stance in the post-war decades to a more open system that aims at integration of expanding global value chains. There has been a trend towards larger farming operations and a declining number of farmers, but small farmers still constitute a sizable portion of the population in many EU countries, especially in southern and eastern Europe.

Producer associations and other lobby organizations along the agricultural value chain are among the most important and vocal stakeholders of EU policies on agriculture and rural development in the SEM. They focus on trade issues and their major problem is with the risk of unfair competition from SEM countries. Usually they are not aware of EU programmes for rural development in the SEM, such as ENPARD, and gender issues hardly figure on their priority scales. From a policy point of view, non-tariff issues such as phytosanitary standards, labelling, traceability and product quality are of greater importance to them than reciprocity of tariffs, which have already been considerably reduced. They are also concerned about what they consider occasional wage and environmental "dumping" by SEM producers, which they feel affects their competitiveness. They also perceive that the EU uses access to the European agri-food market as a negotiation currency when discussing relations with SEM countries on other issues such as security.

There are shades of grey. Some of the organizations cooperate with SEM countries on compliance with EU standards and regulations. Depending on the crop, fears about SEM competition vary. They are most pronounced for citrus and some other fruit and vegetables. Producers of olives and tropical fruit are less concerned. EU exporter interests in cereals, meat and dairy products are less articulate about the SEM. Their main preoccupations are domestic EU issues and other geographical areas such as Mercosur and North America, which are major competitors, but also important markets.

In comparison to the producer associations, public bodies on the international, national and regional level do not engage with the details of EU agricultural policies in the SEM. They do discuss development challenges of the region, but on a more generic level (e.g., climate change, water and food security). Often they also deal with socio-economic issues other than rural development, such as youth unemployment in cities and industrial development.

The selected research institutes and the few NGOs that work closely with local communities in the SEM stress the importance for EU policies in the SEM region to promote rural development, sustainable agriculture and local ownership of projects as well as to ensure the involvement of women farmers, who continue to be marginalized in any policy initiatives, at both national and international levels. The EU would need to engage more with NGOs that undertake grassroots development projects, as so far they show limited awareness of ENP policy priorities and programmes. The development agendas that are investigated by the research institutes and inform ENP programmes (e.g., ENPARD for rural development) are not well known among producer associations and lobby groups along the agricultural value chain. Again the EU could push for more engagement and include such organizations in outreach activities to help SEM producers to comply with EU food safety and environmental regulation. Thereby it could also ease concerns among EU producers about unfair competition from SEM countries in agricultural product markets.

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ANNEX 1: INTERVIEW LIST

Interviewee 1. European association of the agricultural value chain, male representative, 29 January 2018, Brussels, by Eckart Woertz

Interviewee 2. European producer association, male representative, 29 January 2018, Brussels, by Irene Martínez

Interviewee 3. Spanish producer association, male representative, 30 January 2018, Brussels, by Eckart Woertz and Irene Martínez

Interviewee 4. European association of the agricultural value chain, male representative, 30 January 2018, Brussels, by Eckart Woertz

Interviewee 5. Italian producer association, female representative, 30 January 2018, Brussels, by Irene Martínez

Interviewee 6. International producer association, male representative, 31 January 2018, Madrid, by Irene Martínez

Interviewee 7. Spanish public body, female representative, 31 January 2018, Madrid, by Irene Martínez

Interviewee 8. Spanish research centre, male representative, 31 January 2018, Madrid, by Irene Martínez

Interviewee 9. Spanish agricultural cooperative, male representative, 31 January 2018, Madrid, by Irene Martínez

Interviewee 10. Spanish producer association, male representative, 1 February 2018, Madrid, by Irene Martínez

Interviewee 11. Spanish public body, female representative, 1 February 2018, Madrid, by Irene Martínez

Interviewee 12. Spanish producer association, male representative, 2 February 2018, Madrid, by Irene Martínez

Interviewee 13. Spanish producer association, male representative, 2 February 2018, Madrid, by Irene Martínez

Interviewee 14. Spanish producer association, male representative, 2 February 2018, Madrid, by Irene Martínez

Interviewee 15. Spanish producer association, male representative, 5 February 2018, via telephone, by Irene Martínez

Interviewee 16. French research centre, male representative, 1 February 2018, Paris, by Eckart Woertz

Interviewee 17. Italian producer association, male representative, 5 February 2018, via telephone, by Irene Martínez

ANNEX 2: QUESTIONNAIRE

1. As a European producer (or stakeholder), are you aware of the EU specific projects and programmes related to agriculture and urban development in the Southern Mediterranean shore?
2. Do you consider Southern Mediterranean countries direct competitors in the EU market or other markets? If so, which markets?
3. Do you think that the EU policies addressed to agricultural producers from the Southern shore of the Mediterranean are well structured and targeted?
4. Do you consider that these policies promote direct / unfair competition for the EU producers?
5. What are the upcoming challenges for the EU producers regarding the competition from the Southern Mediterranean partners?
6. Do you see the creation of the Euro-Mediterranean Free Trade Area (EMFTA) as beneficial for EU producers? What is your opinion on the Deep and Comprehensive Free Trade Areas (DCFTA) with Egypt, Jordan, Morocco and Tunisia? Can these FTAs be a challenge for EU producers?
7. The ENPARD initiative, which is seen as the cornerstone of the European Neighbourhood Policy (ENP) strategy, goes beyond the agricultural sector and aims to foster rural development in general. What is your opinion on this particular initiative and its repercussions for farmers and rural areas of the EU?
8. The Plan Maroc Vert, which started in 2014 and will last until 2018, amounts to 60 million euros and it has the support and funding of the EU. It aims at "promoting the integration of (Moroccan) agriculture into international markets and help agriculture achieve sustainable growth". It has focused on the core products of Moroccan agriculture: olives, fruits and vegetables. Has this particular plan been in direct clash with EU producers' interests? Has the EU market been under pressure by an increase of supply coming from Morocco since the implementation of PMV?
9. Last year the EU decided to waive taxes on Tunisian oil imports and grant substantial financial help to the country. Thirty-five thousand tons of Tunisian olive oil have been exported to the European Union in the past two years and the production has been increasing steadily. Is it a concern for European producers? Do you think that the EU should consider cancelling direct support to goods that represent a competition to domestic ones in the EU market?
10. The EU strives to include gender-related development issues into its assistance programmes in the Southern Mediterranean (e.g., access of women to land, credit and education). What is your opinion about such gender-related development policies of the EU in the Southern Mediterranean?

MED RESET

مِطَا رِيَسِت



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