

EU-MEDITERRANEAN RELATIONS IN THE FIELD OF AGRICULTURE THE EXAMPLE OF MOROCCO AND TURKEY

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SUMMARY

The EU institutional relationships with the Middle East and North African countries (MENA) started in the 50's and are currently defined by the European Neighbourhood Policy (ENP). **Trade liberalisation plays a key role between the EU and the MENA countries.** The Barcelona process or "Euro-Mediterranean Partnership" aims to establish a Euro-Mediterranean Free Trade Area. Currently there is duty free access to the EU market for manufactured goods and preferential treatment for exports of agricultural, processed agricultural and fisheries products. **EU and MENA countries share common interests but have some issues that require pro-active strategies for cooperation in order to avoid negative results.** The political integration process for candidate countries (the case of Turkey) demands institutional adaptation to EU's rules such as the Common Agricultural Policy (CAP). **Trade liberalisation can be positive in net terms but it also creates losers. Accompanying measures are needed to ensure everybody's well-being in the medium and long term.**

The MENA countries with deeper relations with the EU are Turkey and Morocco. **The trade balance between Morocco and Turkey with the EU is globally favourable to the EU but negative in the case of the agricultural trade.** This deficit has been reduced since 2006, showing increased European agriculture competitiveness. **In the medium term, the situation can change given the agricultural potential of both countries only if they can overcome their weaknesses.**

“THE TRADE BALANCE BETWEEN MOROCCO AND TURKEY WITH THE EU IS NEGATIVE FOR AGRICULTURAL PRODUCTS BUT COULD EVOLVE”

There is a need for more cooperation in the two issues and from the two sides. Cooperation programmes (e.g. MEDA I and II) have been useful but **because of their economic and social impact, more should be done in agricultural terms.** The new European Neighbouring Programme for Agriculture and Rural Development and the ERA-ARD net should play a positive role in MENA countries. Specific compensation measures for European producers must also be considered. **The EU has a long and fruitful experience to help members and candidates to cope with increased competition due to political and economic integration. It could be extended to Euro-Med cooperation.**

Efficient EU policy instruments should be extended to MENA countries to reduce tensions among these countries (e.g. LEADER, Producers' Organisations, and Interbranches). Intergovernmental organisations as the IOOC, civil and hybrid institutions and Foreign Direct Investment can play an increasing role in the future (e.g. CIHEAM, CLAM, COPA-COGECA, and binational or regional committees). Those actions must be developed with all stakeholders working in rural and agricultural development.

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INTRODUCTION

Since the Arab Spring, the European Union (EU) has conducted a deep review of its **Mediterranean neighbourhood policy** to improve its efficiency and reinforce its ambition and financing¹. Among the different axes of EU-Med relations, the EU continues the Barcelona process² which promotes trade integration with its MENA (Middle East and North African) neighbours in the framework of the **Euro-Mediterranean Free Trade Area (EMFTA)**. This integration is carried out through a series of bilateral FTAs (called **Association Agreements**) among the EU and each one of the MENA countries and a series of horizontal FTAs between the MENA countries themselves. This approach fosters regional integration through the bilateral agreements. The integration is being done in a gradual and asymmetric process to allow the adaptation of potential losers to the new competition and to prevent strong shocks. Due to their sensitiveness, several agricultural and agrifood products are excluded from free trade and remain subject to **quantitative restrictions**. This has impeded full liberalisation.

Box 1. EU-Med region facing a diversity of challenges

The Mediterranean region is of strategic importance to the EU, in both economic (trade, energy, migration) and political (security, stability) terms. The EU has a huge interest in encouraging economic development and employment creation in it. Before the Arab Spring, the political situation in the region was already characterised by persistent tensions due to several facts (e.g. the Middle East conflict, in several countries domestic political tensions, the unresolved status of Western Sahara, the sealed border between Algeria and Morocco). In the economic domain, fast demographic and labour force expansion along with the slow economic growth led to high unemployment and stagnating incomes; some estimates suggest that up to 40% of people in Morocco between 15 and 34 years of age are unemployed. In the socio-political field, several deficits can be highlighted: an overall freedom deficit, women empowerment deficit and the lack of access to knowledge and education. In the environmental field, a growing concern arises due to the non-sustainable management of the environment and natural resources.

Growing critics are emerging against the economic and social cost of the liberalisation, mainly into the agricultural sector. These arising understandings and misunderstanding pose a challenge to the consolidation of a common social and economic space in the Mediterranean. This Policy Paper aims to identify and assess the **main points of controversy** related to the EMFTA between the EU and its partner countries, and the **ways to mitigate them** from the European point of view. The Policy Paper explores some of the issues related to the agricultural sector and the rural communities by focusing in two major partners in the region: Morocco and Turkey.

From the EU side, bilateral **Trade Agreements** (BTA) are a key in its common trade, development and cooperation policy. These PTAs can adopt several forms:

- agreements with potential or actual candidate countries for accession into the EU;
- agreements with countries that are in the EU “geographic neighbourhood”, or that are part of long-standing historical and cultural ties with Europe; and
- agreements with other countries that are of strategic importance to EU commercial interests³.

1. The views expressed in this Policy Paper are those of the authors and do not necessarily reflect those of the institutions for which they work. The authors thank the Sustainmed help for this Policy Paper. Some of the figures and arguments presented in this Policy Paper refer to findings from the project “Sustainable Agri-Food Systems and Rural Development in the Mediterranean Partner Countries” (SUSTAINMED, FP7-KBBE-2009-3), partly funded by the EU Commission.

2. The Barcelona process was launched in 1995.

3. United States Mission to the European Union, Foreign Agricultural Service, GAIN Report E480005.

Countries of the Eastern and Southern Mediterranean fall in all these three groups. First, some countries like Turkey are candidates; second, due to the geographical proximity, the Maghreb and Europe have been trading intensively for centuries and there are a lot of historical links in the socio-political field; and third, for the EU the North and South of the Mediterranean are regions and countries of high strategic interest, that is the case of Morocco.

The situation is not the same for all countries. **Turkey** is one of the more developed and richer countries among the MENA (Table 1). It is also its biggest agricultural producer (Figure 1) and the only MENA country with a surplus in the agricultural balance. Turkey has an incomplete Custom Agreement with the EU and it is a candidate country for several decades. Turkey is a very important partner for the EU since it is the 7th import partner (2.8% of EU's total imports), the 5th export partner (4.7% of EU exports) and, overall, the 6th major EU trade partner (3.7%, in 2011). These figures point out that Turkey is the first trade partner of the EU among the MENA countries.

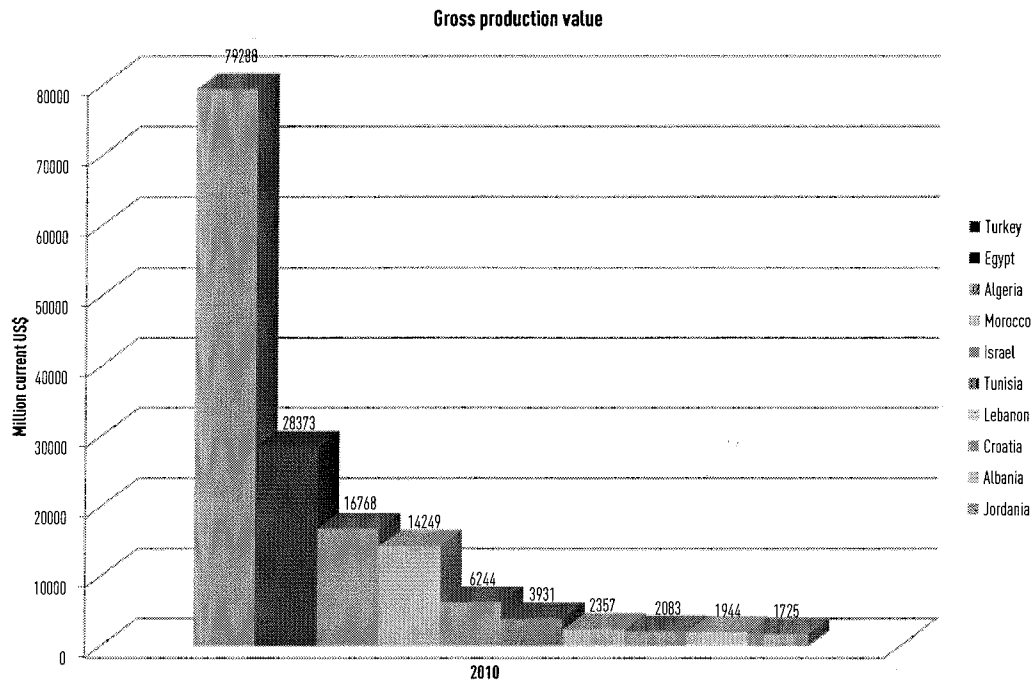
With **Morocco**, in a less advanced socio-economic stage (Table 1), the trade relation has evolved from a Preferential Trade Agreement towards an incomplete Free Trade Area. It enjoys a special status among the MENA countries. For both countries, there are duty free access to the EU market for manufactured goods and preferential treatment for exports of agricultural, processed agricultural and fisheries products. **Morocco** is a smaller partner: it ranks as the 38th importer (0.5% of EU's imports), the 23rd exporter (1% of EU exports) and, overall, the 28th trade partner (0.7%).

Table 1. Main socio-economic indicators of Morocco and Turkey

	DEVELOPMENT INDICATORS	
	MOROCCO	TURKEY
GDP (US current, 2011)	102.2 billion	773.1 billion
Population	32.27 million	73.64 million
GNI per capital (current US)	2,970 (Lower middle income)	10,410 (Upper middle income)
Life expectancy (2011)	72	74
Poverty line (%)	9	18.1
HDI (2011)	0.582 (130/187)	0.699 (92/187)
GII	0.510 (104/146)	0.443 (77/146)
Multidimensional Poverty Index	0.048 %	0.028%
Inequality Adjusted HDI	0.409	0.542
Sustainability	25% GNI	2.9% GNI
Gini Index	40.9 (2007)	39 (2008)
World Corruption Index	3.4 (80 th)	4.2 (61 st)
Doing Business 2012	94 th /183	71 st /183
Global Competitiveness Index	73 rd /142	59 th /142
Economic Freedom 2012	60.2 (87 th)	62.5 th (71 th)
Agricultural production (2010)	14,249	79,288
Gross Production Value (current million US\$)	4,180	9,872
Agricultural imports (Millions USD)	1,962	11,799

Source: Own elaboration based on World Bank, UNDP, TI, World Economic Forum and Heritage Foundation.

Figure 1. Agricultural production in the MENA countries



Source: Own elaboration based on FAOSTAT.

With the two countries, the trade balance is positive, and growing during the last years, for the EU. In **agricultural trade**, the picture is quite different. Both countries are very important partners for the EU, which is net importer (-362 € with Morocco and -51€ with Turkey in 2011), although the deficit has been decreasing from 2006 in both cases. In the last decade, food imports increase from Turkey has been higher (+81%) than Morocco's (+49%). Turkey and Morocco are the two main MENA suppliers of fruit and vegetables: the former accounts for 49% of EU's imports from Euromed and the latter accounts for 22%, although Morocco is the main vegetable exporter to the EU.

In this introduction, the agricultural relations between the EU and its Med neighbours is placed in its institutional and commercial context; the first part presents two case studies – one trade issue, Morocco, and other political, Turkey –, to understand the nature of the agricultural conflicts; the second discusses the facts of the trade and the expectations of the Euro-Mediterranean economic space, the third reviews the existing and desirable cooperation's instruments and its usefulness to accompany the development of the agreements and finally, it advances the conclusions and recommendations.

Box 2. EU-Med relations: Brief history of the political framework

The EU-Med trade agreements are immersed in a complex and on-going political framework since the 60's. Modern agreements started with the **Euro-Mediterranean Partnership (EMP)**, born in 1995 as the Barcelona Process. It was followed by the **European Neighbourhood Policy (ENP)** in 2003, of which the **Union for the Mediterranean (UfM)**, launched in July 2008, is currently one of the two major multilateral sub regional components – the other is the Eastern Partnership.

The ENP reinforces the EMP: in trade terms, its aims to promote **further trade liberalisation** covering agriculture, fishery and processed agricultural products. The process is combined with **"accompanying" measures** concerning rural development; the promotion and enhancement of Mediterranean products and also involves plans to liberalise services and investments. On 14th December 2011, the Council authorised the Commission to open bilateral negotiations to establish **Deep and Comprehensive Free Trade Areas (DCFTAs)** with Egypt, Jordan, Morocco and Tunisia. These DCFTAs go beyond trade liberalisation to cover all regulatory issues relevant to trade, such as investment protection and public procurement.

The Euro-Mediterranean Free Trade Area encompasses also agreements among Southern Mediterranean countries themselves (South-South approach, encouraged by the EU). The **Agadir Economic Agreement** between Tunisia, Morocco, Jordan, and Egypt (2004) remains open to other Arab Mediterranean countries; the FTA between Israel and Jordan; Egypt, Israel, Morocco, the Palestinian Territories, Syria and Tunisia have signed bilateral agreements with Turkey.

The result of all these EU-Med links is a large network which covers trade but also cooperation in a vast range of areas of mutual interest including security, democracy, justice and sectorial policies, with the aim of promoting peace, stability, and prosperity in the region.

1. Agriculture in EU-Med relations: Two case studies

1.1. The case of Morocco

1.1.1. Brief overview

Since its independence, Morocco has relied on agriculture as a key sector for its economic development and a national priority but its performance is consistently below expectations. Morocco's agriculture has clear comparative advantages such as land and cheap labour⁴; sun and long production season; relative proximity to EU markets; low social, institutional and environmental costs, although this is related to its developing condition; richness of soil; longstanding trading relationships with European countries, especially France; important financial support from international institutions and public support for some clusters – e.g. subsidies for new citrus plantations and for irrigation equipment⁵ –; Morocco⁶ continues being a rural and agriculture traditional country.

“ MOROCCO'S
AGRICULTURE HAS
CLEAR COMPARATIVE
ADVANTAGES”

However, many factors hamper Morocco's agricultural potential: crops highly sensitive to weather conditions, weak farm structures (about three quarters of farms do not exceed 5 ha, and an average herd of four cows per farm), water resources⁷, legal complexity of the land tenure system, illiteracy and training lack in rural areas, insufficient production material and techniques, land property in few hands, weak institutional capacity, insufficient extension, research and marketing services, weak farming organisations and high dependency on few export commodities – such as fish, oranges and tomatoes – and export destinations.

4. The Guaranteed Minimum Agricultural Wage (SMA6), fixed since 2011 at 60,63 DH/day.

5. The World Bank is supporting the implementation of Morocco's National Human Development Initiative (INDH) as well as other rural CDD-type projects as the Oum-Rbia irrigation and agriculture modernisation project in Morocco or the "Millennium Challenge Account", a large programme of tree plantations

6. In its 2011 report the High Commission for Planning (HCP) ascribes the failure of the management of economic and social development in Morocco to lack of comprehensive strategies, lack of engagement of different players in economy, lack of post-projects evaluation, lack of coordination in addition to the heavy reliance on foreign investment, another hurdle that undermines prospects for economic development remains the dependency on energy imports. In fact, Morocco imports 98% of its energy needs from the international market.

7. As in other Mediterranean countries, agriculture accounts for 80% of resources. The proportion of the irrigated Utilised Agricultural Area (UAA) of farms amounts to 31% for the biggest ones, 64% for the middle ones and only 5% for the smaller ones.

Box 3. Agriculture in Morocco – Facts and figures

Agriculture represents 14 per cent of the GDP, the sector employs over 4 million people, including about 1,000,000 in agro-industry, 43 per cent of the labour force is in agriculture, and 18 million people live in rural world (49% national families). Grains account for over 65 per cent of agricultural surface (8.7 million ha) and contributed 19% of agricultural GDP, while vegetables, with 3% land, gives 13% GDP; wheat has expanded dramatically over the last 20 years because of the government support. Moroccan agricultural production depends heavily on rainfall as less than 10 per cent of the arable land is irrigated. Irrigated land has passed from 100,000 ha in 2003 to 250,000 in 2010. Agriculture duality is very strong.

Exports to EU countries account for more than 70% of agricultural exports throughout the last 40 years. Morocco's over-reliance on trade with Europe makes it vulnerable to external shocks. Moreover, during the 1990's, Morocco has become increasingly sensitive to global competition and the erosion of preferences, as the EU has concluded similar FTA's with many other third countries.

Unlike many similar countries, Morocco is trying to modernise its agricultural sector. From 2008, the **Green Morocco Plan** (GMP) is the most important instrument of its agricultural policy⁸. The aim is both to reduce poverty and to improve the competitiveness of Moroccan agriculture. GMP is very ambitious and is expected to contribute 15.6 billion € (174 billion dirhams) to its GDP. It intends to create 1.15 million jobs by 2020 and triple the income of nearly 3 million people in rural areas.

Citrus production is projected to grow from its current level of 1.7 million MT to 2.9 million MT by 2018, through expanding citrus planted areas by 20,000 hectares and renewing old plantation of 30,000 hectares. It also aims to increase by 40 per cent the olive trees area and by 76 per cent the fruits and vegetables until the year 2020 (2011). Its irrigation plan entails the transformation of 550,000 ha until 2020; total annual investment of 0.9 billion € (10 billion dirhams) until 2020; the creation of 6 agropolis (Meknes, Berkane, Souss, Gharb, Tadla and Haouz) and the Agency for Agricultural Development (ADA), which oversees the implementation of GMP⁹.

A total of more than 700 projects could be financed in the future, with an estimated budget of more than 10 billion euros. The plan is intended to have an impact on more than 400,000 farms, both small family-run ones and intensive agro-industrial enterprises. The main risks are that GMP concentrates support in the already existing large domains, industrial-like farms (Pillar 1), especially for economic reasons, instead of small farmers (Pillar 2), despite the declared political will by Moroccan authorities and the EU's efforts. It is the main criticism which could be done.

1.1.2. The agri-food trade issue in Morocco

“ THE COST OF TRADE AGREEMENTS IS NOT TAKEN INTO ACCOUNT ENOUGH ”

In the southern EU regions, there is a solid narrative among some agricultural producers stating that the cost of trade agreements is not taken into account enough regarding mainly the fruit and vegetable production. Hence, the agreements are considered unfair. As it happens before with other external agreements and some enlargements (for instance, 1986), this idea is also present in the EU institutions¹⁰.

This perception became clearer than ever during the **last agricultural negotiations** with Morocco. The **extended EU-Moroccan Free Trade Agreement**¹¹ faced **stronger opposition than expected** in the European Parliament procedure. It was rejected by the EP Agriculture Committee on July 2011 by 24 votes against, 2 in favour and 14 abstentions. Finally, on 16th February 2012, the plenary of

8. The GMP is based on two main pillars. Pillar 1 focuses on developing highly-productive or high added value modern agriculture which complies with market rules and depends on private financing of 700 to 900 projects for an annual global cost of 10 to 15 billion dirhams. Pillar 2 concerns the development of solidarity agriculture by improving the poorest farmer's revenues, especially in remote areas. Within this pillar it is expected to finance 300 to 400 social projects within the Regional Agricultural Plans (RAP). These aim at converting precarious activities in higher added value activities, which are less sensitive to water scarcity and which have a significant adaptation capacity to climate change.

9. For Morocco, see *Agriculture 2030, Quel avenir pour le Maroc ?* En collaboration avec le Conseil général du développement agricole (CGDA). The second Green Morocco Plan launched by Rabat two years ago did not fulfil the expectations and the European investors did not work in the business of the Government of Morocco.

10. On 14 May 2012, the European Parliament approved the Rinaldi report on "Trade for Change: The EU Trade and Investment Strategy for the Southern Mediterranean following the Arab Spring revolutions" by 479 votes in favour, 64 against and 40 abstentions. The principle reservations were voiced by deputies concerned about the potential impact on the Union's farmers, of the free trade called for in the report.

11. On 13 December 2010, the Agreement was signed by the Council and the Moroccan authorities.

the Parliament gave the green light, but with important votes against (369 votes in favour, 225 against and 31 abstentions), which shows the important institutional polarisation. Maybe this positive final result could be understood as a strong political support to Morocco's reforms in these trouble times of the Arab Spring and as a clear signal of the EU's engagement towards full trade liberalisation¹².

Trying to offer something to the opponents, in an accompanying resolution, Parliament called on the Commission to monitor strict application of quotas and strengthen controls to avoid alleged fraud in the entry price system. The resolution also requests an assessment of the impact on European producers and farmers' incomes.¹³

1.2. The case of Turkey

1.2.1. Brief overview

“AGRICULTURE IS
NOT ONLY AN ECONOMIC
SECTOR, BUT PLAYS AN
IMPORTANT SOCIAL ROLE”

Turkey is a country with a diversified agriculture, largely based on small farms, many not very productive. The adjustment follows the trend of the emerging countries. Agriculture is not only an economic sector, but plays an important social role. Plans for conversion of Turkish agriculture have led to a gradual liberalisation and a paternalistic agricultural policy, based on payments recently linked to the production. It has a huge export potential but is based on disorganised value chains as well as a strong orientation toward extra-EU markets and limited harmonisation of quality standards with the demands of the European legislation. It is a model of consumption that is changing rapidly and that puts Turkey before the possibility of increasing imports of commodities. The variety of climatic zones allows the production of grains, but vulnerable to international competition.

The impact of accession would require adjustments in the Turkish agriculture. But the market exposure of small farms in the member states and in Turkey involves more or less similar challenges. Turkey has only recently initiated rural development strategies similar to the EU policies. This opens a field for cooperation between the administrations and the civil society, especially for objectives related to the environment, rural diversification, local development, institutional building and management of programmes.

1.2.2. The effects of EU application on Turkish agriculture

Turkey applied for European Union accession in 1987. In 1995, an important step towards integration was taken: the creation of the Customs Union. But in this agreement, the extent of liberalisation in agricultural products is still limited so a full membership of Turkey to the EU could have significant effects on both agricultural sectors. Since the Helsinki European Council of December 1999, Turkey is a candidate country for EU accession but current negotiations did not begin until October 2005. In May 2012, the Turkish government and the European Commission declared the need to implement a “positive agenda” to push the negotiations¹⁴. Difficulties are amplified in a political setting of growing nationalist pressures in both Turkey and the EU, and an unstable macroeconomic climate. Closing positions are also constrained by the substantial differences that still exist in approaches to agricultural policy and rural development.

Most EU member states and Turkey consider agriculture as a strategic sector to insure food security, and Turkey tends to aim to self-sufficiency. Both sides' policy tools remain different¹⁵. Most agricultural programmes in Turkey incorporate production distortions through compensatory payments and subsidies to mass production. Interestingly, in 2001, Turkey introduced direct payments that resembled the single pay-

12. Curiously, on 14 December, the European Parliament refused to renew its fishing agreement with Morocco because the Moroccans failed to take the interests of the people of Western Sahara into account, damaging Spanish boats fishing in Moroccan waters.

13. European Parliament, EP News, “Green light for EU-Morocco trade deal”, Reference: 20120216IPR38354, 16.02.2012.

14. See Stefan Füle, Speech at the chapter 23 Kick-Off Meeting with Turkey, Ankara, 17.05.2012.

15. See WTO, Trade Policy Review: Turkey, World Trade Organization, Trade Policy Review Body, WT/TPR/S/259, 17 January 2012. Chapter IV (1) Agriculture.

ment scheme or uniform payment per hectare but their implementation was abandoned in 2009. So the policy evolution has been contradictory to that of the reformed CAP, which introduced the single payment in 2003. In addition, some state enterprises in Turkey, such as TMO, continue to intervene in the market to buy wheat (18% market share in 2007-2010), barley (17%) and corn (19%).

“SUBSTANTIAL DIFFERENCES STILL EXIST IN EU AND TURKISH APPROACHES TO AGRICULTURAL POLICY AND RURAL DEVELOPMENT”

The interventionist approach of agricultural policy in Turkey is a special case in the OECD area. According to this organisation, almost all transfers to agriculture remain based on support mechanisms related to production and at market prices. Green box payments (in the WTO terminology) are virtually non-existent¹⁶.

Accession is expected to cause a significant impact on agricultural systems in certain geographic areas¹⁷, forecasting a significant drop in the levels of protection for potatoes, table grapes, sunflower, corn and barley. These falls could be softened in the context of future international markets, with an expected rise in prices of livestock products. Although the costs of membership may be attenuated by a gradual transition, the family farm model is threatened, which is a common challenge in both the EU-27 and Turkey. Farm structures are atomised and over 90% of holdings do not exceed 20 hectares, with an average farm size of 6 hectares.

EU Membership will be a challenge for small producers, who will have to adapt not only to a new type of consumer or concentrated distribution, but also to the food safety standards in force in the Union. The integration of producers into cooperatives and other types of organisations varies by sector, with examples of cooperative unions as Marmarabirlik Taris and the olive oil sector, and less success in the fruit and vegetable sector.

Turkey is gradually incorporating the rural development philosophy, as understood in the EU¹⁸. Traditionally, rural development policy has been addressed in the context of development plans, under the concept of integrated rural development emphasizing on infrastructure projects and participation of various international agencies (e.g. the Southern Anatolia Project). In recent years, rural development policy objectives have incorporated income diversification (for example, rural tourism), improving human capabilities and environmental preservation¹⁹. The harmonisation of rural development approach is being addressed through the IPARD (pre-accession programme assistance) that establishes measures for the period 2007 to 2013, with a focus on improving conditions for small farms on the basis of improved productivity in key sectors that need support to adapt to EU standards (meat and dairy products, fruits and vegetables and fish). The measures, partly financed by the EU, provide investment aid to modernise the production, processing and marketing of agricultural products, the organisation of producer groups and economic diversification.

There is a significant field for cooperation, especially targeted to the environment, rural diversification, the approach to local development and the implementation of an institutional system of administration of the incentive programmes to rural development.

16. OECD, *Agricultural Policies in OECD Countries and Emerging Economies*, Part II, Paris, 2011.

17. M. van Leeuwen, P. Salamon, T. Fellmann, A. Koc, G. Boluk, A. Tabeau, R. Esposti, A. Bonfiglio, A. Lobianco and K. Hanrahan, *Potential impacts on agricultural commodity markets of an EU enlargement to Turkey*, European Commission, Joint Research Centre, Institute for Prospective Technological Studies, JRC 60663 EUR 24772 EN – 2011.

18. European Commission, *Commission Staff Working Document, Turkey 2011 Progress Report*, SEC(2011) 1201 (Accompanying the Communication from the Commission to the European Parliament and the Council, *Enlargement Strategy and Main Challenges 2011-2012*, COM(2011) 666, 12.10.2011. Significant progress was made in July 2011 with the accreditation of the Agriculture and Rural Development Support Institute (ARDSI), to manage IPARD and 20 regional units.

19. See Ninth Development Plan (2007-2013), Agriculture Strategy Paper (2006-2010), Agriculture Law (2006), National Rural Development Strategy (2007-2013), Rural Development Plan (2010-2013), IPARD Programme (2007-2013).

2. Agricultural issues and Trade Agreements in EU-Med Relations

This part gives a general overview of consequences of trade agreements on agriculture on both sides of the Mediterranean Sea. Then it explains what expectations actors may have considering those agreements.

2.1. Conflicting views of trade agreements

“ALL THE FTAS GIVE ROOM TO RELEVANT QUESTIONS ABOUT THEIR IMPACT”

The Euro-Mediterranean relations are special but **conflicting**. From the long and dramatic Arab-Israeli conflict to the trade liberalisation issues, too many fronts make it nearly impossible to find a stable and peaceful framework in the region. In the trade field, all the FTAs give room to relevant questions about their impact on the countries concerned and on the rest of the world. There are three main points of view on the FTAs:

- against them, because they are an economically inefficient mechanism that also undermine the multilateral trading system;
- in favour of them, because they could be a means to build freer trade and to promote domestic economic reforms and multilateral trade liberalisation;
- against them, with the arguments shared by those groups that are opposed to trade liberalisation.

These arguments, mainly focused on the impact on firms and workers in import-sensitive sectors, also consider the impact on the environment, on the sovereignty of MENA countries due to the supposed “colonialist” approach. In the field of agriculture, critics argument that the FTA hampers small-scale farmers, who represent the majority of the poor in rural areas. Moreover, FTAs are presented by anti-globalisation movements as tools through which developed countries transfer their economic values into developing or underdeveloped countries. The outcome is that FTAs end up destroying farmers’ livelihoods and threaten countries food self-sufficiency and food security in a time of global food crisis.

In fact, the distribution of trade gains is not likely to be even as they do not lead necessarily to greater wealth for each participant. Instead, it results in winners and losers within concerned countries, and these can be regions, sectors, consumers, workers (job losses) or firms²⁰. If a trade agreement is efficient, it generates enough wealth so that the winners can compensate the losers and increase the global wealth. Without compensating mechanisms from winners’ gains it is more difficult to avoid the opposition of the losers.

2.2. Agri-trade in EU-Med relations: a sensitive issue

As almost every trade agreement, agriculture is a sensitive issue in the EU Med relations. Agriculture stands out as a strategic sector of the societies and economies of the Mediterranean basin due to five major headings: demographic trends, the vulnerability of agricultural trade, rural development issues, the environmental challenge, and the questions of food security and safety. Agriculture remains a major determinant of the national economies of the southern shore countries.

Most agricultural trade between the EU and its partners in the region is already liberalised: MENA countries benefit from duty free or duty reduction for more than 80 per cent of their agricultural products to the EU. Reciprocally, one third of EU exports of agricultural products benefits from preferential treatment in the Mediterranean countries.

20. WTO, World Trade Report 2008: Trade in a globalizing world.

“MOST AGRICULTURAL
TRADE BETWEEN THE EU
AND ITS PARTNERS IN
THE REGION IS ALREADY
LIBERALISED”

There are a great number of reports, studies and papers devoted to the assessment of the effects of Euromed Agreements, including aspects of agricultural trade liberalisation. Some of them are sponsored by the EU linked to research projects²¹ or come from institutions devoted to EU external relations or from international organisations (v.gr. Go Euromed, IEMED, CSER/CEPS, CEPR, CIHEAM, IMF, Case, Eu-Med Agpol project and the Sustainable Impact Assessment (SIA) conducted by the European Commission).

These works draw the attention to the following issues:

- Aggregate liberalisation impacts in fruits, vegetables, and olive oil are expected to be small, but concentrated in certain EU regions and producers. They would face difficulties to compete with their Mediterranean neighbours. These regions are among the least advanced or most disadvantaged in Europe, such as Andalusia and Canary Island (Spain), Thessaly (Greece), Calabria (Italy) and North Douro (Portugal).
- As the aggregate specific losses would not be very large, implementation measures of compensation for the losers of the process should be easy, but they are not taken into account.
- Consumers of MENA should gain significantly from cheaper food prices, particularly prices of cereals and cereal-based food products.
- Small producers in the southern Mediterranean – mainly of continental production – would directly suffer from the opening of borders due to their inability to compete with the European Union (and United States) continental production.
- Linked to liberalisation, the increase of activities and urbanisation in coastal areas, the intensification of agriculture and fisheries, the improved transport and energy infrastructure, including new installations for the production of renewable energy, will increase pressures on natural resources and on biodiversity.
- Environment and workers' rights issues are not included into the agreements.
- Current healthy consumption patterns relating to the Mediterranean diet could be negatively impacted and Northern consumer habits, production processes and mobility patterns could be exported with social and environmental impacts.

2.3. Non-linear effects of FTA on EU-MENA agri-trade

Some interesting trade facts help to clarify and assess the impacts of agreements.

Globally, the Barcelona process **has not deepened** EU-MENA trade. The progress in expanding trade, fostering investment in the region, and accelerating the convergence in living standards was limited and did not live up to the expectations the initiative raised when it was launched in November 1995.

Only the agreement with Turkey has economically and statically significant positive effects on imports and exports. Regarding South-South agreements, Agadir agreement had a positive (but not significant) effect on increasing trade between country partners. This has not been the case of the agreement with Turkey.

21. For instance, through the 6th FP, the Commission has supported several research projects aiming to provide policy tools to assess regional and multilateral trade integration, within the Euro-Med partnership.

Mediterranean products such as fruit and vegetables, olive oil and wine have been presented as substantially affected by trade liberalisation in the EU, given the specialisation of agricultural exports by Morocco, Israel, Turkey, and Egypt²².

**“GLOBALLY, THE
BARCELONA PROCESS HAS
NOT DEEPEDED
EU-MENA TRADE”**

With the whole of the MENA, between 2006 and 2011, the trade balance – global and agri-food – has always been positive to the EU²³, and the gap has steadily increased, showing an **increased European competitiveness**. Exports almost double between 2006 and 2011, from 4.9 to 9.6 billion euros, while the European imports stayed between 3.1 and 3.5 billion euros.

Turkey has lost share in the EU-27 imports to the EU of Med products (fruit and vegetables, olive oil and wine) between 2000 and 2011 (15% on average for the whole period) while **Morocco has gained slightly** (21.1% on average). But the situation **depends on products**, with some increasing and other decreasing its **share in EU's imports** in both countries (*see Table 2*)²⁴.

Table 2. Turkey and Morocco's Mediterranean products exports to the EU-27 (2000-2011)

MEDITERRANEAN PRODUCTS WINNING (+) AND LOSING (-) SHARE IN EU'S IMPORTS			
MOROCCO		TURKEY	
+	-	+	-
lettuce, green beans, artichokes, courgettes, table grapes, watermelons, melon, peaches and nectarines, olive oil	tomato, garlic, cucumbers, orange, clementines, apricots, strawberries, wine	strawberries, cucumbers, apricots	tomato, cherries, garlic, lettuce, green beans, artichoke, courgette, oranges, clementines, table grapes, water melon, melon, apples, peaches, nectarines, olive oil, wine

Source: Own elaboration based on COMEXT

- The export behaviour of **Turkey seems to show a reallocation of agricultural exports towards other markets**, such as Russia and other European East countries. Only 2 EU member states (Germany and UK) are amongst its top ten foreign export markets for fruit and vegetables.
- Both countries have lost market share for **citrus**, where it seems clear that EU is winning domestic competitiveness. In 2010/11, Russia overtook the lead from the European Union (EU) as the main destination market for Turkey's citrus exports, absorbing about 50 per cent of Morocco's fresh citrus exports, while the EU market accounted for 37 per cent²⁵. Something similar happens to Morocco's exports to Russia, although in this case the reasons could be the difficulties they have been facing to comply with increasingly stringent EU standards and requirements as well as the incentives that the government is providing when exporting to non EU countries.
- In the **citrus** sector, EU trade preferences are not really effective as entry-prices were fixed initially at a very low level allowing Moroccan exporters to enjoy preferential access to the EU market. However, they have not been able to fulfil the duty-free quota for clementine and oranges (for the period 2007-2008/2011-2012, a maximum of 68% for clementines in 2009/2010, *see Table 3*). In fact, in the last 2011/2012 season, Spanish's citrus exports have broken their former record (about 3.8 million Tm).

22. Over the last decade the EU has constantly recorded a trade deficit in fresh and processed fruit and vegetables, totalling €9.8 billion in 2011. The deficit grows to €11.9 billion if trade in nuts is included.

23. It is only negative for the EU-27 in the case of Algeria and Siria – for global trade.

24. It could be seen paradoxical that some of the Morocco's export products with negative performance are considered sensitive in the new Agreement 2012 (year base 2008).

25. This is compared to a reverse situation in 2009-2010 when EU imported about 45% of Morocco's total citrus exports, while Russia imported 40%.

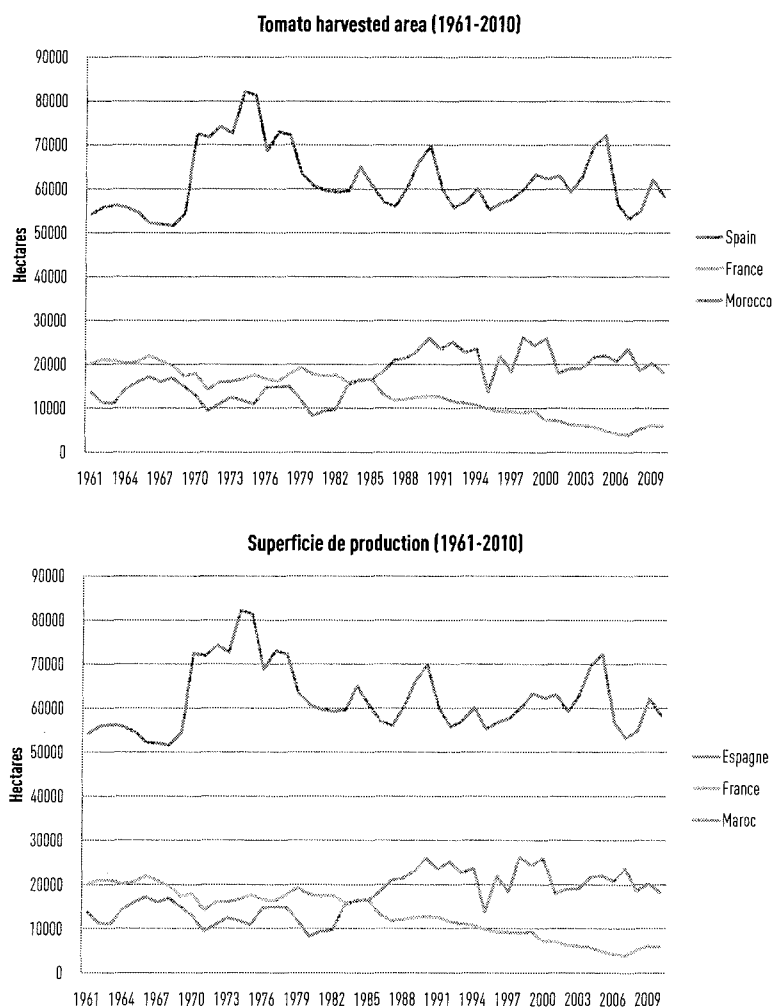
Table 3. Contingent's use (Tm)

	CLEMENTINES				
	2007-08	2008-09	2009-10	2010-11	2011-12
Quantity available	72,862	74,483	45,650	78,435	80,019
Utilisation	70,838	69,217	98,050	65,265	63,681
Rates	49%	48%	68%	45%	44%
	ORANGES				
	2007-08	2008-09	2009-10	2010-11	2011-12
Quantity available	193,836	221,238	230,063	228,410	258,500
Utilisation	112,964	85,562	76,737	78,390	48,300
Rates	37%	28%	25%	26%	16%

Source: European Commission, Aspam

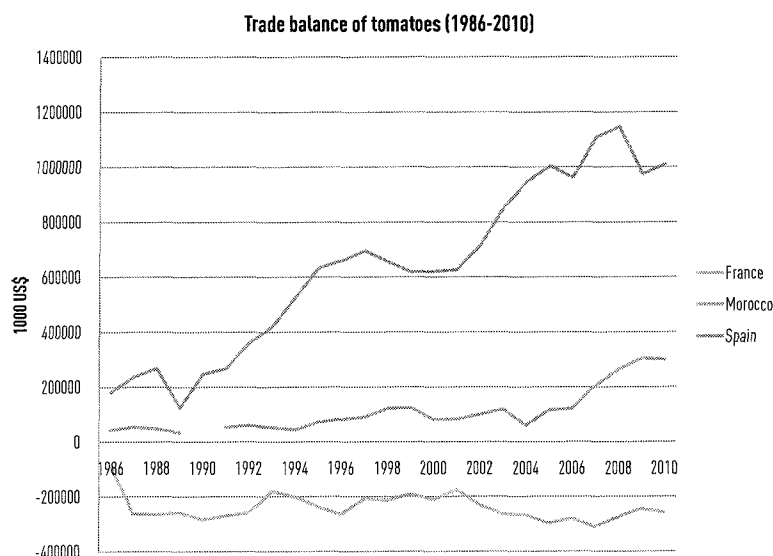
- Morocco and Spain are the two great Mediterranean **tomato** players, due to decline of French production (Figure 2). Amongst the two, Spain shows the best global performance in the last two decades although its growth has slowed in the last three years while Morocco's continued to increasing its exports (Figure 3).

Figure 2. Spain, France and Morocco tomato production and area



Source: Own elaboration based on FAOSTAT.

Figure 3. The trade balance of tomatoes



Source: Own elaboration based on FAOSTAT.

What can be expected from the new Agreements? The answer depends partly on the capacity of MENA countries to take advantage of the new opportunities. This is related to their capacity to overcome domestic weaknesses.

3. Agricultural and Rural Cooperation in EU-Med relations

3.1. Institutional cooperation

3.1.1. Before the Arab Spring

Cooperation will be needed even more in the future and is a key element of the relation between North and South. In fact, the Mediterranean EU policy has always had cooperation instruments complementary to trade agreements. For instance, the **MEDA** (adopted in July 1996) programmes were the main EU financial instrument for the Euro-Mediterranean Partnership until 2006²⁶. Among others, they could support **sustainable socio-economic development measures**, as harmonious and integrated rural and agricultural development.

From 2007 onwards, the MEDA (and TACIS) programmes were replaced by the **European Neighbourhood and Partnership Instrument (ENPI)**. It has a more flexible, policy-driven instrument, designed to target sustainable development and approximation to EU policies and standards supporting the agreed priorities in the **ENP Action Plans** and/or the Association Agreement²⁷.

In particular, the **EU/Morocco Action Plan** (2004), which reflects the Moroccan Government's priorities, entails reforms in the agriculture sector to ensure the introduction of a coherent agricultural policy (including

26. The budgetary resources allocated under MEDA were €3.4 billion for 1995–1999 and €5.4 billion for 2000–2006.

27. Funds allocated to individual country programmes will depend on their needs and absorption capacity as well as their implementation of agreed reforms. International financial institutions such as the European Investment Bank are also active in funding some actions in the Mediterranean region. The creation in 2002 of the facility for Euro-Mediterranean investment and partnership (FEMIP) boosted the EIB's activities in the Mediterranean.

sustainable rural development measures and product quality policy). It aims to fulfil conditions to finalise Morocco-EU free trade area²⁸. Moreover, Morocco has improved sanitary and phytosanitary rules, controls and equipment through support of TAIEX EU funded programme.

The **Regional Strategy Paper (RSP)** and the **Regional Indicative Programme** 2007-2013 provide the strategic framework for programming the regional Mediterranean allocation of the European Neighbourhood and Partnership Instrument (ENPI) for the Southern Mediterranean and Middle East. The RSP in this way complements the **Country Strategy Papers (CSP)** drawn up for Algeria, the Palestinian Authority, Egypt, Israel, Jordan, Lebanon, Morocco, Syria and Tunisia. The SCP for Morocco 2007-2013 and the **National Indicative Programme** 2011-2013 identify rural development and reduction of regional disparities as a common point of interest.

However it is necessary to keep a sense of moderation. Cooperation programmes often offer dozen of millions euros which are of course most welcome. Community farmers benefit from a support amounting to dozen of billion euros.

3.1.2. Since the Arab Spring

ENPARD IS PART OF THE
RENEWED ENP WHICH PUTS
AGRICULTURE AT THE CENTRE OF
THE RELATIONSHIP WITH THE
MEDITERRANEAN NEIGHBOURS

The last EU initiative in terms of Med cooperation is the **European Neighbouring Programme for Agriculture and Rural Development (ENPARD)**²⁹, running from 2014 to 2020. It is a new initiative, as part of the EU response to the Arab Spring under the renewed European Neighbourhood Policy which puts agriculture at the centre of the relationship with the Mediterranean neighbours. It recognises the key role of agriculture in terms of food security, sustainable production and rural employment and tries to respond to the challenge of modernising agriculture and rural areas in their countries³⁰.

ENPARD has 2 Axes and a horizontal instrument support: Axis 1 to improve Agricultural Productivity, Market Efficiency and Food Safety and Quality Standards; Axis 2 to develop the Rural Economy (Diversification, infrastructure) and horizontal capacity building support based, among others, on member states expertise (including Twinning, TAIEX).

The EU offers a dialogue on ENPARD to all partner countries to share EU experience in reforming agriculture and rural areas also in pre-accession countries, to assist partner countries in preparing and implementing long-term agricultural and rural development strategies with all the relevant stakeholders, and to build necessary institutional capacities at national and local levels. Participants are Algeria, Armenia, Azerbaijan, Belarus, Croatia, Israel, Jordan, Lebanon, Libya, Moldova, Morocco, Occupied Palestinian Territories, Tunisia and Ukraine³¹. The EU's references for all these programmes are **SAPARD** (Special Accession Programme for Agriculture and Rural Development) and **IPARD** (Instrument for Pre-Accession Assistance for Rural Development) programmes, which yielded significant results during the pre-accession phase.

Until now, because of their economic and social importance, cooperation funds have not enough privileged agricultural and rural issues in the MENA. Only a fraction of MEDA funds was devoted to rural development projects; agriculture and rural development activities were eventually eliminated from the package of priority projects to be pursued under the new Union for the Mediterranean in July 2008. The European experience, such as the **Leader programmes**, can bring important and useful lessons for MENA, particularly regarding the mobilisation of social forces and resources at the local level. A few years ago, the idea of launching a Leader

²⁸. This include the dissemination and exchange of information on agricultural policies, the transfer of know-how and experience, the improvement of agricultural structures and marketing chains, the diversification of rural economic activities, the development and promotion of quality products, the incentives to private-sector investment, research on improvements in productivity and quality, the introduction of socio-economic measures to accompany the reforms, the support to the introduction of sectoral agricultural policy and support land tenure reform.

²⁹. ENPARD was established by two joint Communications of the European Commission and the European External Action service of March and May 2011.

³⁰. The ENPARD's objectives are to improve farmers' revenue and rural employment, in particular among young people; to increase the productivity of production systems, improving at the same time the quality of products and the capacity to adapt to changes towards food price volatility; to reinforce organisational and institutional capacities and adherence to the operational principles of good governance, better capacity to avoid unsustainable production patterns, water scarcity, soil loss.

³¹. The first phase (2012-2014) counts with four pilots countries are Morocco, Tunisia, Egypt and Jordan. ENPARD Financing in the start-up phase (2012-2013) comes from existing budgetary lines under ENPI, topped up with SPRING funds for some countries, TAIEX and twinning assistance.

Med project, patterned on the European experience, conceived within and promoted by CIHEAM, received significant attention and encouragement. Unfortunately, nothing came out of it³². The democratic renewal following the Arab Spring could change the situation.

Similarly, there would be much scope for closer collaboration in the field of **agricultural research and higher education**. It's widely needed in MENAs since there is a huge potential for improvements through enhanced cooperation, following proven procedures and modes of operation³³. But again, this sphere of activities does not receive much attention by policymakers³⁴. Finally, much more could be done by the private sector, particularly in terms of **Foreign Direct Investments (FDI)**³⁵ and adaptation to public and private norms to be respected for accessing to the European market. Here again, there are enough successful experiences and the conditions for success are known. Private firms need to find the proper economic incentives to invest and this, to a large extent, depends first on appropriate public policies within MENAs. In addition, EU policy makers can also help by providing a predictable trade environment and through support to various public-private partnerships.

3.1.2.1. The Moroccan case

“ MOROCCO IS GRANTED THE ADVANCED STATUS, PLACING IT IN THE VANGUARD OF THE ENP, OF WHICH IS HE THE MAIN RECIPIENT OF FUNDING”

Morocco is the recipient of the **largest amount of funding**, under the European Neighbourhood Policy, with 654 million euros (in 2007-2010) and an indicative budget of 580 million euros for the period 2011 to 2013. On 13 October 2008, Morocco became the first country in the Southern Mediterranean region to be granted the advanced status, placing it in the vanguard of the Neighbourhood Policy. This involves, among other things, an integration of the single market on the basis of gradual adoption of the Community acquis and sectorial cooperation³⁶.

Currently, EU cooperation with Morocco is mostly delivered through direct financial support to the general budget of Morocco for supporting national sector reforms. In addition to the support of agriculture sectoral policy³⁷, the development of poor rural communities in Morocco must be enhanced³⁸. In addition to this indirect funding, the EU funds finance programmes specifically categorised as rural development. These are, for instance, the national plan for rural roads, opening up roads in isolated parts of the country or the integrated development in rural Northern provinces (19 million euros – to start in 2011) of remote communities of the Al Hoceima region.

3.1.2.2. The Turkish case

As candidate country, **Turkey** participates in several European programmes such as the Instrument for Pre-Accession Assistance (**IPA**) – a financial aid **for enhancing regional competitiveness and productive environment or human resources development and rural development**³⁹ –; EU innovation and research funding (FP7) – where applications are possible by research entities from non EU member states⁴⁰ –,

32. Probably, rural poverty issues were not a top priority for MENA governments and, as a result, for Euro-Mediterranean collaboration.

33. MEDFROL project to analyse agricultural policy and macroeconomics in the 11 non-EU Mediterranean countries: Turkey, Morocco, Algeria, Tunisia, Egypt, Lebanon, Libya, Syria, Israel, Gaza Strip and West Bank, and Jordan. It will compare the fruit/vegetable and olive oil sectors in these regions with EU countries that produce similar products. It aims to recommend future EU policy and evaluate the consequences of a freer trade regime on the Union as a whole and these member states in particular. It will maintain close links with the related EU-MED AGPOL project.

34. It is worth noting that Morocco participates or participated to European projects: TEMPUS and Research projects.

35. European investments are important, mainly those coming from France to Morocco.

36. Although the association agreement with the EU falls significantly short of the US trade deal within the sphere of agro-food trade.

37. The current Support Programme to Agriculture Sectoral Policy (70 million euros), the forthcoming Support Programme to Agriculture Sectoral Policy (60 million euros) and the Support Programme to the National Strategy of Agriculture Consulting (10 million euros).

38. Currently ongoing examples of such programmes are support to education (93 million euros), literacy (27 million euros), health (86 million euros) and gender equality (35 million euros) (EC geographical coordination for Morocco, 2011).

39. IPA assistance to Turkey is implemented under decentralised management according to the five IPA components available to candidate countries and builds on assistance provided to Turkey under the previous financial instruments, the MEDA programme (1996-2001) and the Turkey pre-accession assistance instrument (2002-2006). Read the IPARD programme (2007-2013).

40. The non-EU countries are associated and thus can fully participate in FP7 under the same conditions as EU countries: Switzerland, Israel, Norway, Iceland, Liechtenstein, Turkey, Croatia, the Former Yugoslav Republic of Macedonia, Serbia, Albania or Montenegro.

and the Agricultural Research for Development (**ERA-ARD**). This research project promotes collaboration in fighting poverty and hunger, and addresses the agricultural and development challenges faced by developing countries, emerging countries and countries in transition.

3.2. Cooperation beyond institutions: the role of civil society

3.2.1. The role of civil society in Euro-Med cooperation

The field of cooperation goes beyond institutional programmes. We may agree with Paul Allières that *"cooperation is exercised primarily among functionaries and administrations and only far more rarely among politicians"*⁴¹. Allières does not even mention civil society. Writing as long ago as 1995, Bichara Khader wanted to *"get the debate out of the official forums by letting civil society have its say"*⁴².

Several efforts to do so have now been made. The Euromed Civil Forum, for instance, has been in existence since 1985, in its capacity as a *"non-institutional initiative for coordination and debate among civil society organisations in the Mediterranean basin"*. Anette Jünemann provides an excellent summary of the theoretical debate on the definition of the concept of "civil society" in her analysis of that Forum⁴³. According to the expression used by Sari Hanafi⁴⁴, it is a grouping of "civil society activists" chosen by northern NGOs, which also decide the agenda. This "colonial" perception experienced by southern players is confirmed by Sally Khalifa Isaac Atwan, who argues that *"colonial history has consistently fuelled a climate of lack of trust, particularly at times of cultural confrontation between the Muslim and European worlds"*⁴⁵.

THE OVERCOMING OF TENSION BETWEEN THE AGRICULTURAL PLAYERS ON BOTH SHORES OF THE MEDITERRANEAN DEMANDS COOPERATION BETWEEN ECONOMIC AGENTS"

The "Civil Society Facility", co-financing instrument of the Commission, has been launched to strengthen the capacity of civil society organisations and facilitate dialogue between the civil societies of the candidate countries and the EU. In the case of Turkey, 23 agriculture-related projects were approved in 2011.

These contacts and debates can, of course, be positive, but they do not appear to be capable of opening up a dialogue or of establishing mutual understanding among the players. However, as it is essential for the consolidation of the European project, the overcoming of tension between the agricultural players on both shores of the Mediterranean demands cooperation between economic agents in the sector through the strengthening of links and of interdependence.

3.2.2. Some successful initiatives in the field of agricultural and rural cooperation

As far as academic cooperation is concerned, the activities conducted by the International Centre for Advanced Mediterranean Agronomic Studies, or CIHEAM (founded in 1962) can be highlighted. This centre has played a very important role in establishing networks, not only among researchers but also among economic agents in agriculture on both shores of the Mediterranean. And its action has been further strengthened by the European Union. The European Commission's Directorate General for Research and Innovation organised a "Euro-Mediterranean Conference on Research and Innovation: a programme for a new partnership" in Barcelona in April 2012. Moreover, European research programmes make it possible to enhance research networks and to improve awareness and understanding of the development and agriculture⁴⁶ in the region.

In addition to the cases mentioned above, several positive examples of cooperation can be mentioned:

41. P. Allières, « Les régions du Sud et les programmes méditerranéens de l'Union européenne », *Pôle Sud*, n°3, 1995, pp 141-146.

42. B. Khader, "Le partenariat Euro-méditerranéen", *Working Paper*, n° 9523, 1995.

43. A. Jünemann, "The Forum Civil Euromed: critical watchdog and intercultural mediator", in S. Panefianco (coord.), *A new Euro-Mediterranean partnership cultural identity*, Franc Cass, London 2003.

44. S. Hanafi, "Civil society in the North-South relations. The case of the Euro-mediterranean partnership. A view from the South", *ORIENT*, Jg. 46, Vol. 3, 2005, pp. 414-428.

45. S. Khalifa Isaac Atwan, *The quest for intercultural dialogue in the Euro-mediterranean region: opportunities and challenges*, Robert Schuman Centre for Advanced Studies, 2010.

46. This is true of the Sustainmed FP7 project, for example.

- The *Comité de liaison de l'agrumiculture méditerranéenne (CLAM)*, which was first set up in 1950, is an association of leading citrus growers on the two shores of the Mediterranean and it is the oldest example of such cooperation in existence.
- The commercial tensions between Turkey and the European Union in the hazelnut market are now channelled via a joint committee on which economic agents have been meeting every year since 2006⁴⁷, a year of major crisis for this market.
- Moroccan tomato growers and Mediterranean citrus growers have been attending the meetings of the committees of experts which the Commission has been holding several times a year since 2004 in order to track market developments.
- Growers on both shores of the Mediterranean also hold more sporadic meetings, as they did for instance in Brussels in the mid-2000s thanks to an initiative organised by COPA-COGECA, and as they did in Almeria in 2007 thanks to an initiative adopted by the Spanish agricultural cooperatives.
- The International Olive Oil Council, even though it now includes Argentina, is a primary forum for the governments of the Mediterranean's olive and olive oil producing countries. It has set up a Social and Economic Committee to become a forum for civil society and economic agents in the industry.

In addition to these examples, there are also foreign investments in the agricultural sector in Mediterranean countries, with Morocco and Turkey topping the bill. Accurate figures are not easily available, but France appears to be the lead investor in Morocco with agriculture as a priority area. Spain is also a major investor in agriculture, in particular in the fruit and vegetable sector (which accounted for some 70% of its agricultural investments in 2004). In Turkey, foreign investment in agriculture accounted for only 0.2% of the total in 2010 and the number of new businesses setting up in agriculture, hunting and forestry has been growing constantly, shooting up from 131 in 2004 to 368 in 2009. Europeans are far and away the leading foreign investors in Turkey too, just as they are in Morocco.

3.2.3. Obstacles to cooperation among civil societies: overcoming the fear of competition from the south

This is not the first time that European agriculture, and its Mediterranean sector in particular, are facing a major challenge caused by the deregulation of trade⁴⁸. Back in 1985, the European Economic Community devised its so-called Integrated Mediterranean Programmes (IMP) to prepare Greece and the regions of southern Italy and southern France to face competition from the Iberian Peninsula. Each IMP consisted of a group of mutually complementary measures impacting the main sectors of the regional economy, such measures being binding on all of the players involved: the EEC and the state, regional and local authorities⁴⁹.

RECENT
DEVELOPMENTS (ARAB
SPRING AND CAP REFORM)
SHOULD GIVE RISE TO A
NEW DEBATE

This was the first attempt to devise coordinated action among the various European structural funds on the one hand, and the various authorities on the other, in an effort to alleviate the unfavourable impact of enlargement on those agricultural regions suffering direct competition from new members' produce. As Paul Allières points out, the IMPs "contributed to the development of the European rhetoric around the notion of local development and of the enhancement of proximity"⁵⁰.

⁴⁷. The last meeting was held in Istanbul on 23 September 2011. For the positive impact of this dialogue-based dynamic, see: "Hazelnut Dialogue Contributes to Turkey's EU Bid", *Today's Zaman*, 6.02.2012.

⁴⁸. J. Béréguez, « Les programmes intégrés méditerranéens : objectifs des PIM et perspectives pour l'agriculture en Ardèche, Drôme et Provence-Alpes-Côte d'Azur », *Revue de géographie de Lyon*, Vol. 61 n°4, 1986, pp. 441-459.

⁴⁹. Andy Smith, « La Commission européenne et les fonds structurels : vers un nouveau modèle d'action ? », *Revue française de science politique*, Volume 46, Numéro 3, pp. 474-495, 1996; Giuliano Bianchi, "The IMPs: A missed opportunity? An appraisal of the design and implementation of the integrated Mediterranean programmes", *Regional Politics and Policy*, Volume 2, Issue 1-2, 1992, pp. 47-70.

⁵⁰. Paul Allières, *op.cit.*

Recent developments on both shores of the Mediterranean should give rise to a new debate. On the one hand, the Arab Spring is fostering the conditions for a deeper and freer dialogue, while on the other, the proposals⁵¹ submitted by Commissioner Ciolos for reforming the CAP open up new prospects⁵², in as much as they strengthen the role played by producers and their associations while also bolstering the inter-branch associations' role⁵³. The tasks which the latter might carry out in the full range of agricultural chains under the new CAP include: planning production and tailoring it both to demand, in quantitative and qualitative terms, and to the stabilisation of agricultural prices; optimising production costs; furthering research and innovation; and handling promotion. One might even envisage cooperation with the Mediterranean counterparts in these spheres. In addition, producers on both shores of the Mediterranean are facing the same problems of imbalance in the distribution of added values among the players in the agri-food chain and of their products' loss of identity to the benefit of retailer brand names.

In view of this, why not envisage an association of producer organisations comprising Moroccan and European growers for tomatoes⁵⁴; 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 organisations?

**“ OBSTACLES FACES
BY THE MEDITERRANEAN
COUNTRIES RESEMBLE
THOSE ENCOUNTERED BY EU'S
NEW MEMBER STATES ”**

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. A strengthening of capabilities 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 experience⁵⁵.

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.

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.

⁵¹ For more information on those proposals, read European Commission, *The Common Agricultural Policy after 2013*.

⁵² D. Ciolos, "L'agriculture au cœur de la politique de voisinage", Speech/12/405, 31.05.2012.

⁵³ First and foremost, Articles 106, 107, 108 143, 144 and 145 in the Proposal for a regulation of the European Parliament and of the Council establishing a common organisation of the markets in agricultural products (Single CMO Regulation), COM(2011) 626 final/2, 19.10.2011.

⁵⁴ H. El Dahr, "Organisations de producteurs et offre alimentaire". In: *Mediterra 2012: Diète méditerranéenne pour un développement régional durable*, 2012.

⁵⁵ In an address to Confrontations Europe's European economic debates in 2011, Gérard Tubery presented the work being done by AGROPOL to promote producer organisations in Burkina Faso and in Mali and to develop the edible oils industry in Morocco; See also European Commission, *Proposal for a regulation of the European Parliament and of the Council on support for rural development by the European Agricultural Fund for Rural Development (EAFRD)*, COM(2011) 627 final/2, 19.10.2011.

CONCLUSIONS AND RECOMMENDATIONS

Some conclusions can be drawn from this Policy Paper, aiming to improve the agricultural relations between the North and the South and East of the Mediterranean.

1. The EU's policy towards MENA countries is evolving towards an ambivalent and complex framework which contains a mixed bilateral and regional approach oriented to global economic integration. The risk of this integration model - from a set of different bilateral agreements towards a regional and common aim - is discrimination between MENA countries and changes in trade's preferences that can distort trade.
2. Trade liberalisation is the key-stone of the EU-Med countries agreements, but free trade is not fully achieved due to some agricultural exceptions. Rightly so, agricultural liberalisation process is being gradual and asymmetrical in order to avoid strong negative impacts and to allow players to adapt to new rules. This partially explains why trade global effects are limited now.
3. Although FTA can create gains for the overall economy, it usually results in winners and losers within concerned countries; these can be regions, productive sectors, consumers, workers (job loss) or firms, given that that in all sectors trade liberalisation can undermines firms.
4. If a trade agreement is efficient, it generates enough wealth so that the winners can compensate the losers and increase the global wealth. Without winners' compensation, it is more difficult to avoid the opposition of the losers. Trade openness is easier to implement if simultaneous compensation is made for consequent losses.
5. If these costs are not taken into account in the political process, the risk of disaffection exists. It may be dangerous to let this sentiment grow, even more given the strategic role of the Mediterranean region for the EU, as the "*Rapport Rinaldi*" shows.
6. The MENA countries have a comparative advantage in typical Mediterranean products such as fresh fruits and vegetables, citrus, tomatoes and olive oil. The most important is cheap labour - in the case of Morocco and Spain, e.g. the salary rapport varies between 10 and 13 times - which leads to lower costs of production in MENA countries, although Morocco could improve its labour conditions if it would raise its productivity to support better social and environmental conditions.
7. Reducing the border protection against imports from these countries would entail losses for some growers, in particular in the EU Mediterranean regions, with very similar natural conditions to most South-East Mediterranean regions.
8. The situation varies among countries and products depending, mainly, of the share of labour in the total cost of production. In the case of citrus fruits, for instance, Morocco's and Turkey preferences and natural advantages have not been enough to erode Spanish's share in the EU market.
9. In the vegetables item, the casuistic is much more heterogeneous. In tomato and other vegetables, Spanish and French growers are already suffering from Morocco's competition. Until now, no persistent and dramatic effects have happened, in spite of certain seasonal peaks that temporally drive market prices down. At the same time, since 2001, Dutch tomato production has increased by 300.000 tons (equal to more or

less current total imports from Morocco), in particular during the winter period, traditionally reserved for Morocco and Spanish producers.

10. These results could change in the medium-term if Morocco plans to modernise its agricultural achieve their aims. However, the great challenge of the Green Plan Morocco is to become a real instrument of agricultural economic and social development, not widening the current duality of Moroccan agriculture, and the EU could help orienting its aids in that direction. Turkey has yet to fully harmonise its agricultural policies to the CAP approach.
11. Therefore, FTAs will redistribute the market share, but there is hope for all actors, in particular if producers are better organised, marketing is improved, quality is ensured and research and development are implemented.
12. To achieve an efficient output - some win, other standing at the end equal - and to manage constructively opposition's losers, the farmers adversely affected could be transitionally supported to improve their competitiveness, to adapt to the new market situation or to reconvert.
13. The EU has experience in programming for adaptation to new competition - as IMP, SAPARD and ISPAD. In the current difficult EU budget context, additional specific compensations seem non-realistic. In addition to the existing Structural Funds, the Globalisation Adjustment Fund could be used to compensate European farmers to support job creation and training in areas likely to be damaged by increased exports from MENA countries, as it has been proposed by the Commission in its financial perspectives 2014-2020. The most likely EU's budgetary scenario for 2014-2020, after the European Council held on February 2013 and waiting for the final decision by the European Parliament, indicates a reduction of financial support in real terms, and perhaps also in nominal terms, for EU and non-EU regions and producers.
14. The impact, at least on some MENA agricultural producers, is likely also to be significant. ENPARD should provide benefits, in particular in the fields of rural development, agricultural research, higher education and private partnerships, enhance capacity building where there is a large potential scope for deeper Euro-Mediterranean collaboration in food and agriculture. Programmes can strengthen networking among stakeholders, universities, research institutes and civil organisations working in rural and agricultural development. This could also be foreseen by the innovation programmes within Pillar 2 of a reformed CAP for 2014-2020. LEADER Initiative and SAPARD programmes can be useful tools to be implemented in the MENA countries.
15. Beyond the contents of the trade agreements, the European Commission has a responsibility in relation to the myths and global aggressive positions arisen during the last EU-Med agricultural liberalisation. There is, as it happens in other fields, a problem of communication of what the Commission competences are and how it is acting. For instance, the European regulation could certainly be improved and made clearer. But the control of the regulation, both the functioning of the entry price system and the phytosanitary controls are under the member states responsibility.
16. Sharing of information between the national authorities and coordination, has improved in recent years such as with the early advice system. But there is probably still a field for increase efficiency, cost sharing and more information exchange between the member states and with the Commission and the Morocco and Turkish competent services.
17. The Agreements include safeguard clauses. In practice, the most useful tool is the accelerate collaboration between the administrations in order to analyse quickly the crisis situation, share the diagnosis and look to possible solutions. In this process, the participation of private actors is made possible and should be encouraged.

18. As important as avoiding demagoguery is to recognise the proper magnitude of the challenges, to help the potential winners to transform the opportunities in facts and to support the potential losers in their adaptation process to the new situation. The shortcomings of the policy debates related to agricultural trade will lead to misconceptions and frustrations. This is why there are many reasons to promote the involvement of the civil society.
19. The current proposals for the Common agricultural policy post-2013 open interesting ways of collaboration. Producers' organisations (POs), associations of producers' organisations (APOs) and Interbranches will be promoted not only in the fruit and vegetable sector but also in others.
20. 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. These are two of the main goals of those organisations. Binational or regional committees can also be useful tools to promote cooperation. A great example is the next Spanish-Moroccan Tomato Committee, which could follow the line of the Spanish-French-Italian Joint Committee that helped reduce tensions among these countries.

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ANNEX: LIST OF ACRONYMS

CIHEAM	Centre international de hautes études agronomiques méditerranéennes
CLAM	Comité de liaison de l'agrumiculture méditerranéenne
COPA-COGECA	Committee of Professional Agricultural Organisations-General Confederation of Agricultural Cooperatives
CSP	Country Strategy Papers
DCFTA	Deep and Comprehensive Free Trade Agreement
EMFTA	Euro-Mediterranean Free Trade Area or Euromed FTA
EMP	Euro-Mediterranean Partnership (or Barcelona Process)
ENP	European Neighbourhood Policy
ENPARD	European Neighbourhood Programme for Agriculture and Rural
ENPI	European Neighbourhood Partnership Instrument
ERA-ARD	Agricultural Research for Development
EU	European Union
Euromed	Euro-Mediterranean Partnership countries
FTA	Free Trade Agreement
GDP	Gross Domestic Product
GMP	Green Morocco Plan
ISPA	Instrument for Structural Policies for Pre-Accession
IPA	Instrument for Pre-Accession
IPARD	Assistance Instrument for Pre-Accession Assistance for Rural Development
IOOC	International Olive Oil Council
LEADER	Liaison entre actions de développement de l'économie rurale
MEDA Regulation	Financial and technical measures to accompany the reform of economic and social structures in the framework of the Euro-Mediterranean partnership
MENA	Middle East and North African countries
IMP	Integrated Mediterranean Programmes
OECD	Organisation for Economic Co-operation and Development
PHARE	Poland and Hungary: Assistance for Restructuring their Economies
RSP	Regional Strategy Paper
SAPARD	Special Accession Programme for Agriculture and Rural Development
TACIS	Technical Assistance to the Commonwealth of Independent States
TAIEX	Technical Assistance and Information Exchange instrument
UfM	Union for the Mediterranean
WTO	World Trade Organization

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