



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

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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

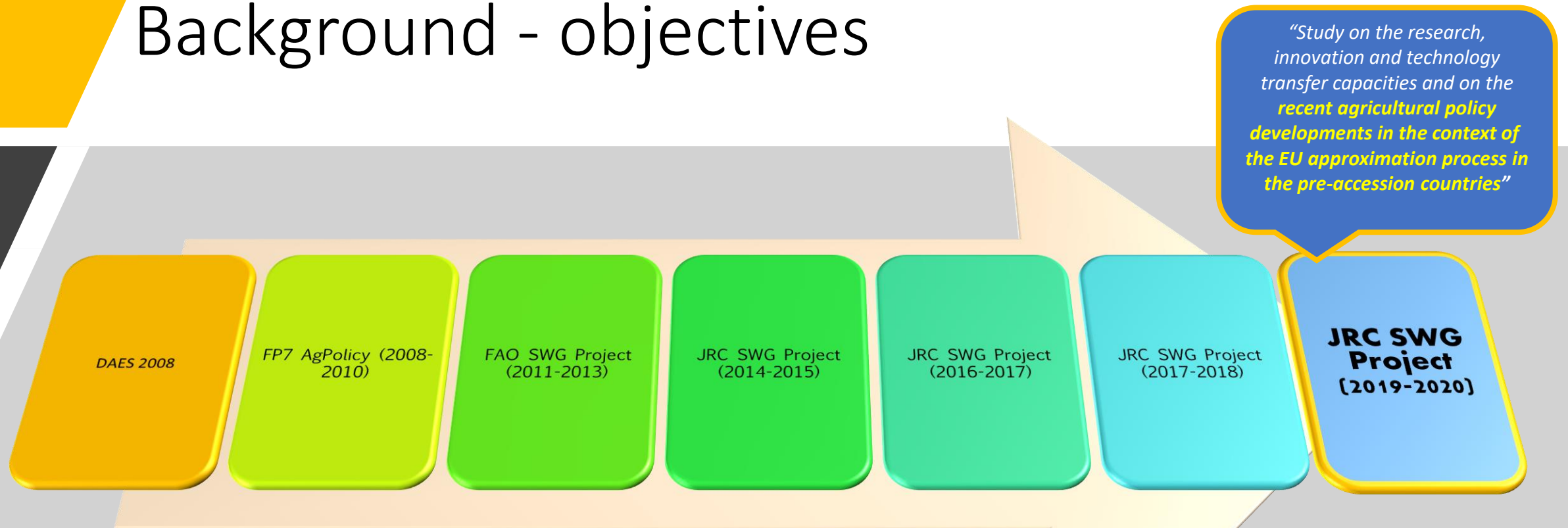
- Continuity
- Comparability
- Comprehensiveness



WB countries

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

Background - objectives



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


North Macedonia (2005)

 2.08 mill.
 5,151 EUR


Montenegro (2010)

 0.62 mill.
 7,202 EUR



Kosovo

 1.80 mill.
 3,656 EUR



Legend

 inhabitants
 GDP per capita


Albania (2010)

 2.86 mill.
 4,425 EUR

Serbia (2012)

 6.99 mill.
 6,104 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,
upgraded

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

- 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 & Acknowledgements

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)

Supported by

- SWG RRD
- JRC IPTS
 - EC

P1. Strategic planning framework

Adopted / Established ...

*...strategic planning / **policy cycle** of ag.policy?*

/*

*...administrative **capacity**?*

/*

*...policy **monitoring** and evaluation?*

/*

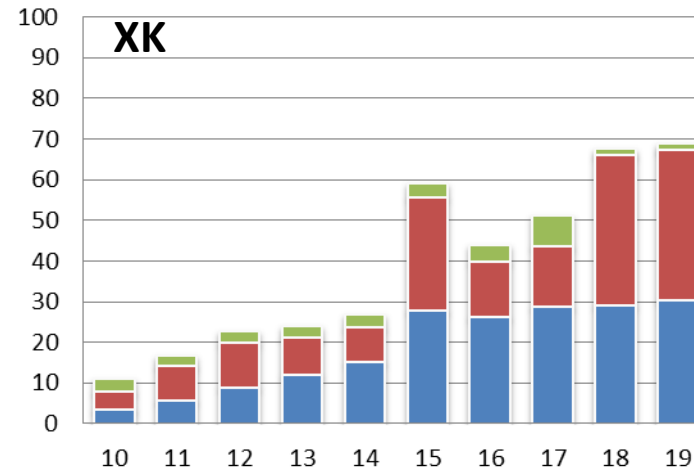
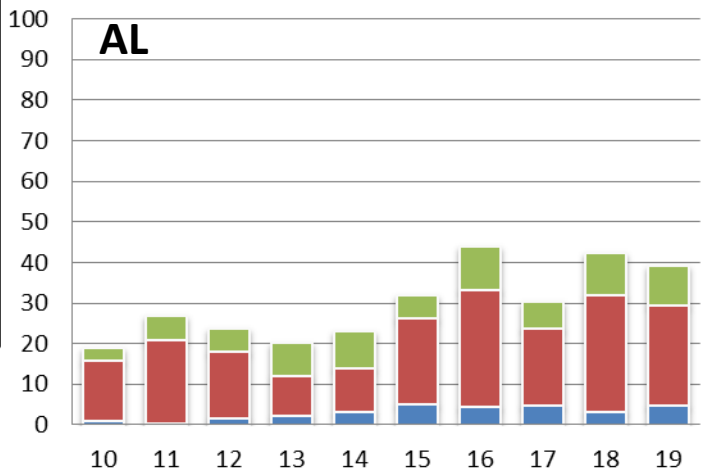
*...**system** of analytical support for policy formation and implementation?*

-

Defining intervention needs by intervention logic of measures?

P2. Size and allocation of financial resources (1)

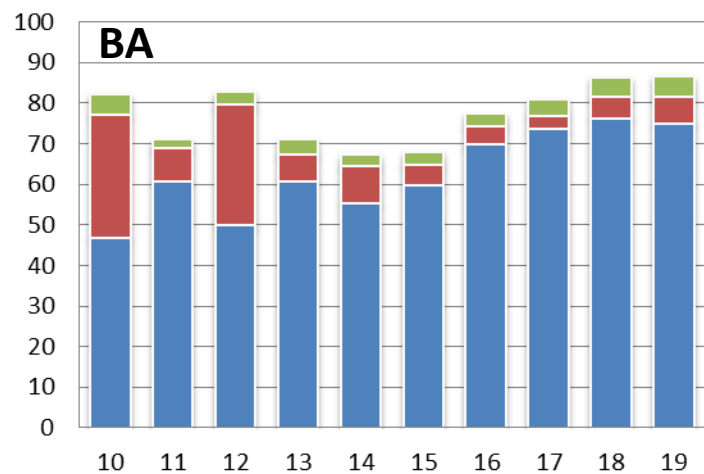
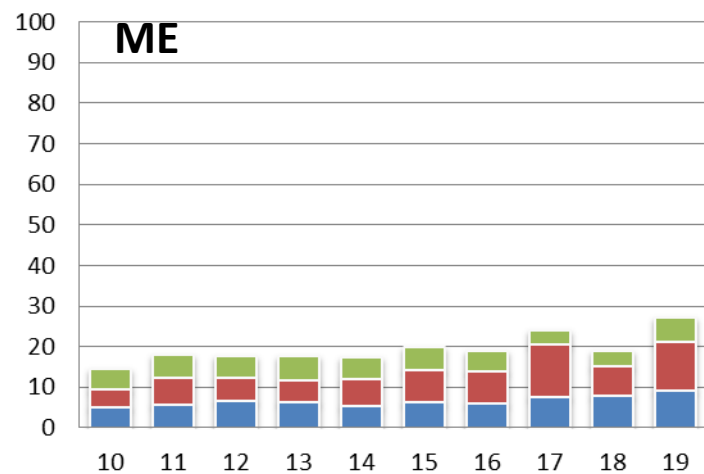
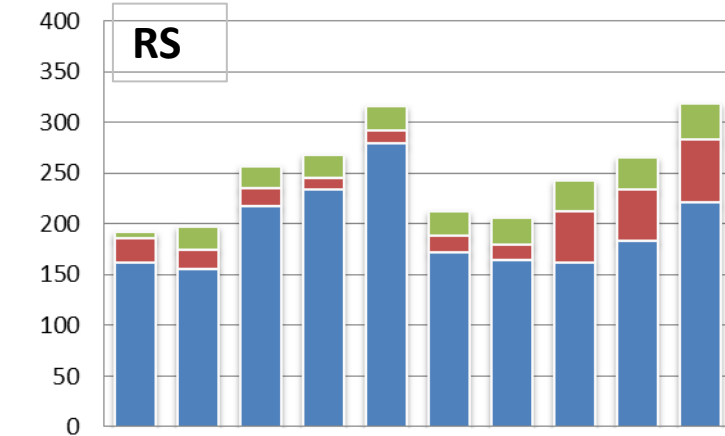
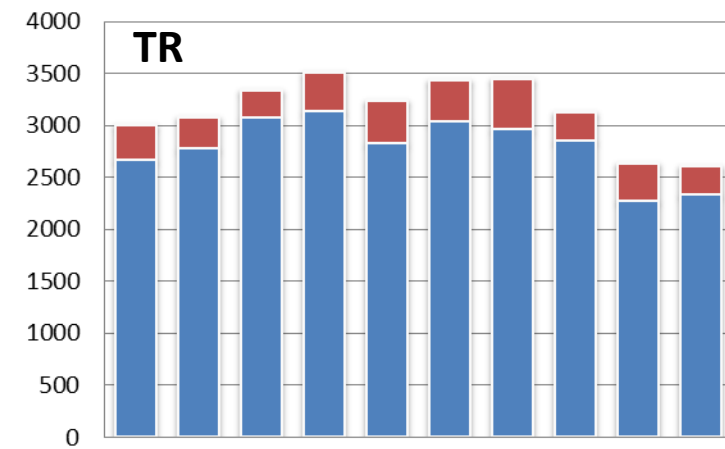
Total budgetary support to agriculture (mill. EUR)



Note:

Left side graphs: scale up to 100 mill. EUR

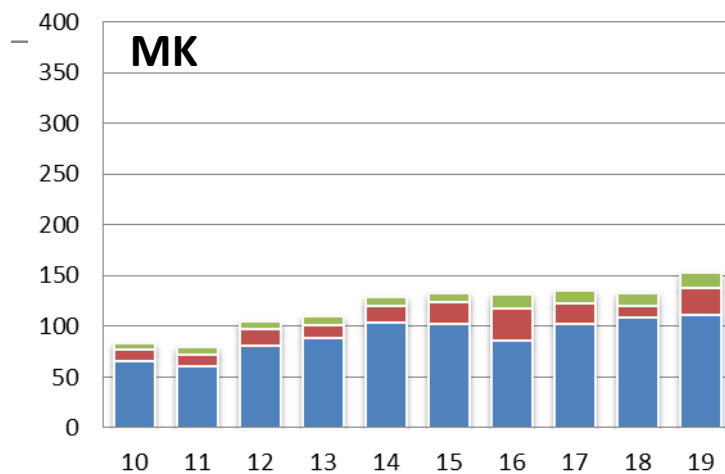
Right side graphs: scale up to 400 mill. EUR and 4000 mill. EUR (TR)



Other measures related to agriculture

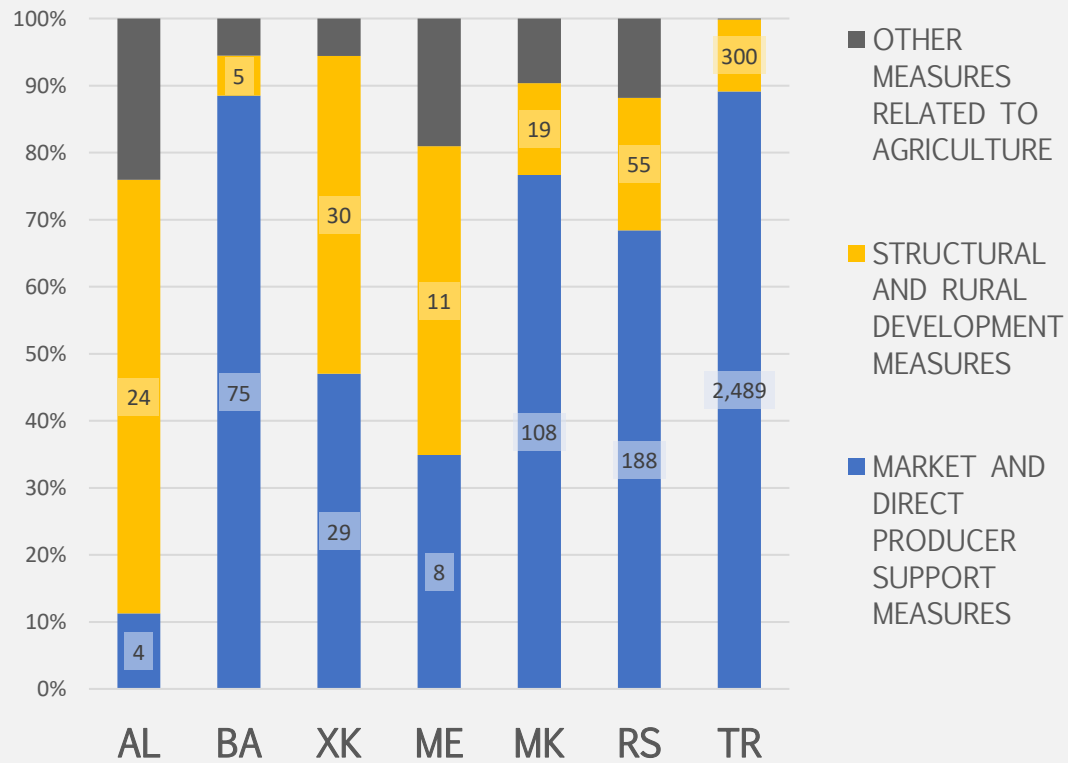
Structural and rural development measures

Market and direct producer support measures

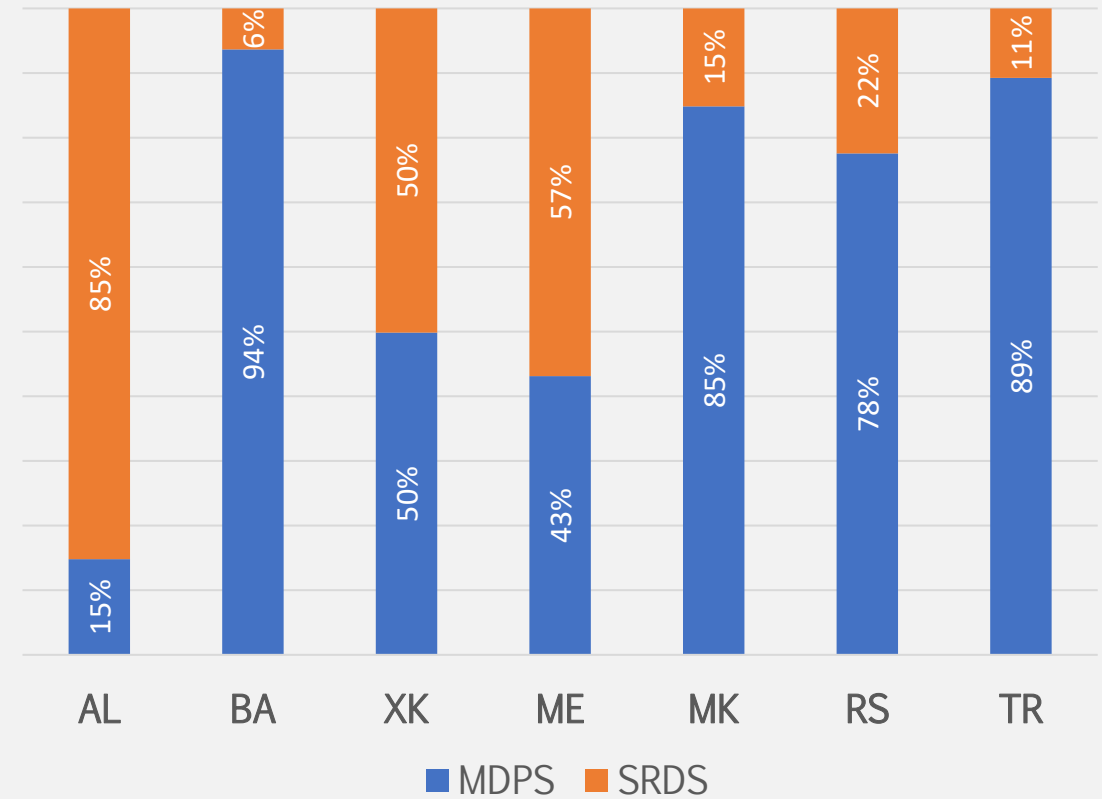


P2. Size and allocation of financial resources (2)

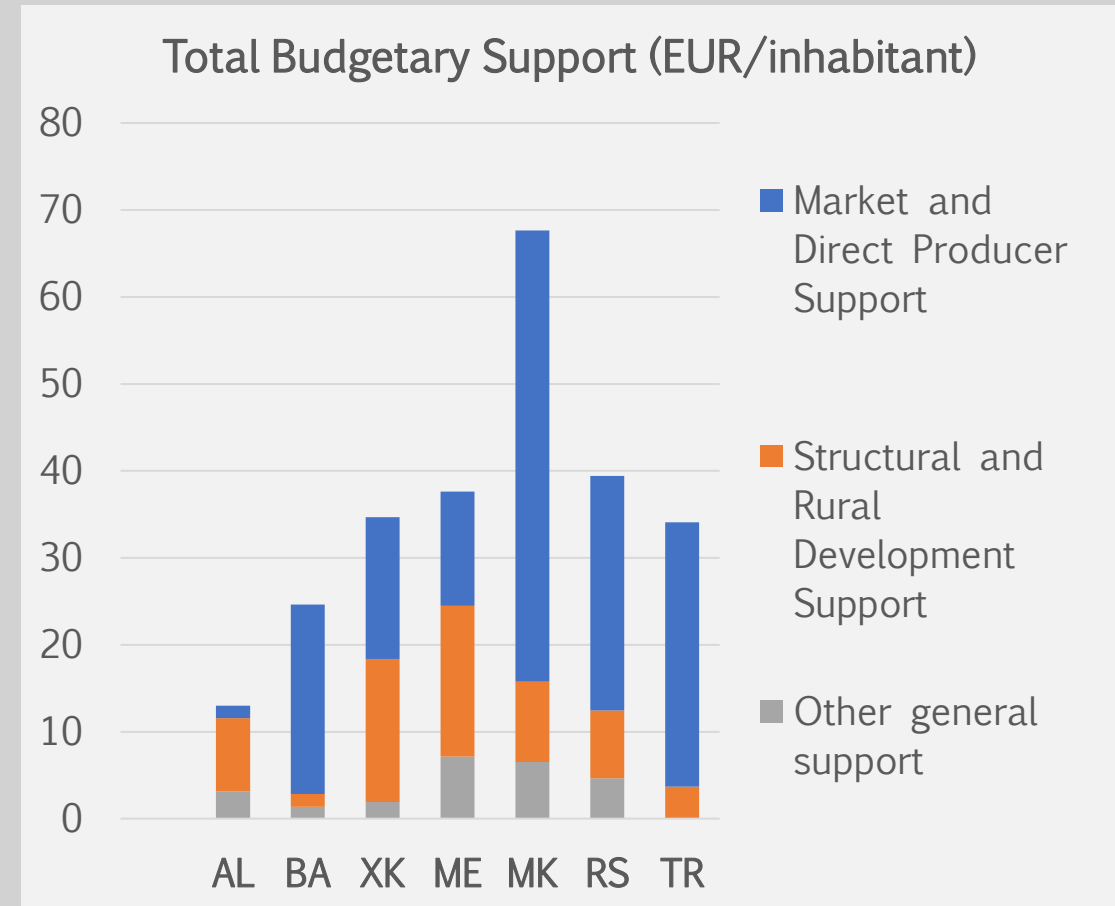
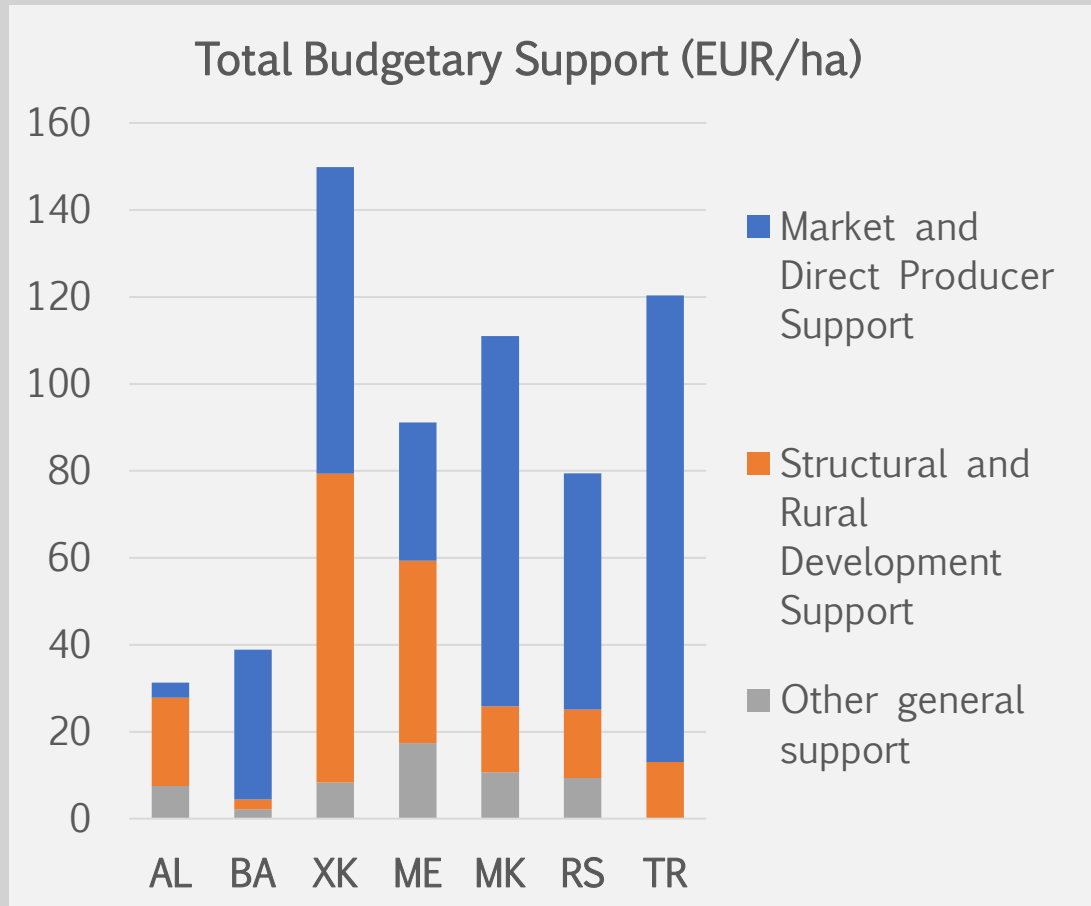
Total Budgetary Support to Agriculture (2017–2019),
in mill. EUR and %



MDP/SRD ratio (2017-2019)

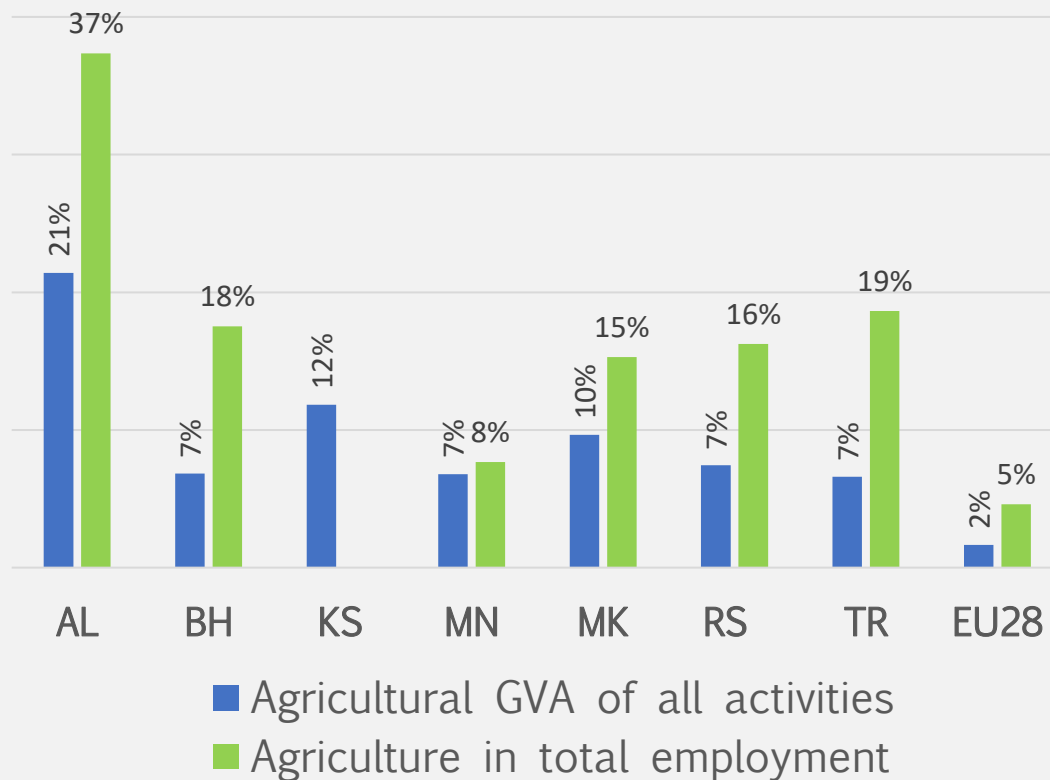


P2. Size and allocation of financial resources (3)

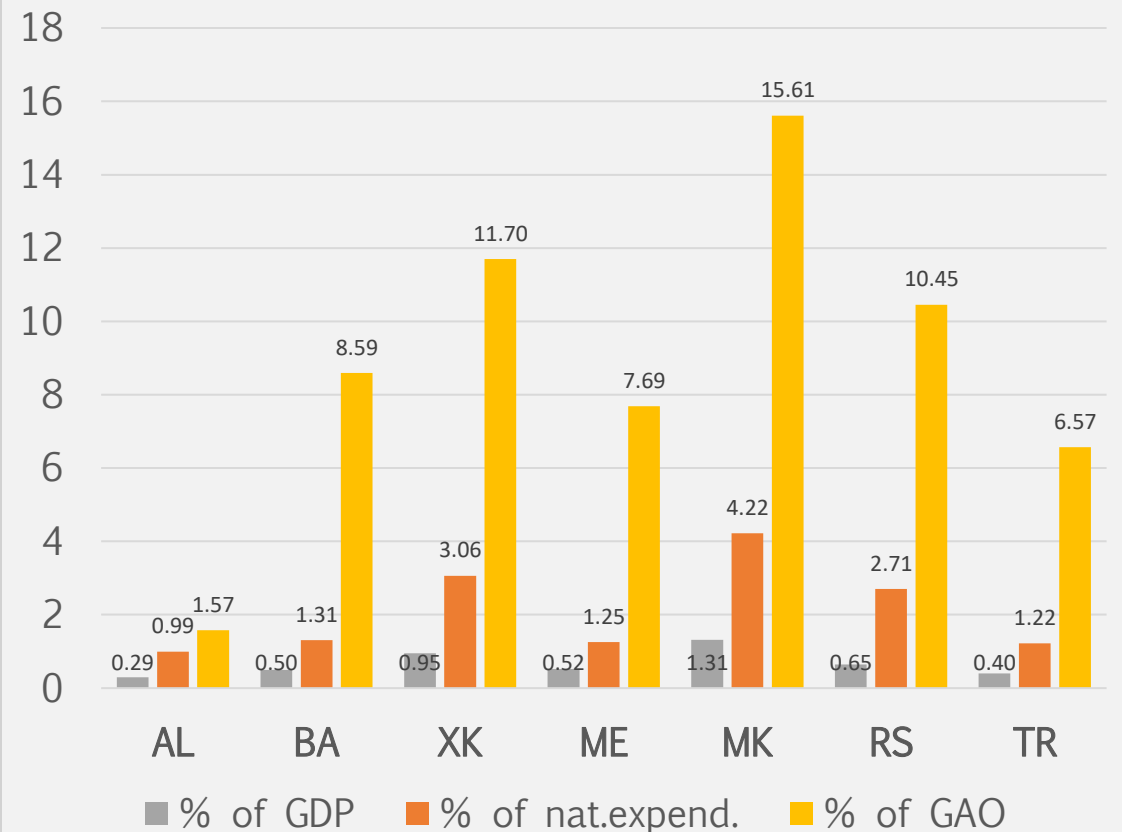


P2. Size and allocation of financial resources (4)

Gross value of agriculture vs. employment in the sector (2017-2019)

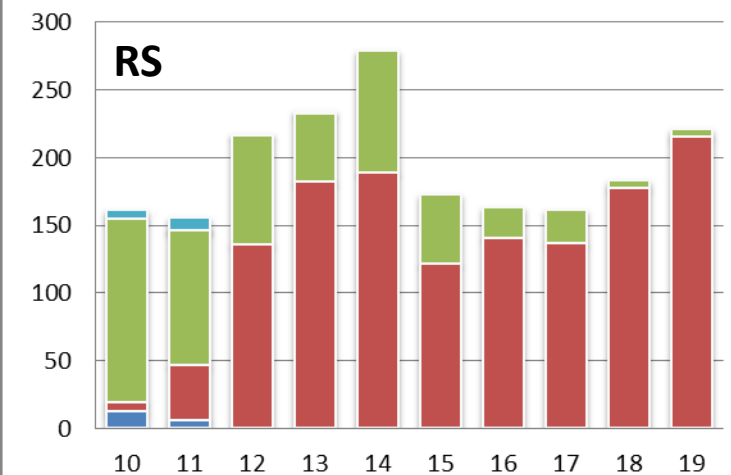
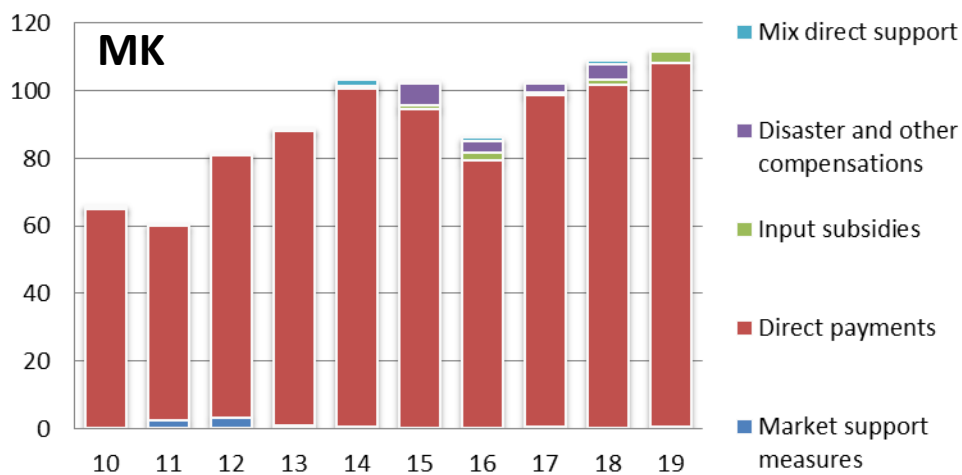
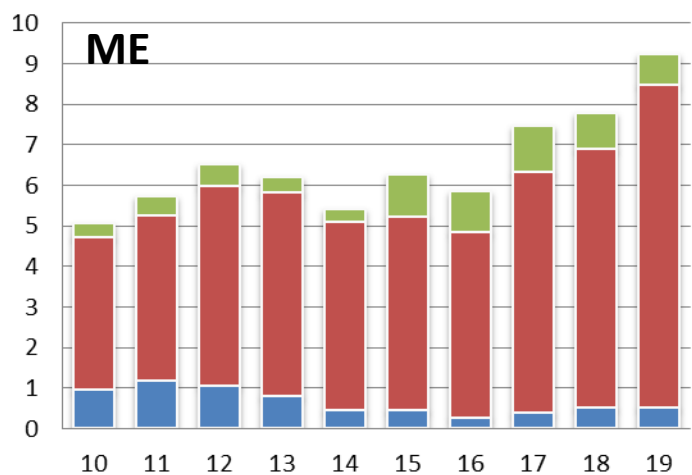
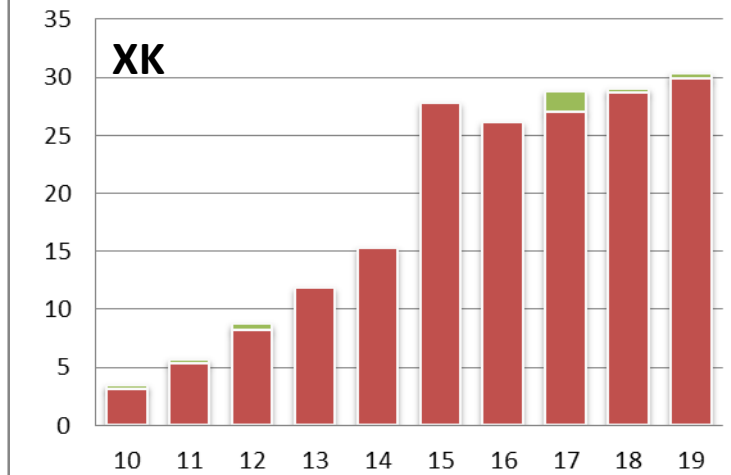
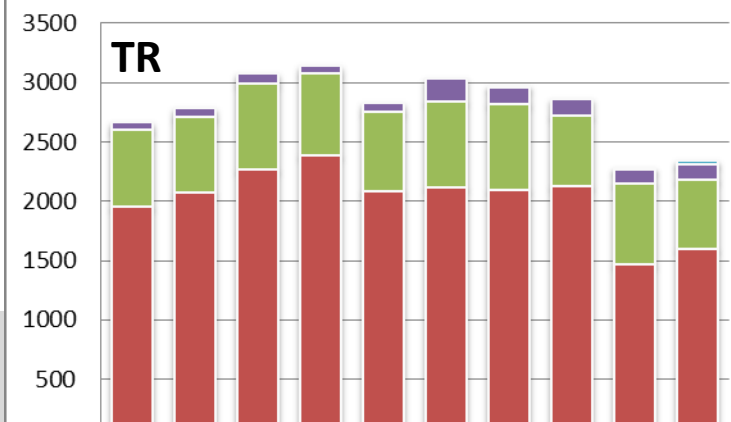
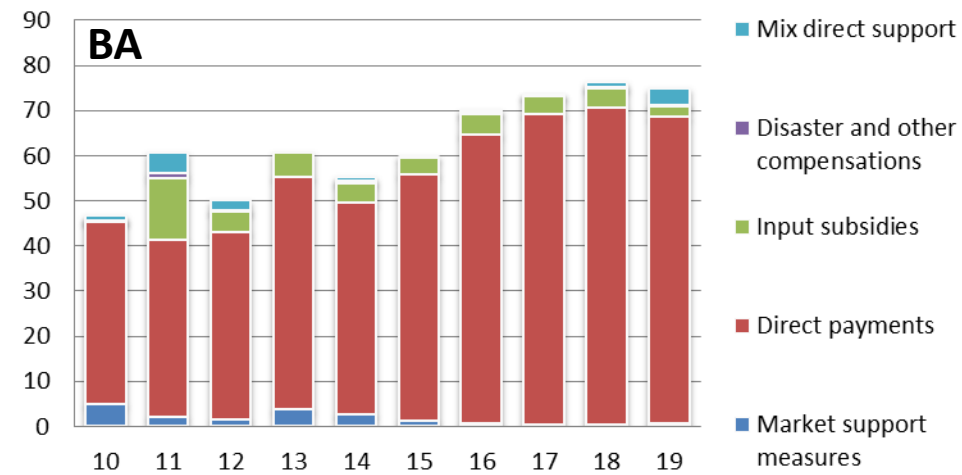
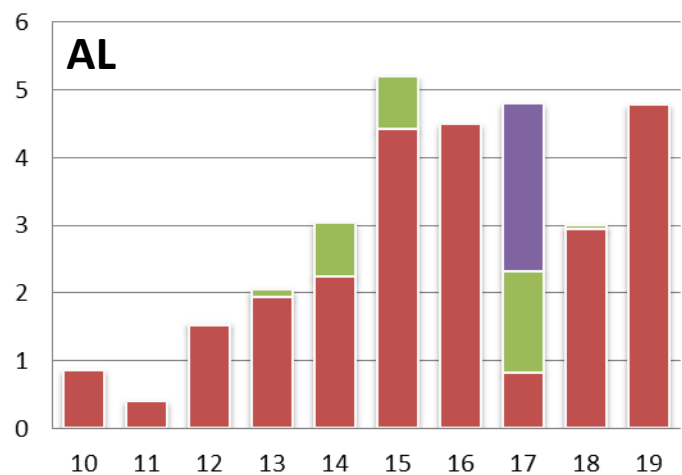


Total Budgetary Support to Agriculture (2017-2019)

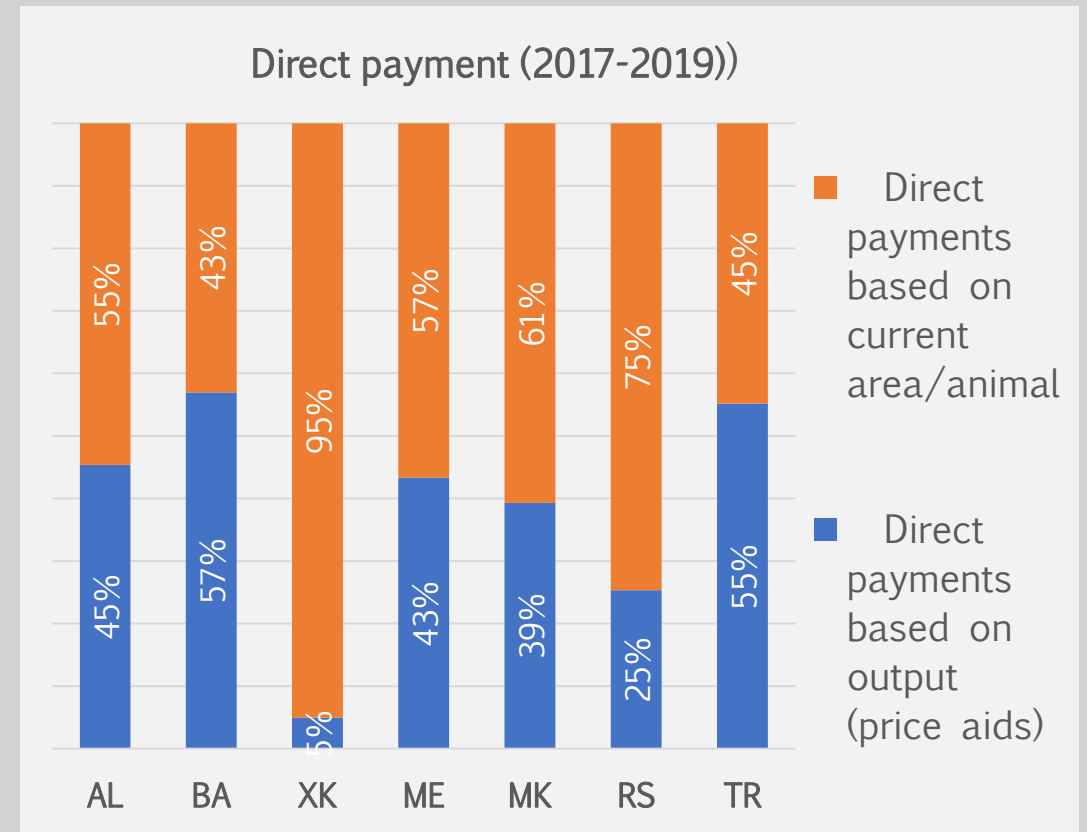
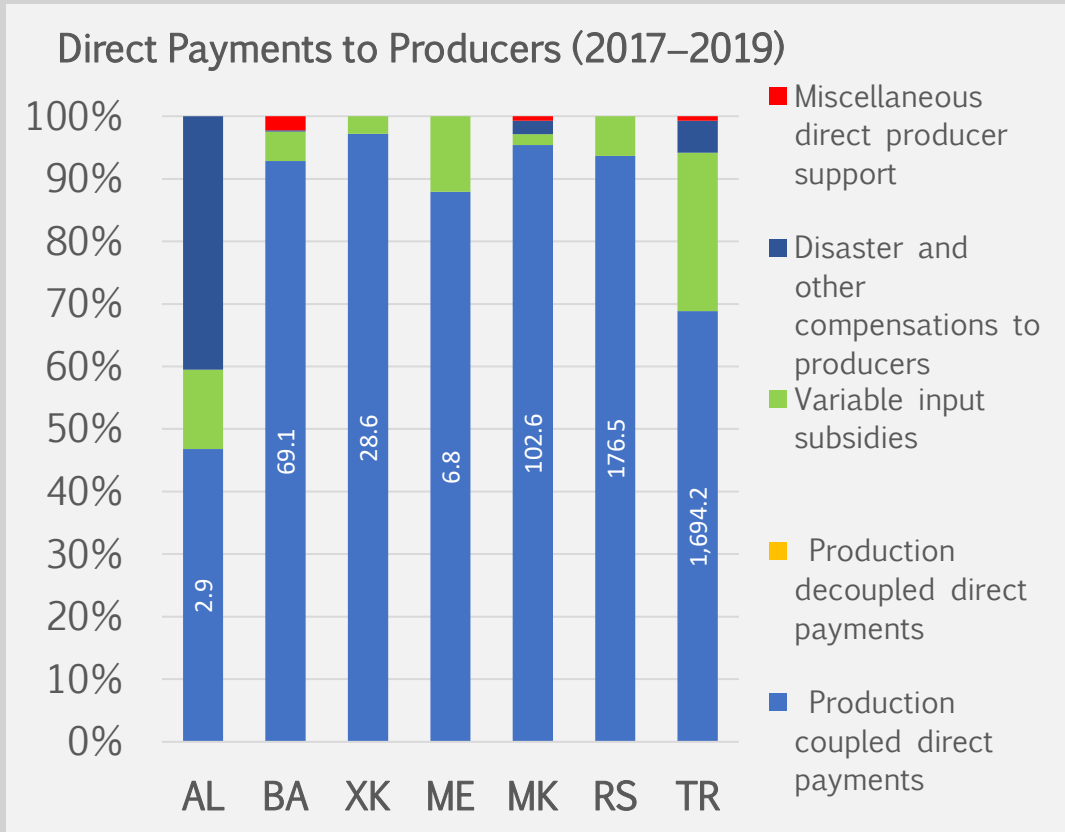


P2. Size and allocation of financial resources (5)

Market and Direct Producer Support Measures (Mill.EUR)

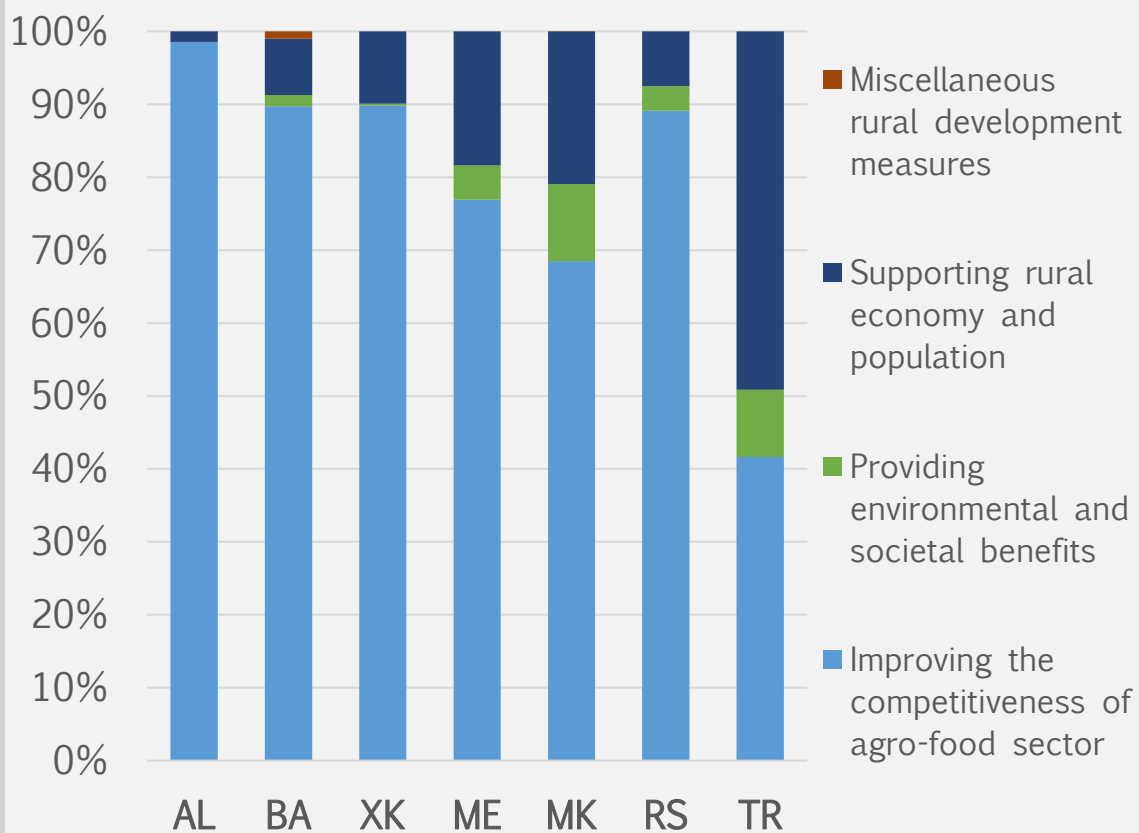


P3. Direct producer support

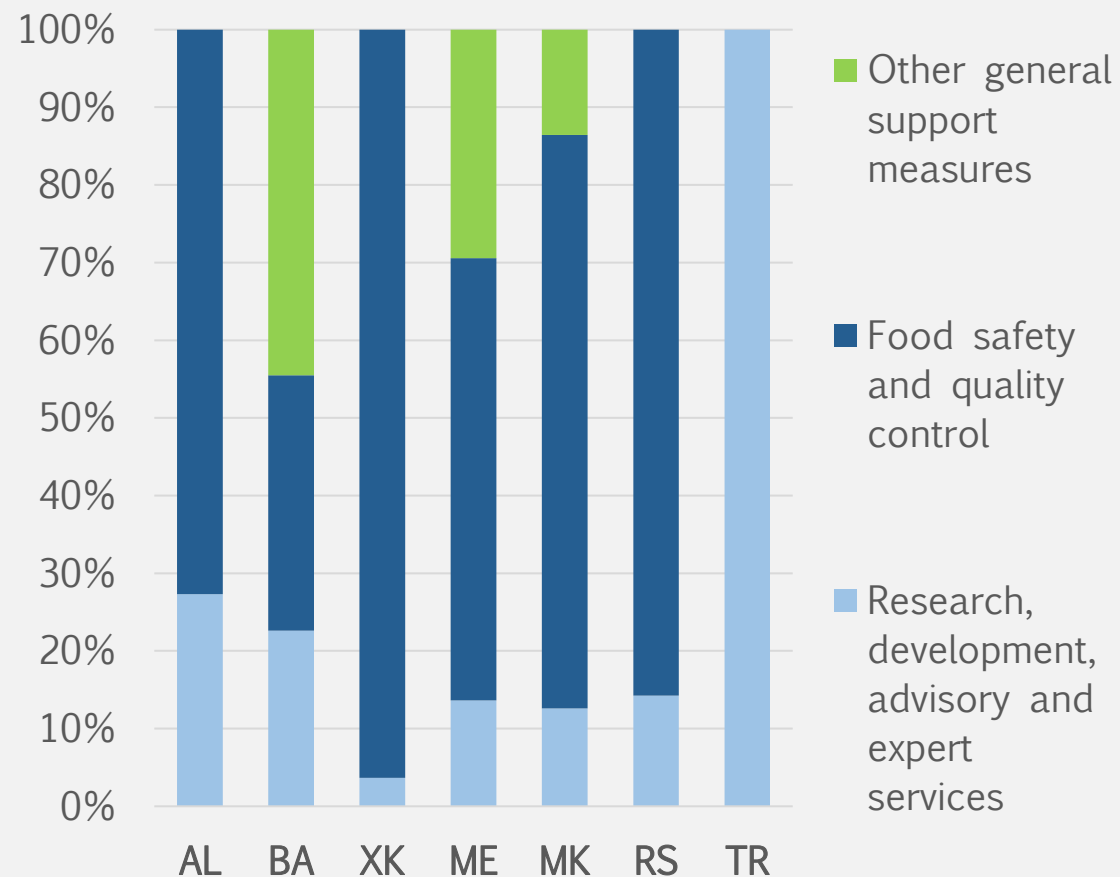


STRUCTURAL AND RURAL DEVELOPMENT MEASURES & Other Measures related to Agriculture

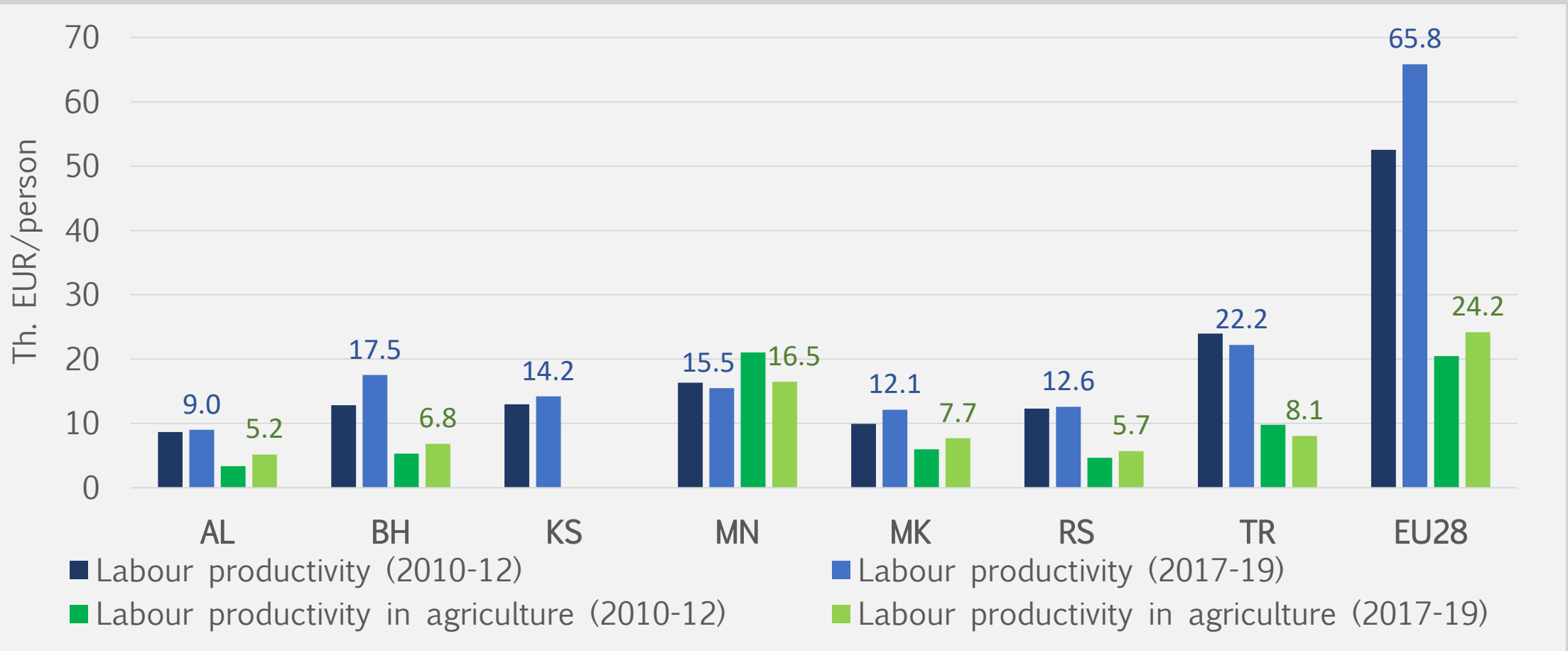
Structural and Rural Development Measures
(2017–2019)



Other measures related to agriculture (2017–2020)

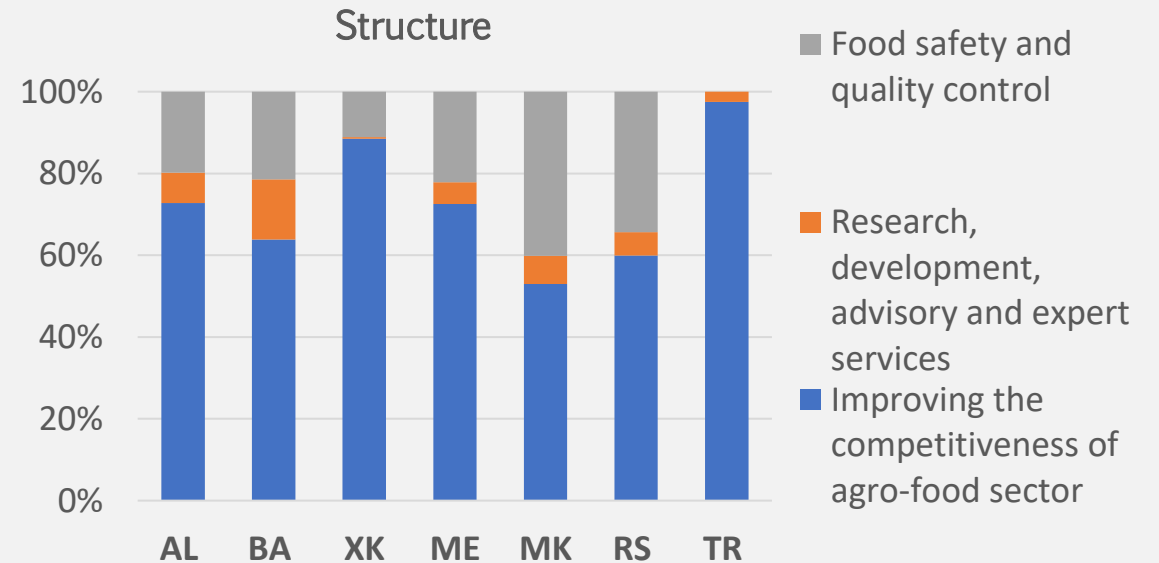
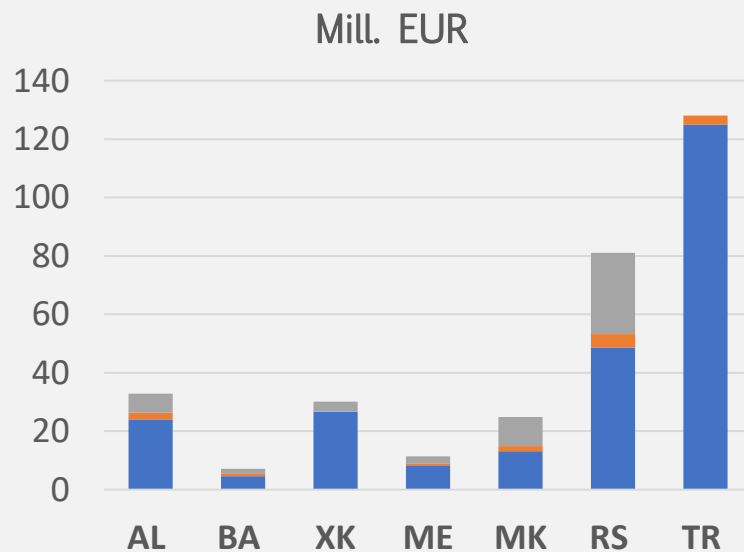


Total labour and agricultural labour productivity (2010-2012 vs. 2017-2019)



P4. Measures to improve competitiveness

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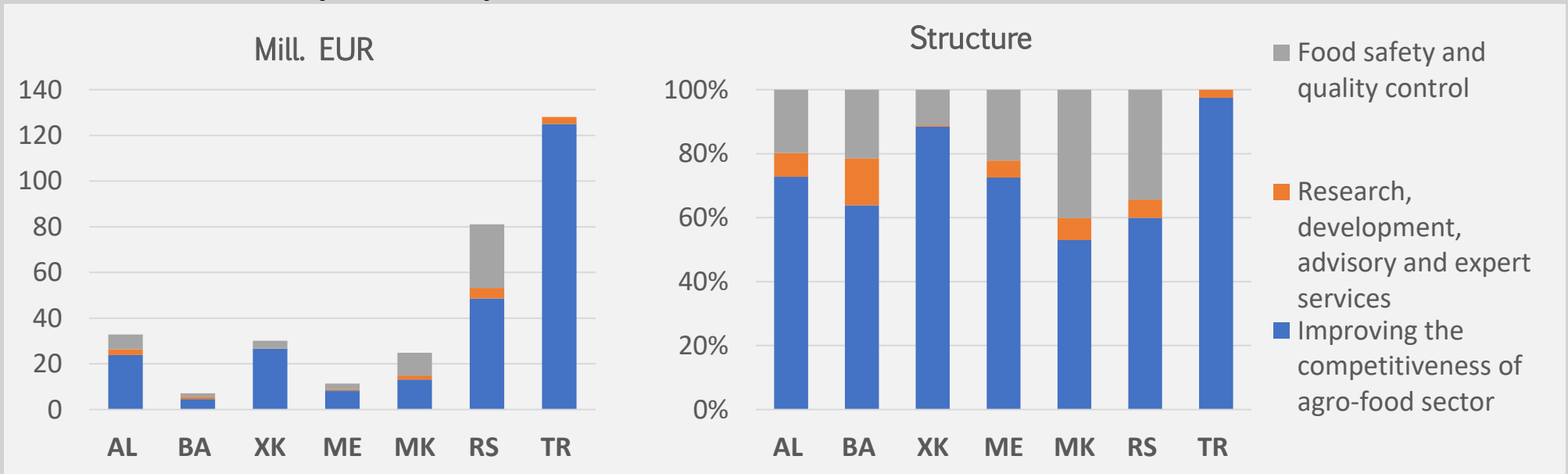


P4. Measures to improve competitiveness

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