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RECENT AGRICULTURAL POLICY DEVELOPMENTS IN THE CONTEXT OF THE EU APPROXIMATION PROCESS IN THE PRE-ACCESSION COUNTRIES

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SWG RRD

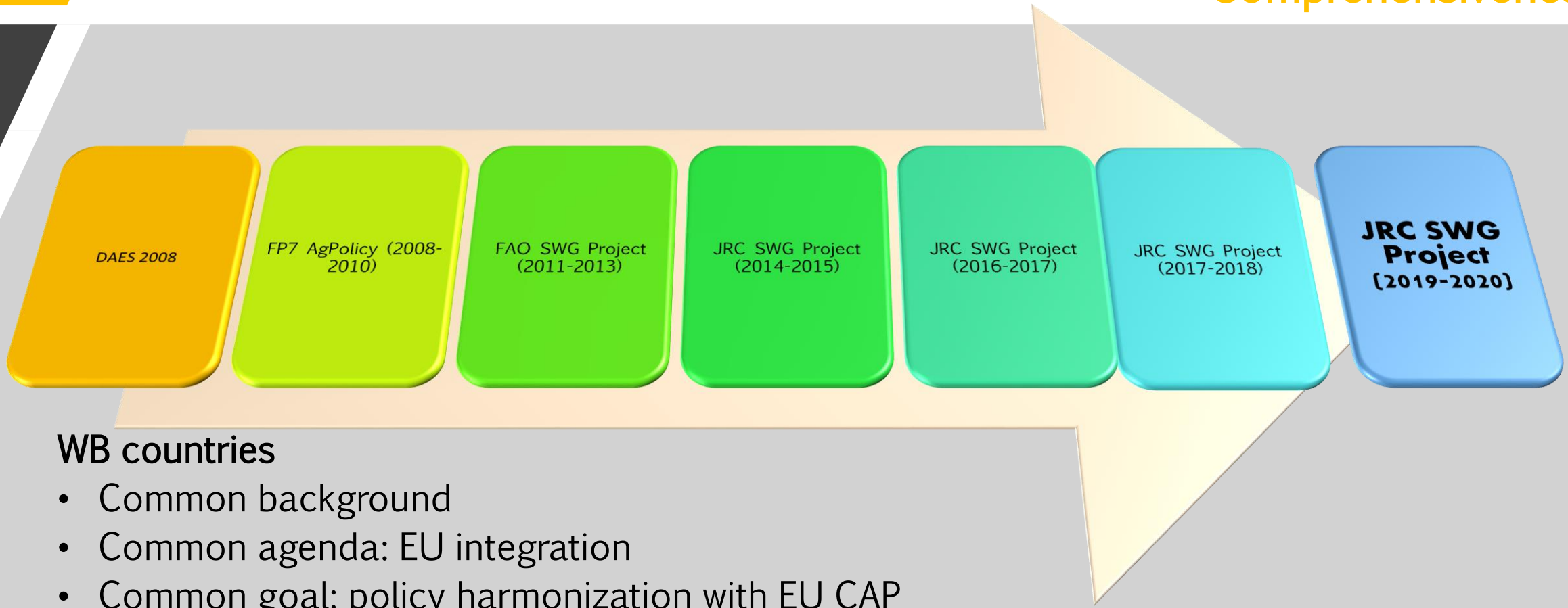
JOINT RESEARCH CENTRE

Content

- Background
  - Roadmap & Objectives,
  - EU agenda in WBCs and TR
- Data and method
  - Contributions & acknowledgements
- Results
  - Policy comparison and evaluation
  - Some context indicators
- Conclusion & Recommendation

Background - roadmap

- Continuity
- Comparability
- Comprehensiveness



WB countries

- Common background
- Common agenda: EU integration
- Common goal: policy harmonization with EU CAP
- Different agricultural policy setting

Background - objectives

*"Study on the research, innovation and technology transfer capacities and on the **recent agricultural policy developments in the context of the EU approximation process in the pre-accession countries**"*

New

- Turkey
- Socio-economic issues and RD Policy

OBJECTIVE:
to **collect information** and provide **country case studies** on agricultural policy developments in the WBs and Turkey, and to conduct **comparative cross-country analysis of the agricultural policies and their state of harmonisation with the CAP**

The EU Agenda in the WB and Turkey

Turkey (1999)
513.67 mill.
31,505 EUR

Legend
inhabitants
GDP per capita

North Macedonia (2005)
2.08 mill.
5,151 EUR

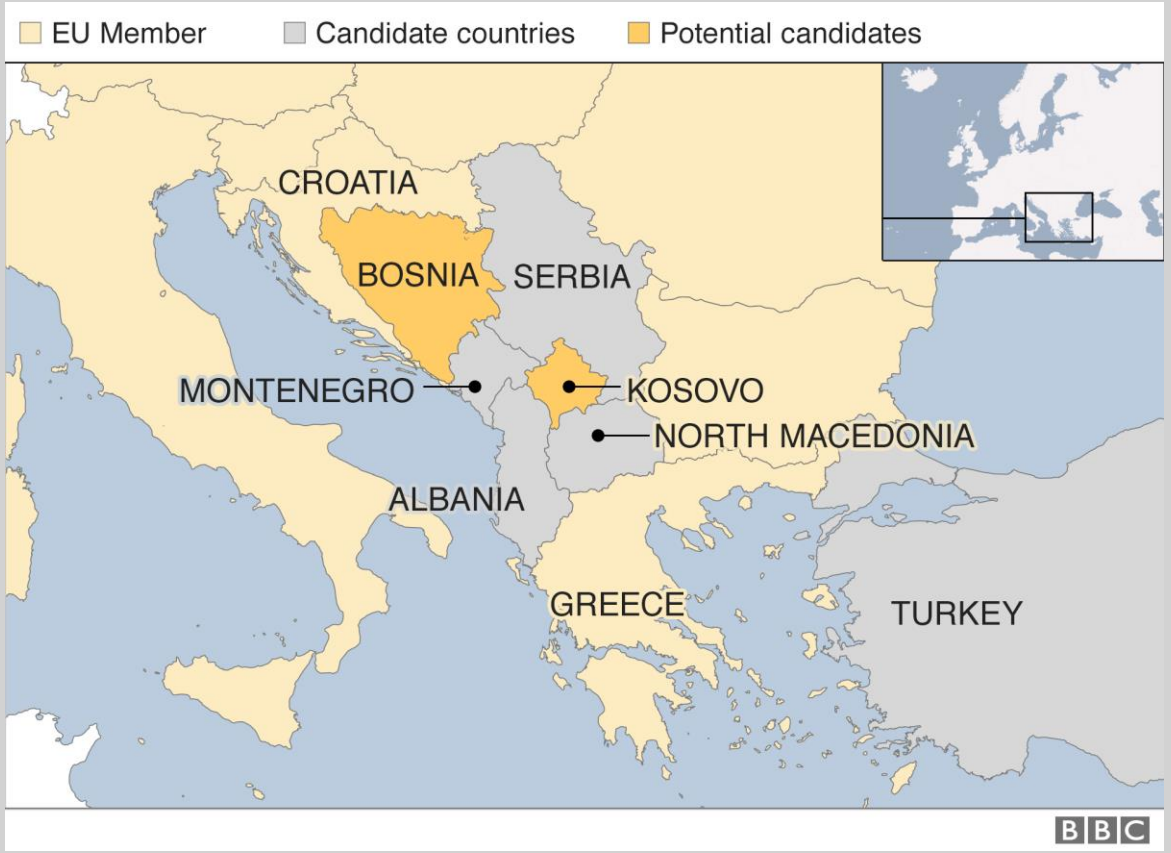
Albania (2010)
2.86 mill.
4,425 EUR

Montenegro (2010)
0.62 mill.
7,202 EUR

Serbia (2012)
6.99 mill.
6,104 EUR

Kosovo
1.80 mill.
3,656 EUR

Bosnia and Herzegovina
3.43 mill.
4,983 EUR



Data and method

- 7 Country reports

+

- Agricultural Statistics Database

+

- Agricultural Policy Measures Classification (AMPC) Database

+

- Conceptual framework

=

- Cross-country synthesis report

Volk, 2010, 2014, upgrated

Rednak, Volk, Erjavec, 2013

Erjavec, et al. 2020

Time series: 2010-2019

Focus of analysis 2017-2019 (average)

Key principles of the pre-accession **ag. policy framework:**

P1: Strategic policy framework

P2: Size and allocation of financial resources

P3: Direct producer support

P4: Measures to improve competitiveness

P5: Policy for sustainability and public goods provision by the farming sector

P6: Quality of life and employment

Contributions & *Acknowledgements*

- Tina Volk,
- Miro Rednak
- Emil Erjavec

Methodological and conceptual framework

- Aleksandra Martinovska Stojceska
- Ivana Janeska Stamenkoska
- Dragi Dimitrievski
- Ana Kotevska

Contribution in MK Country report and databases & the SYNTHESIS REPORT

Contributions in Country reports and Databases

- Edvin Zhllima (Albania)
- Sabahudin Bajramović (Bosnia and Herzegovina)
- Željko Vaško (Bosnia and Herzegovina)
- Mihone Kerroli (Kosovo)
- Mirsad Spahic (Montenegro)
- Vlado Kovacevic (Serbia)
- Ali Koç (Turkey)

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- SWG RRD
- JRC IPTS
- EC

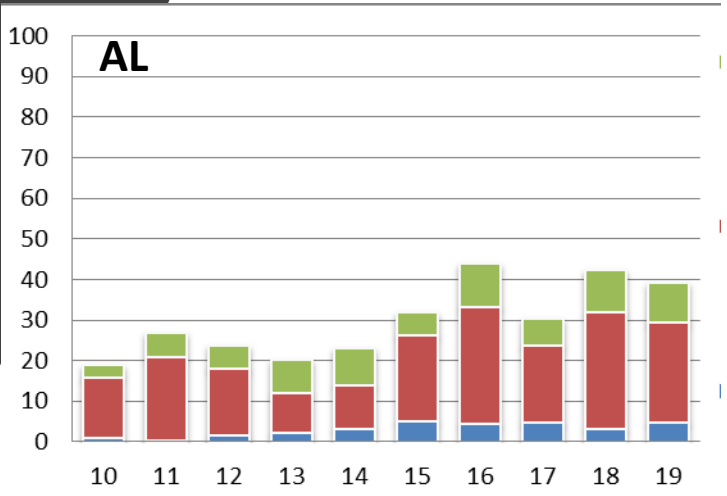
P1. Strategic planning framework

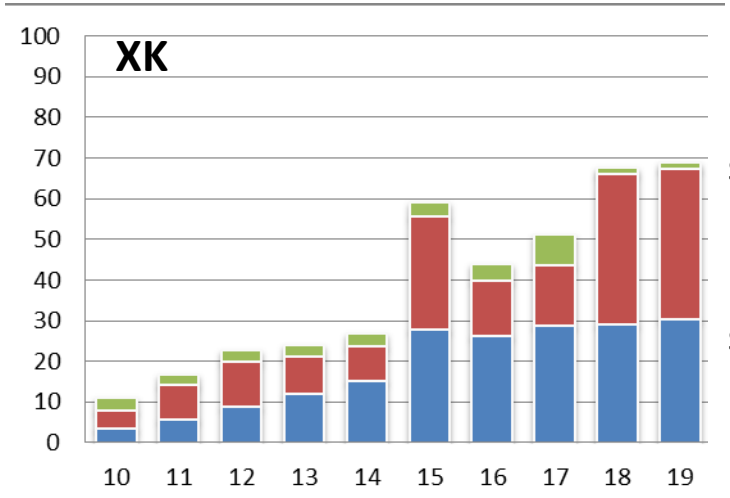
Adopted / Established …	
*…strategic planning / **policy cycle** of ag.policy?*	*/**
*…administrative **capacity**?*	*/**
*…policy **monitoring** and evaluation?*	*/**
*…**system** of analytical support for policy formation and implementation?*	-

Defining intervention needs by intervention logic of measures?

P2. Size and allocation of financial resources (1)

Total budgetary support to agriculture (mill. EUR)

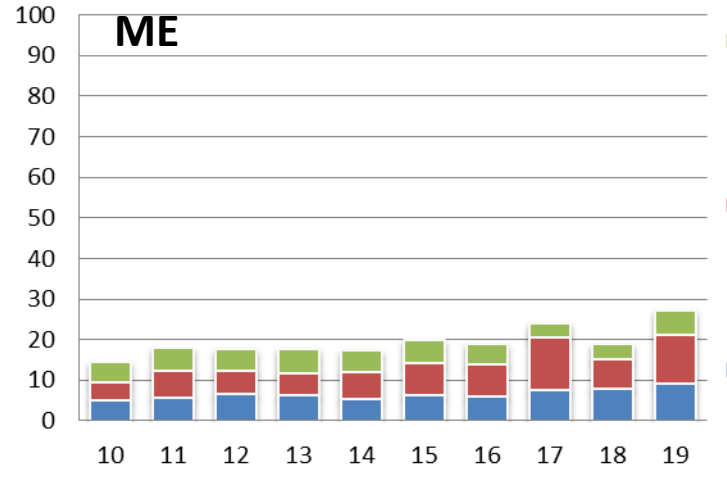


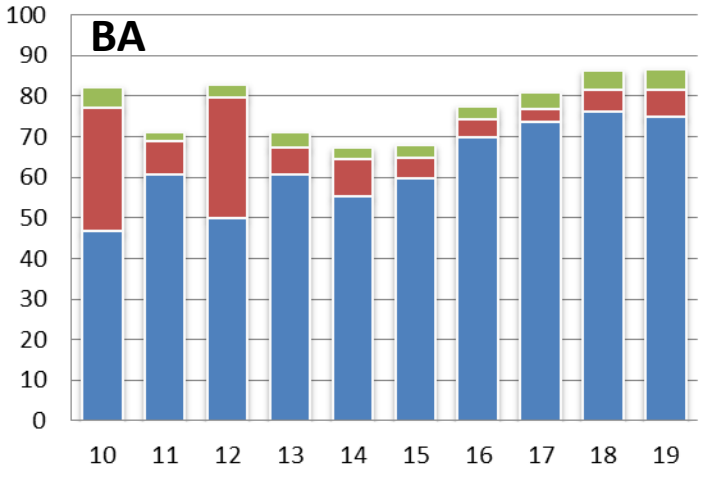


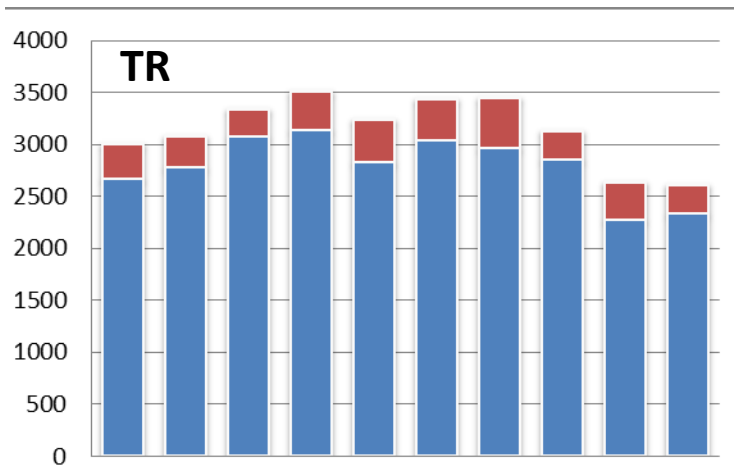
Note:

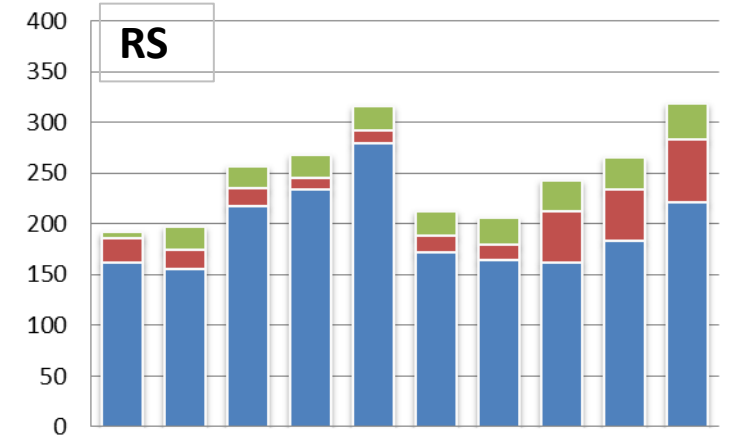
Left side graphs: scale up to 100 mill. EUR

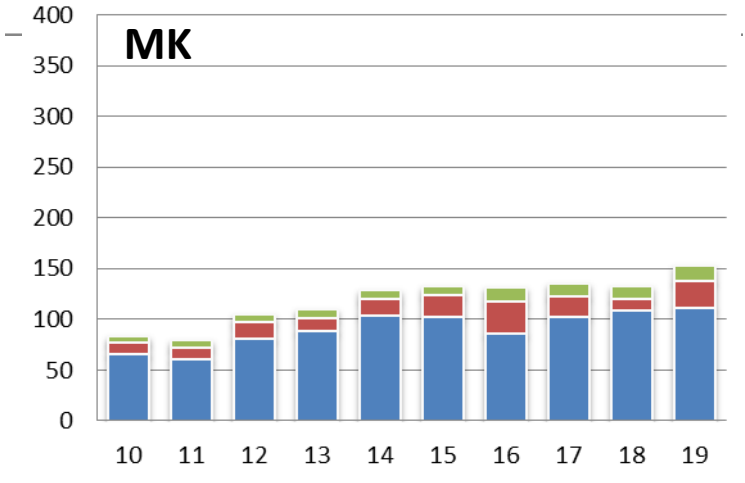
Right side graphs: scale up to 400 mill. EUR and 4000 mill. EUR (TR)



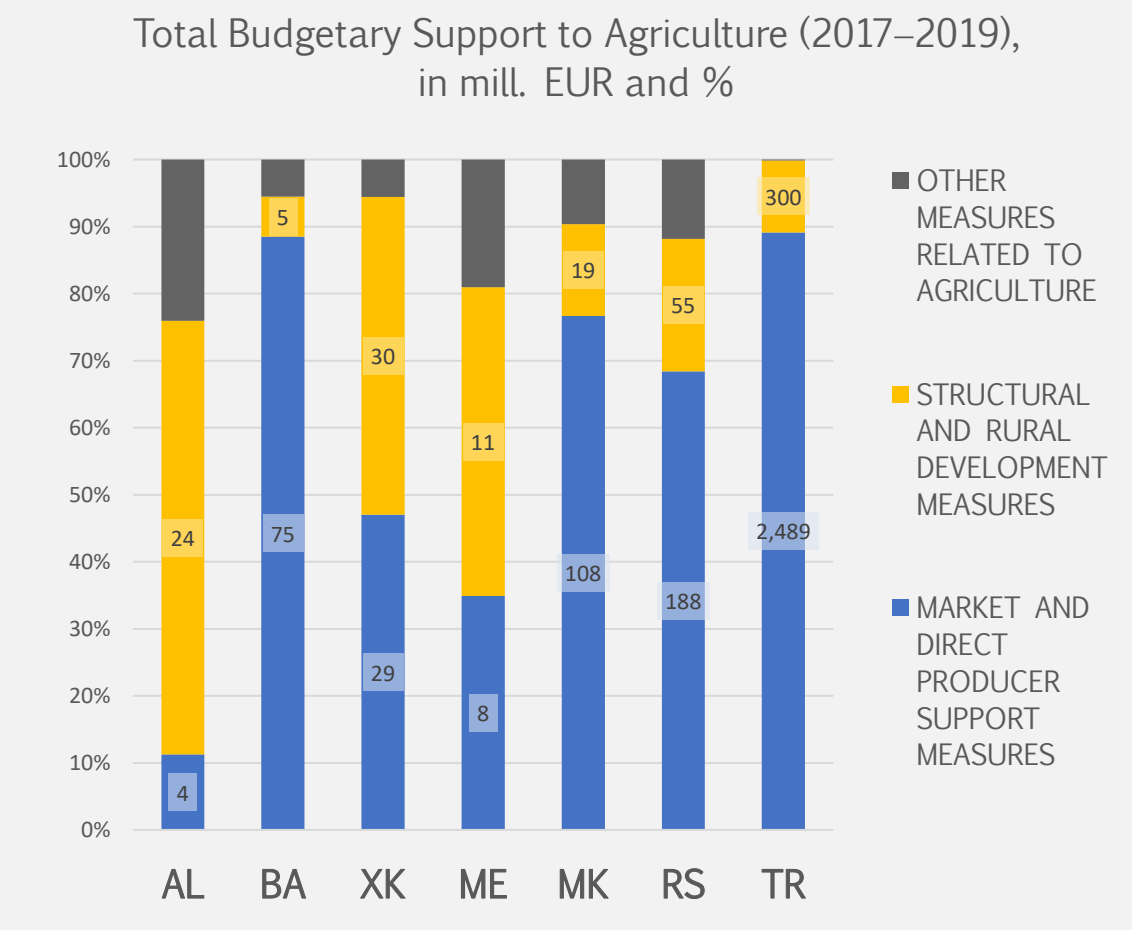


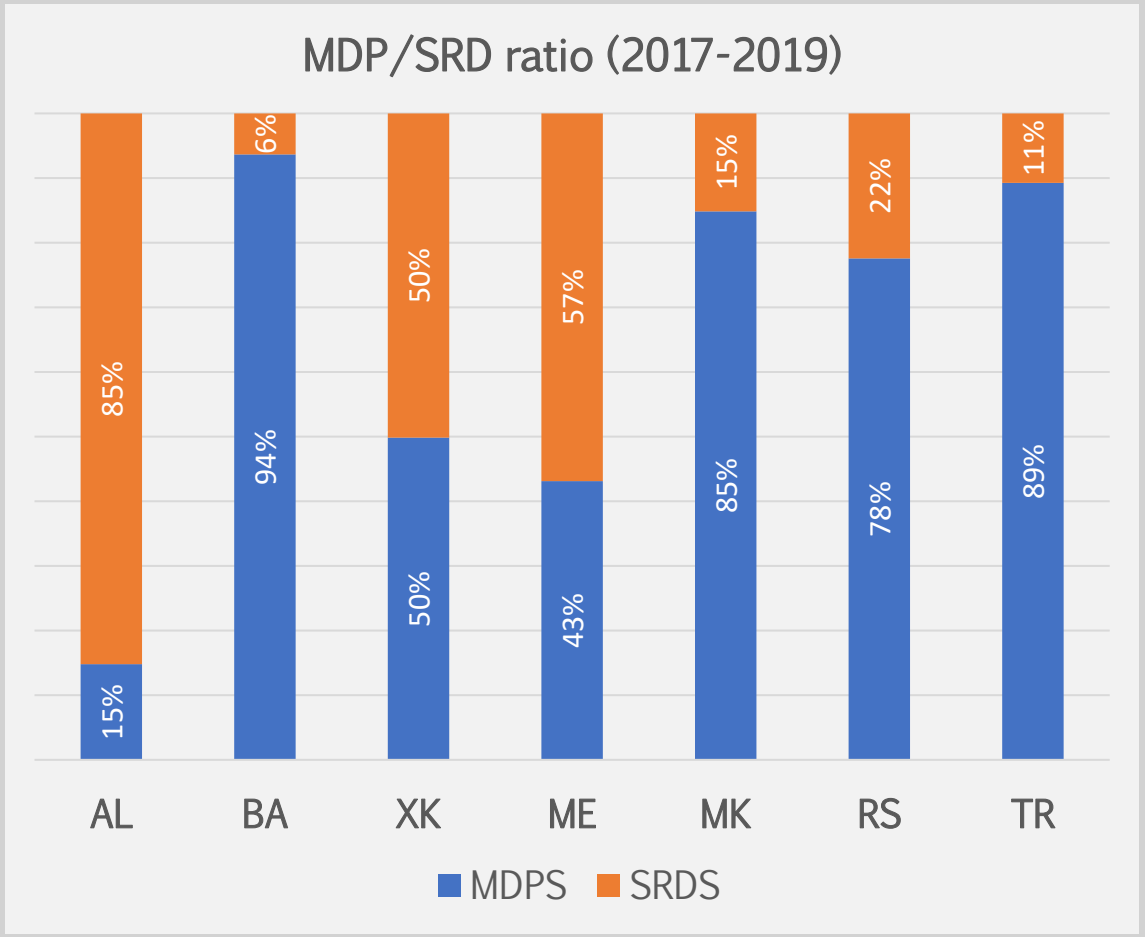




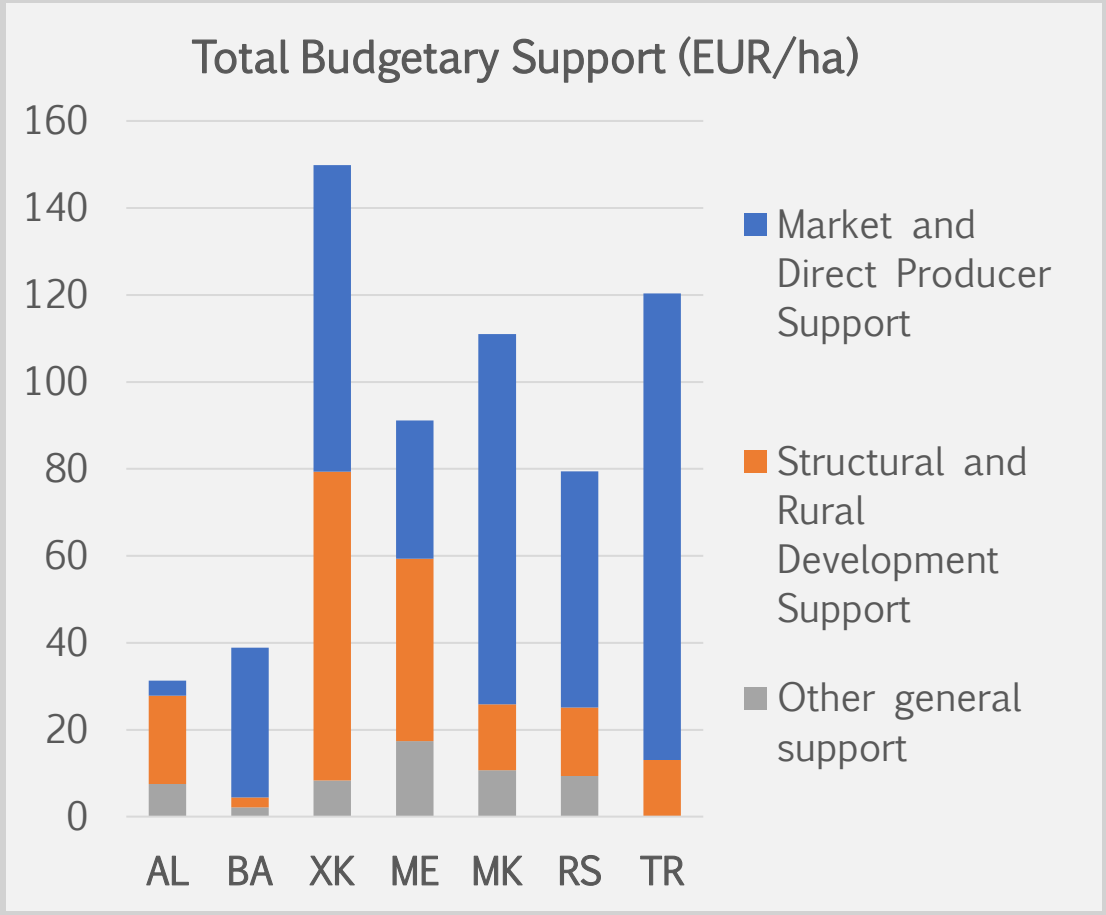


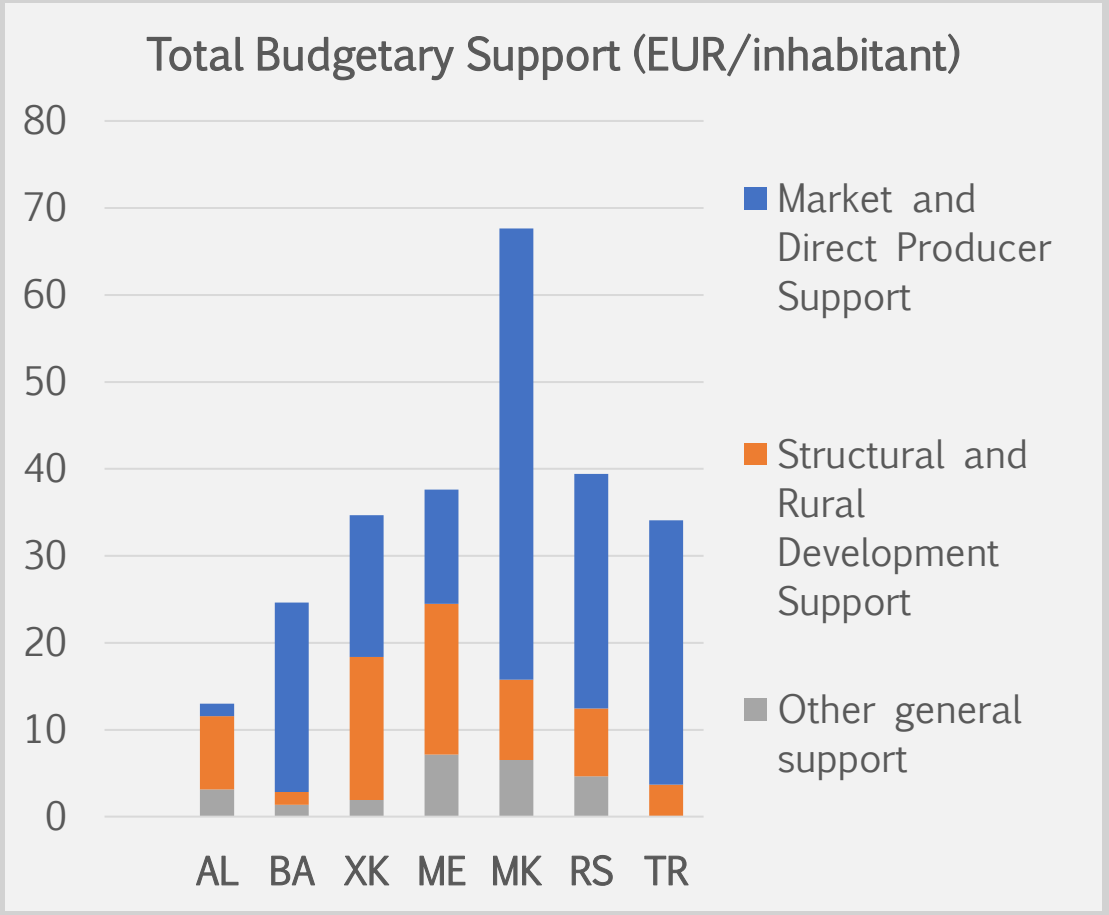
P2. Size and allocation of financial resources (2)



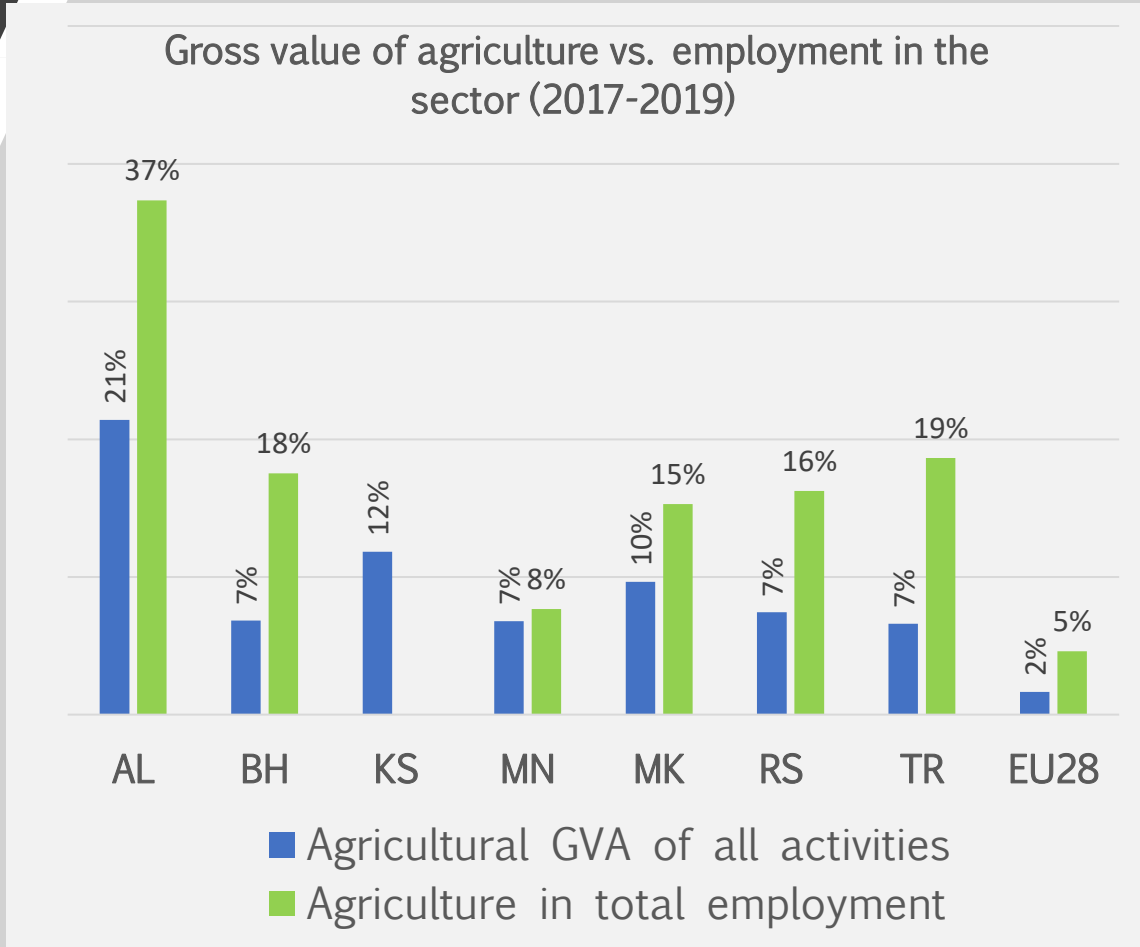


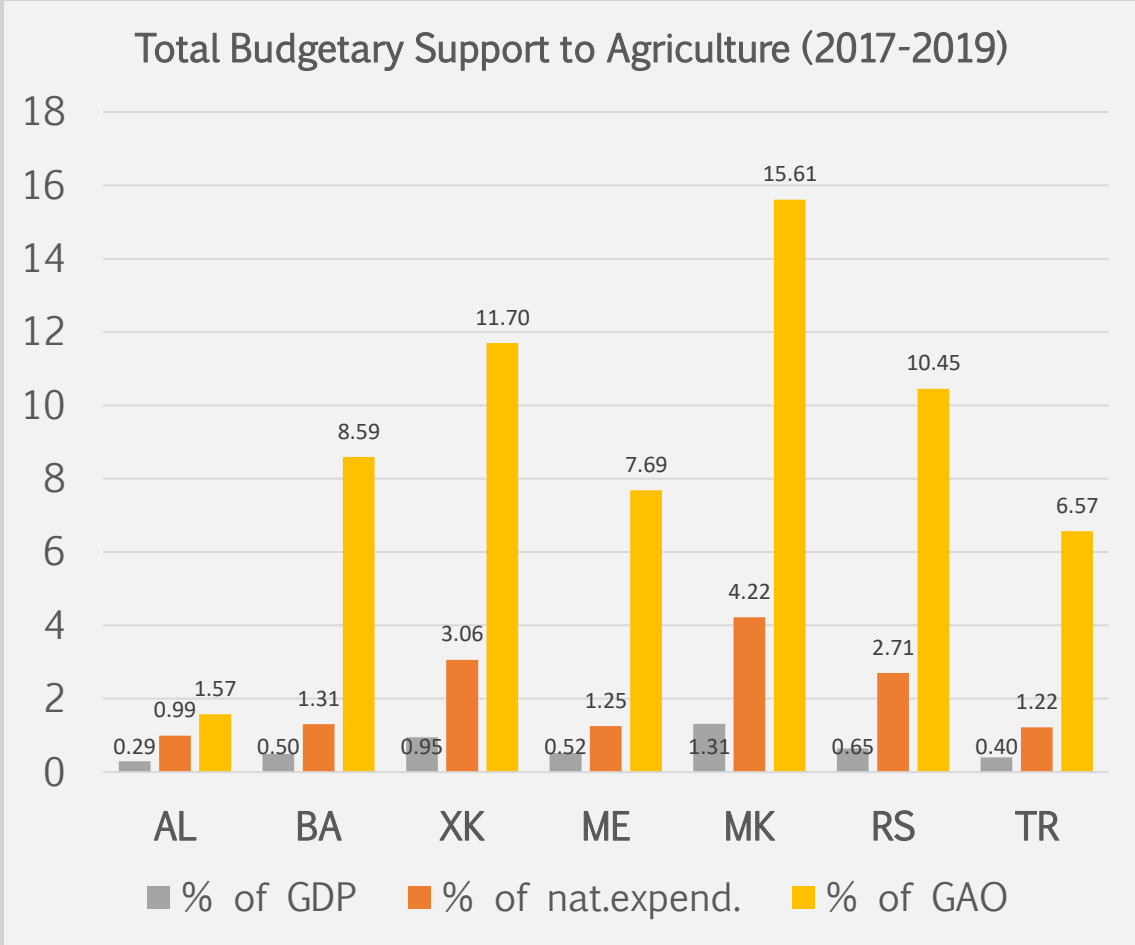
P2. Size and allocation of financial resources (3)





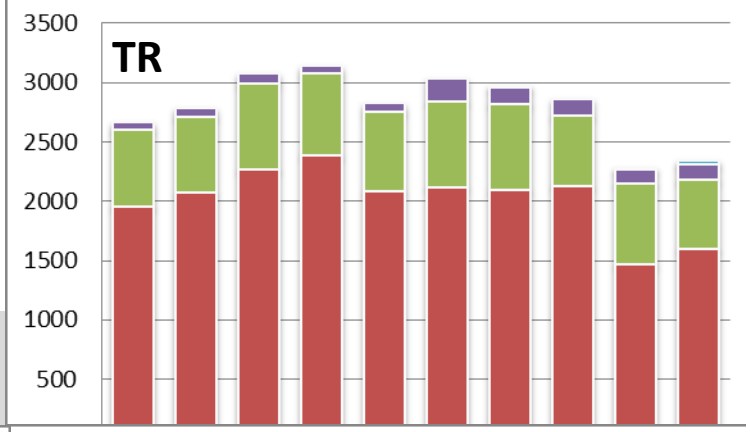
P2. Size and allocation of financial resources (4)

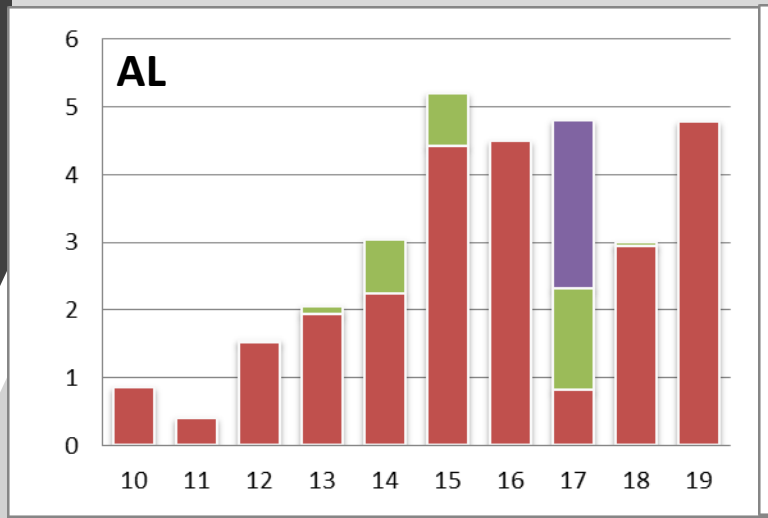


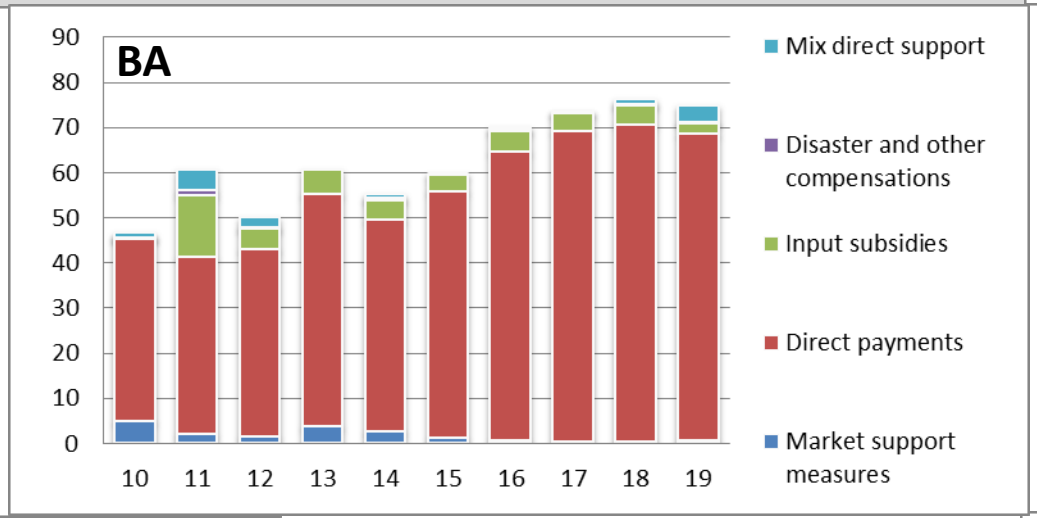


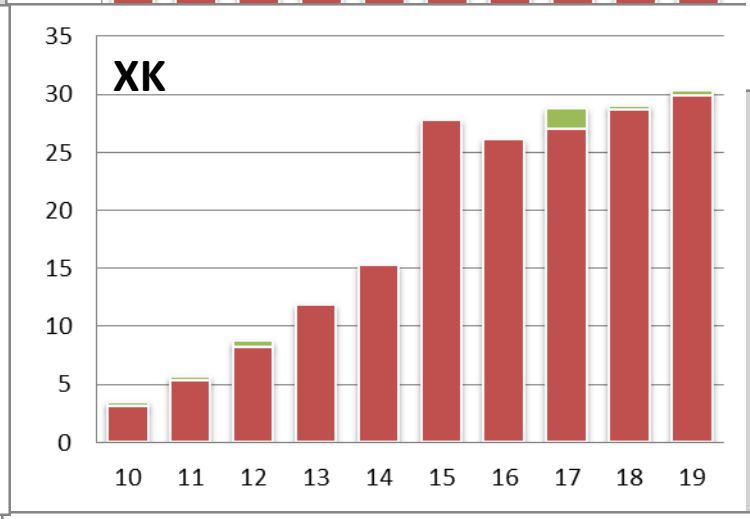
P2. Size and allocation of financial resources (5)

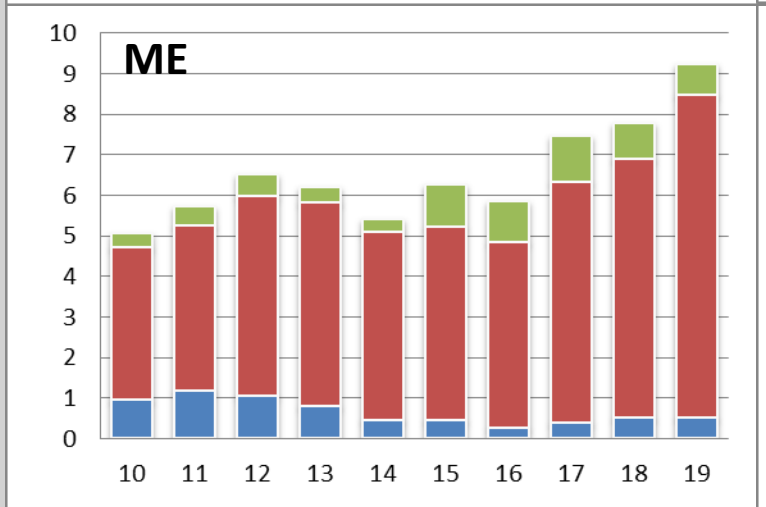
Market and Direct Producer Support Measures (Mill.EUR)

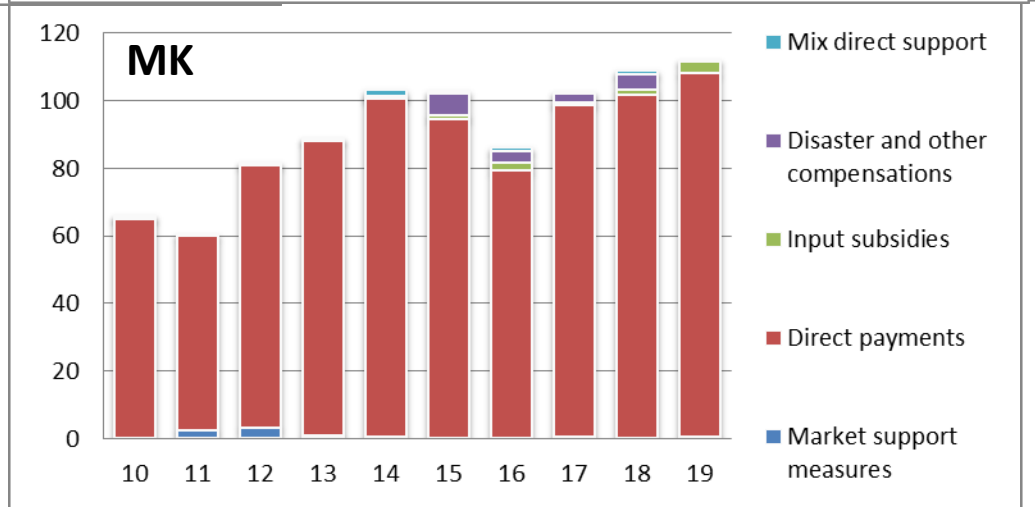


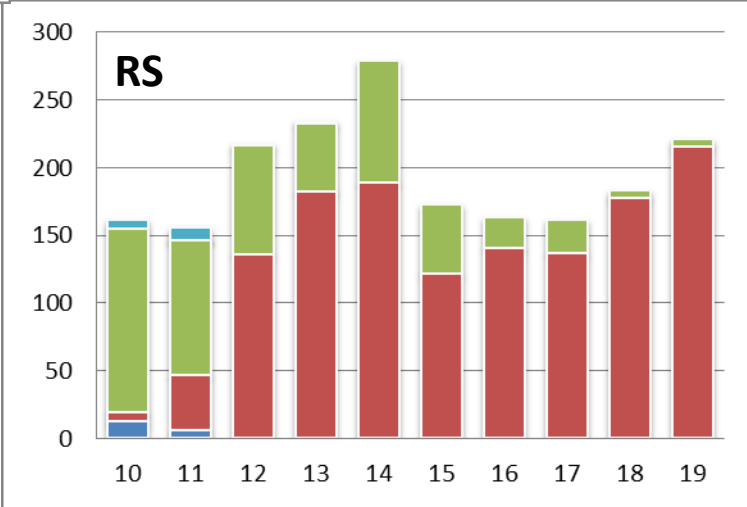




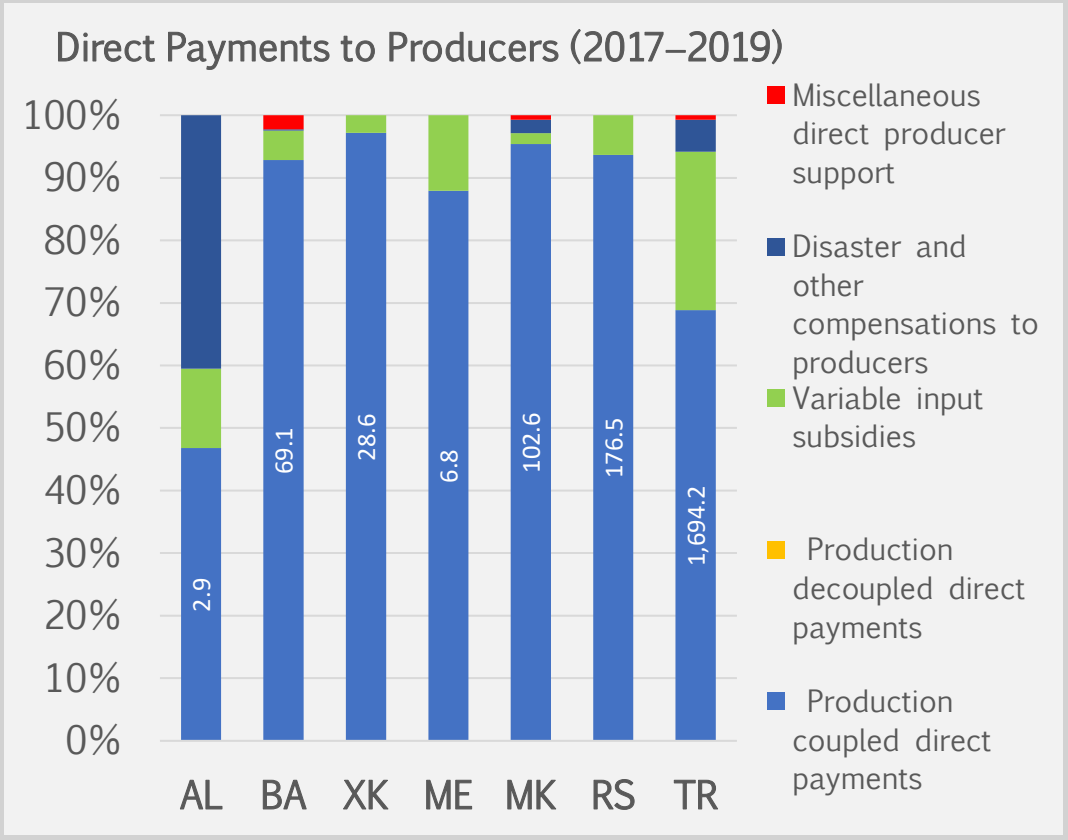


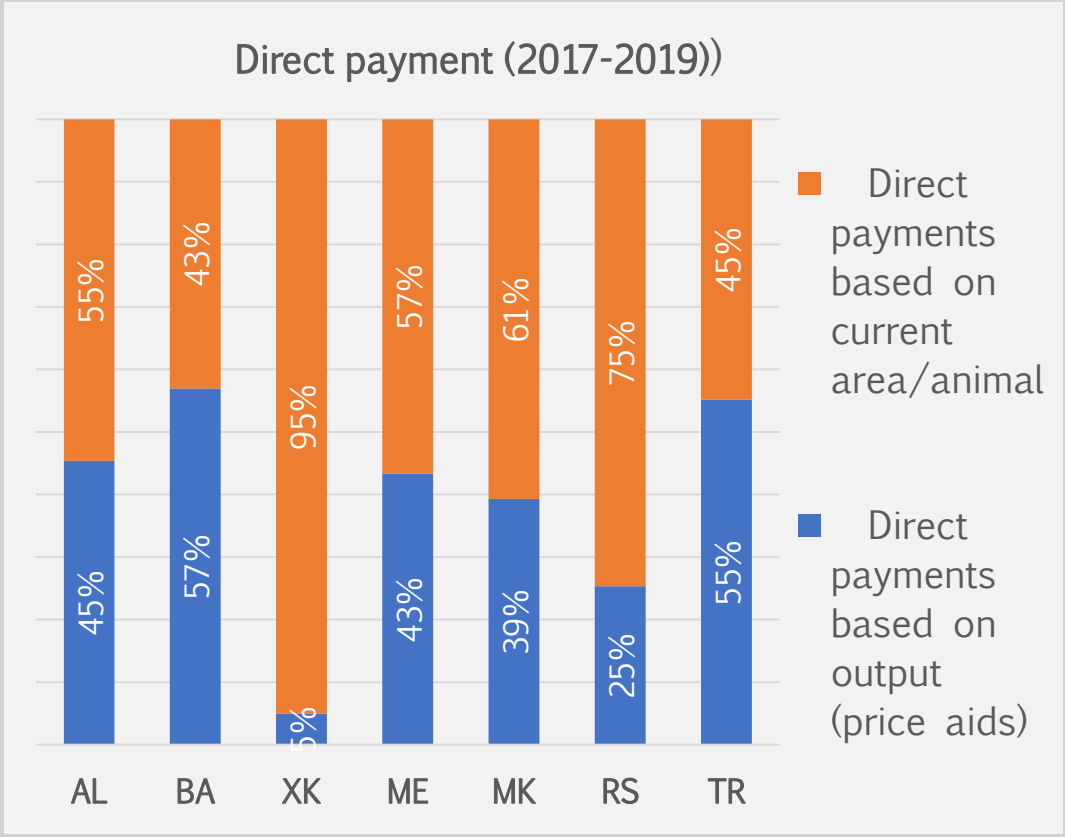




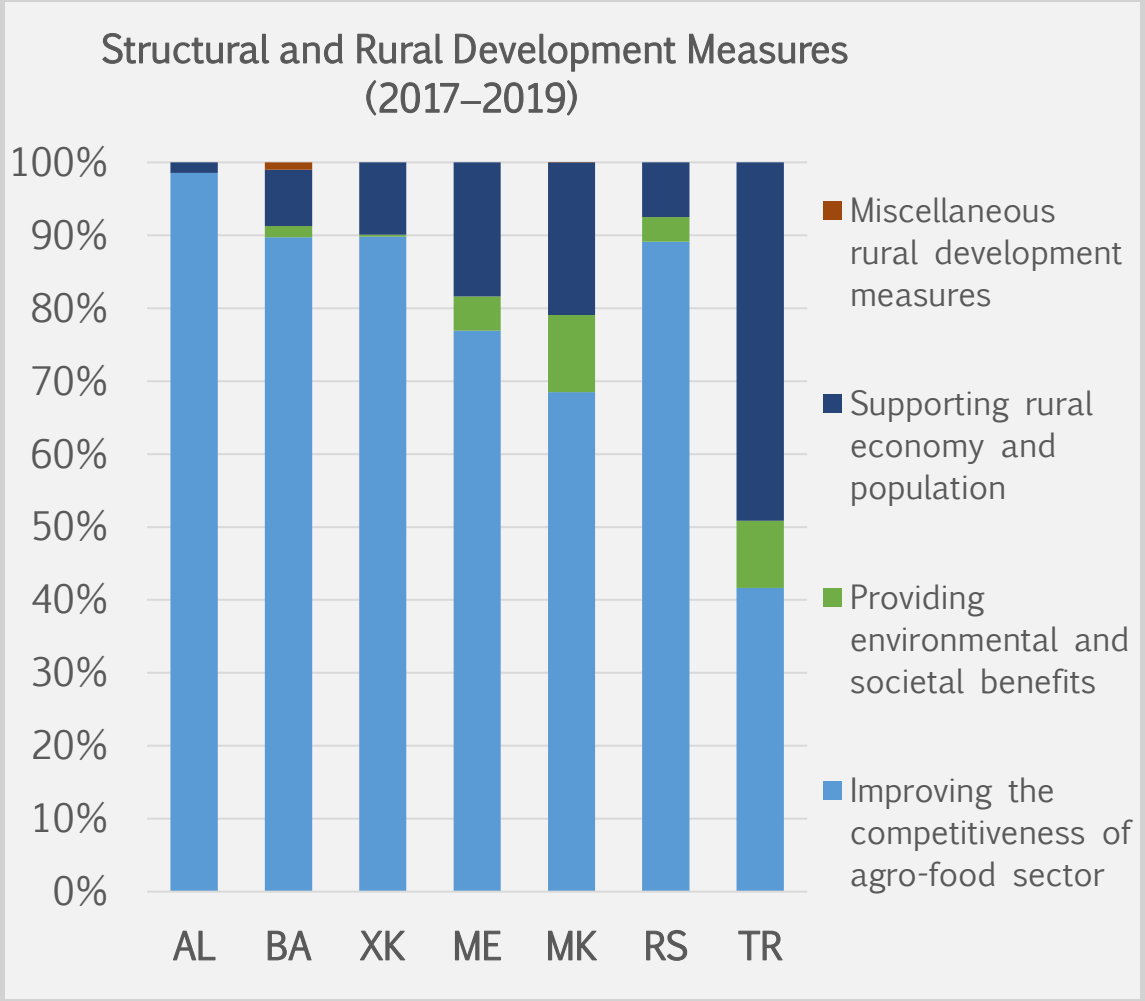


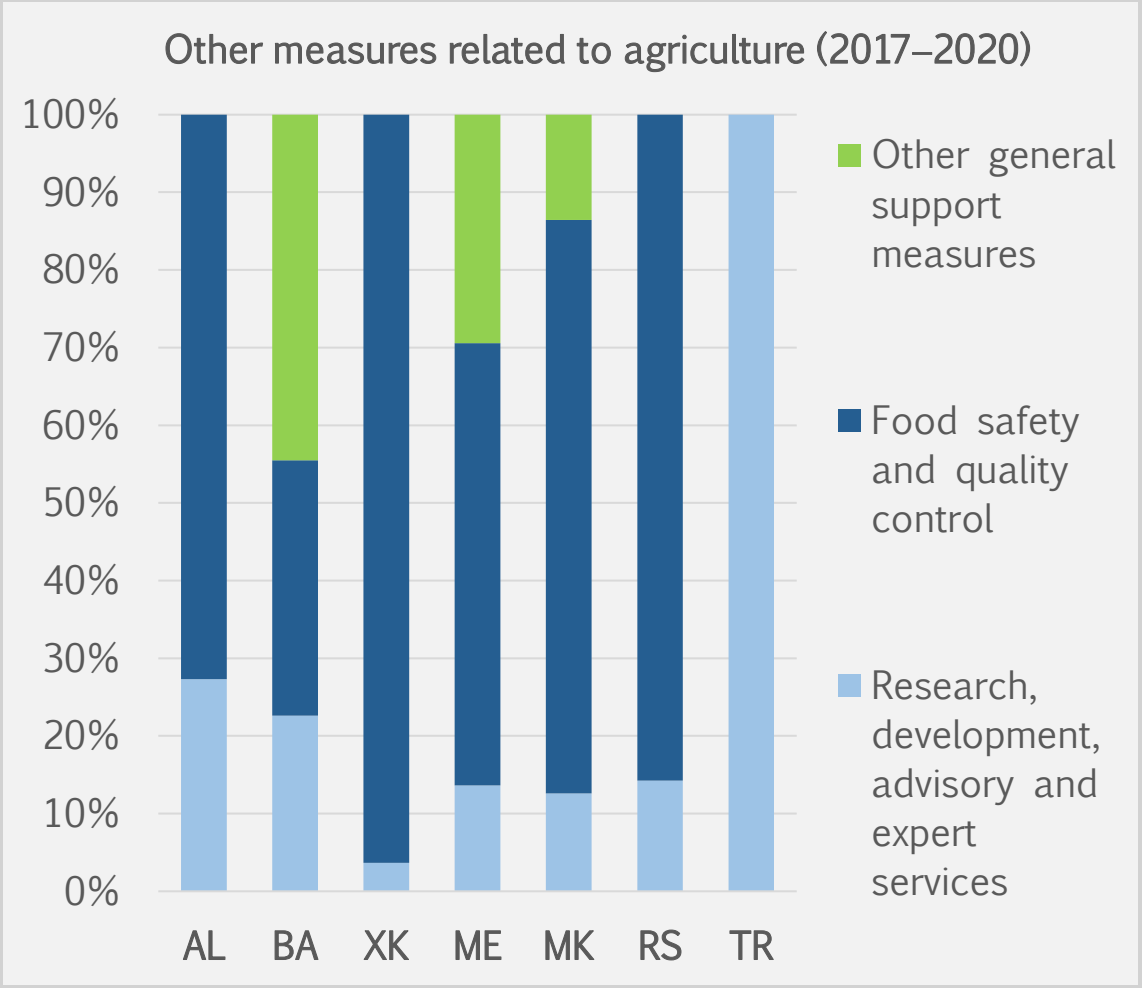
P3. Direct producer support



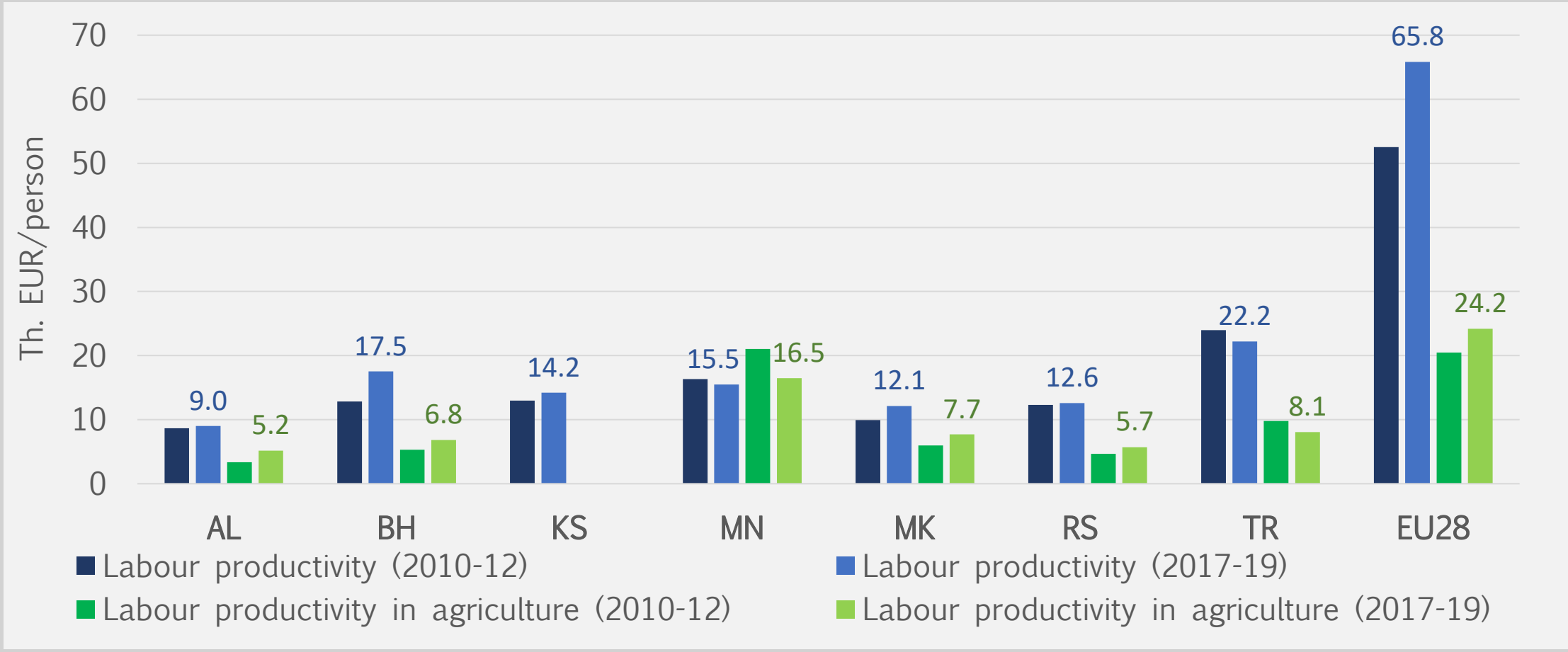


STRUCTURAL AND RURAL DEVELOPMENT MEASURES & Other Measures related to Agriculture



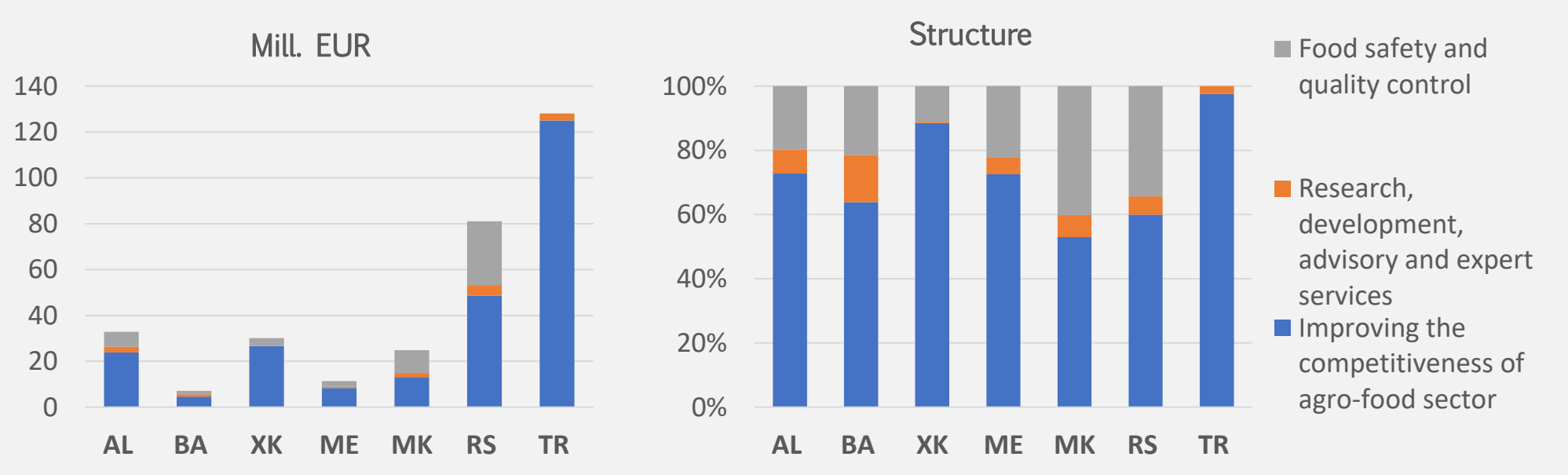


Total labour and agricultural labour productivity (2010-2012 *vs.* 2017-2019)



P4. Measures to improve competitiveness

P4. Measures to improve competitiveness

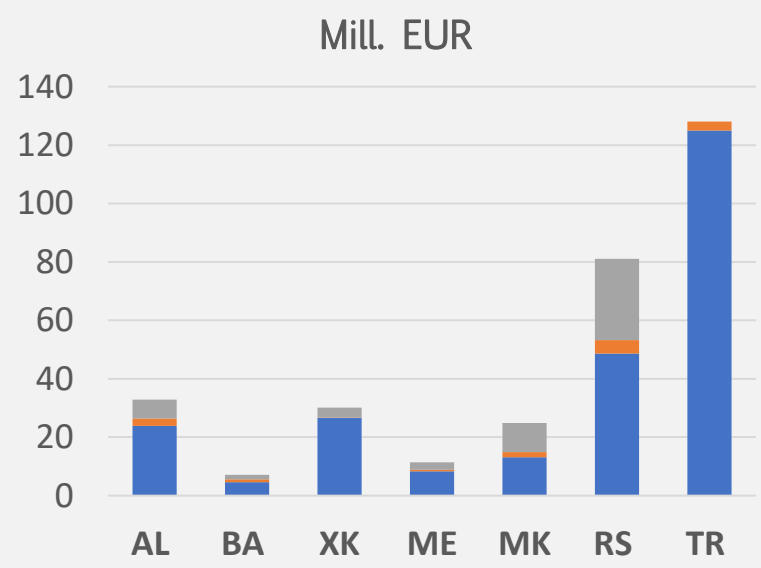


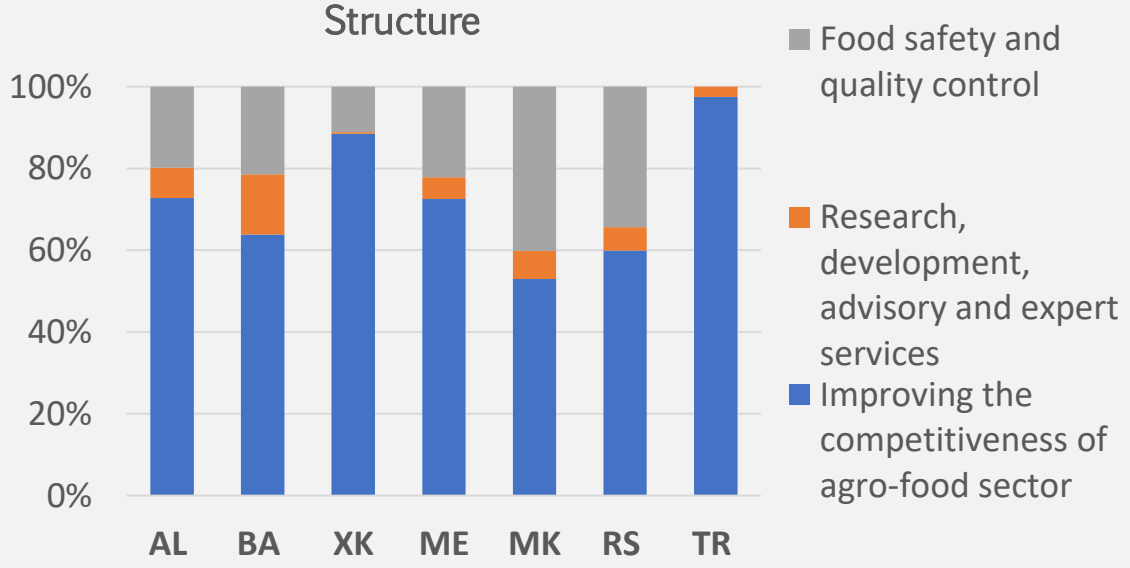
P4. Measures to improve competitiveness

P5. Policy for sustainability and public goods provision by the farming sector

P6. Quality of life and employment

P4. Measures to improve competitiveness





			AL	BA	XK	ME	MK	RS	TR
P4	Measures to improve competitiveness	mill. EUR	32.87	7.16	30.07	11.43	24.86	81.10	128.10
P5	Providing environmental and societal benefits	mill. EUR	-	**0.08**	**0.08**	**0.51**	**2.03**	**1.84**	**27.67**
P6	Supporting rural economy and population	mill. EUR	**0.35**	**0.39**	**2.94**	**1.98**	**4.02**	**4.09**	**147.35**
	At-risk-of-poverty rate	%	23.6	:	:	23.7	22.1	25.2	23.5

EU progress report on WBCs and TR (2018 & 2019)

Acquis Chapter	(11) Agriculture & Rural Development		(12) Food Safety, Veterinary & Phytosanitary Policy	(13) Fisheries	
AL	Early stage	Some level of preparation*	Some level of preparation*	Early stage*	
BA	Early stage		Some level of preparation	Early stage	
XK	Some level of preparation		Some level of preparation	Early stage	
ME	Moderately prepared***		Moderately prepared***	Early stage***	Some level of preparation***
MK	Moderately prepared		Good level of preparation*	Moderately prepared	
RS	Some level of preparation**		Moderately prepared**	Moderately prepared***	
TR	Some level of preparation****		Some level of preparation***	Early stage****	

*Screening started; ** Screening completed;
*** Chapter opened; ****Chapter opened/frozen

totally incompatible
early stage / very hard to adopt
considerable efforts needed
some level of preparation
further efforts needed
moderately prepared
no major difficulties expected
good level of preparation
well prepared / well advanced

Conclusions

- EU is the main priority in all countries
- Some progress is evident
- Lack of strategic planning of ag policy and use of intervention logic of measures
- Lack of complete agricultural and rural statistics for proper M&E and decision making
- Unutilized analytical capacities and lack of communication among institutions
- Coupled measures are a dominant instrument
- Structural and rural development measures need more attention

Recommendations

- EU commitment should be beyond the written words.
- Strategic planning is not needed for EU only, it is for the well being of the agricultural sector and the economy, as whole.
- All available capacities should be used in this process, and they need to be continuously developed.

Thank you for your attention!

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