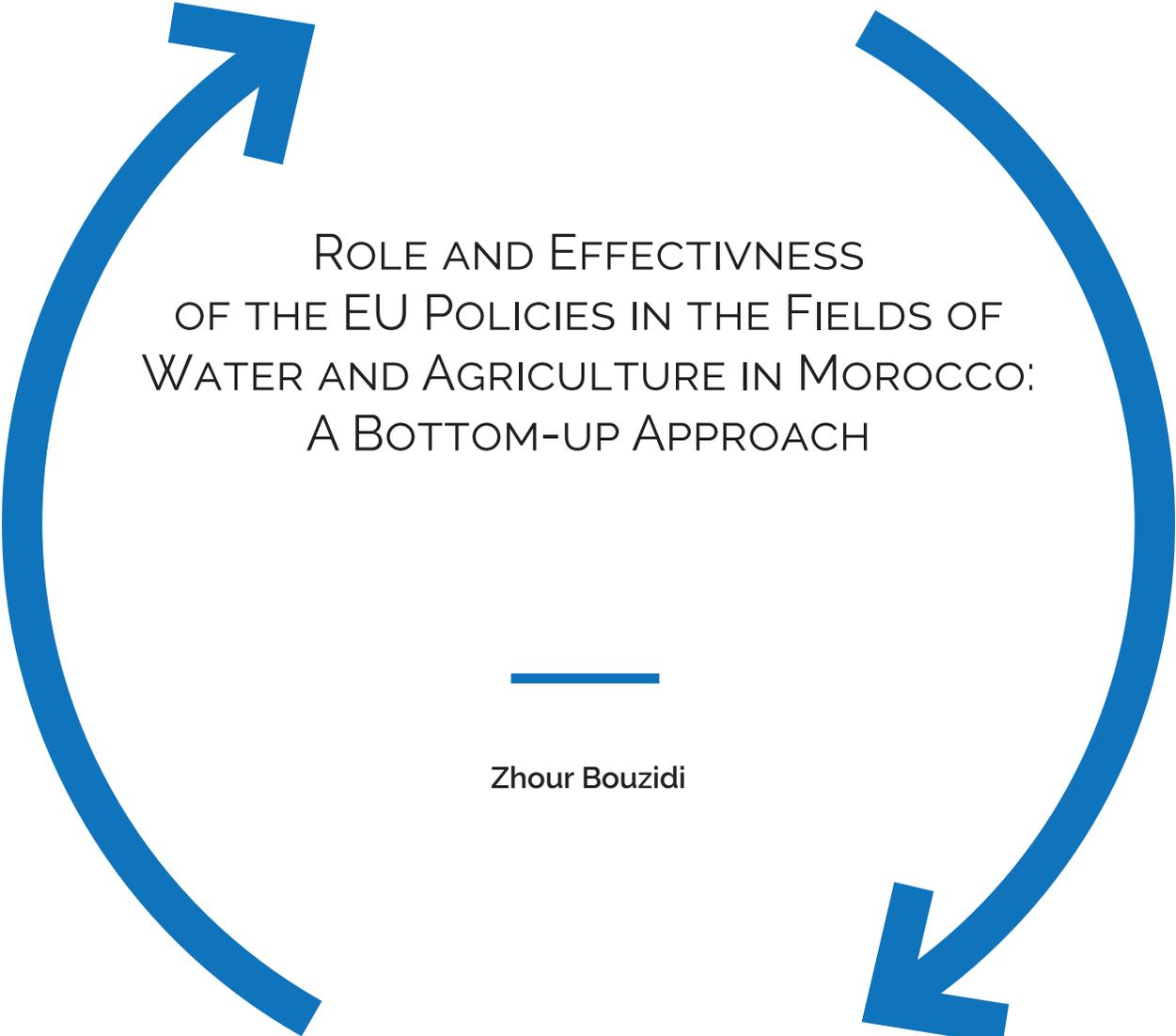




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OF THE EU POLICIES IN THE FIELDS OF
WATER AND AGRICULTURE IN MOROCCO:
A BOTTOM-UP APPROACH

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ABSTRACT

This paper is part of a series of works aiming to study the efficiency of EU policies in the countries of the South Mediterranean under the MEDRESET project. It provides a bottom-up assessment of European policies made by different stakeholders operating in the fields of water and agriculture in Morocco. The study is based on a qualitative methodology combining literature review, content analysis and around fifty semi-structured interviews. The paper highlights the local stakeholders' perception of national and international policies in the fields of water and agriculture. It outlines the different issues as presented by the stakeholders in their diversity as well as the perception of the EU's role and the possible ways to improve the EU's approach towards Morocco in terms of assistance and trade policies.

INTRODUCTION

Water and agriculture widely determine a country's socio-economic development. These two sectors are shaped by the policies implemented at both national and international levels. Therefore, assessment of these policies is imperative in measuring the potential of development, especially in countries such as Morocco where agriculture largely contributes to the national economy. In that perspective, the MEDRESET project aims at assessing the efficiency of European Union's assistance and trade policies in the fields of water and agriculture and reconsider them while keeping in mind the local issues in question.

This report will include the following: (i) an overview of hydro-agricultural policies; (ii) a presentation of the issues related to agriculture as defined by the main stakeholders in the sector; (iii) the different stakeholders' perception of EU policies; (iv) and finally the implications of policies of cooperation between Europe and the Mediterranean in this context. A particular attention was paid to local stakeholders in their diversity and their perceptions of national and EU policies. We were looking to understand to which extent do these policies offer equal opportunities accessible for small farms and susceptible of improving their socio-economic conditions. We looked to include in our approach the gender dimension in terms of access to employment, decision-making and opportunities allowed by the hydro-agricultural policies.

We have followed a qualitative method that includes a literature review, a content analysis and semi-structured interviews with the different stakeholders: governmental institutions, private sector, NGOs, farmers, investors, agricultural inter-branch organizations, etc. An analysis of the

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different stakeholders' narratives was carried out to determine their perception of European policies.

This paper is both analytical and critical of the EU policies and actions in the fields of agriculture and water. In that sense, the MEDRESET project brings an original perspective of EU policies in Morocco and more generally in the South Mediterranean through its bottom-up approach which gives voice to local stakeholders (men and women) to reconsider these policies in tandem with local issues and expressed expectations. Moreover, the MEDRESET project seeks to suggest perspectives capable of improving EU policies in the fields of water and agriculture and other key fields such as: migrations, human rights, energy, etc.

1. GENERAL PRESENTATION OF THE AGRICULTURE AND WATER SECTORS IN MOROCCO

1.1 AGRICULTURE AND WATER IN MOROCCO: KEY FIGURES

In Morocco, the agricultural sector constitutes the backbone of the socio-economic fabric with a contribution varying from one year to another between 11 to 18 per cent of the GDP. The utilized agricultural area is 9 million ha divided between 1.5 million farms. Nevertheless, the land structure is marked by deep inequalities, concentration and fragmentation. The figures of the 1996 General Agricultural Census indicate that more than 75 per cent of farms have less than 5 ha of land and 55 per cent have less than 3 ha; while farms larger than 20 ha account for one third of the utilized agricultural area, yet they only represent 4 per cent of farmers (Akesbi et al. 2008: 129).² Landless farmers represent 4.3 per cent of total farmers. Eighty-one per cent of farmers are illiterate and exploit 76 per cent of the utilized agricultural area. Micro-property and fragmentation compel one out of five farmers to practice several activities for subsistence. The agricultural area is reserved for cultivations that are typically Mediterranean: 60 per cent cereals, 2 to 5 per cent vegetables and industrial cultivations, 7 per cent mainly olive and citrus trees (Akesbi et al. 2008: 129, 9).

Agriculture remains the first job-creating economic sector in the country (4 million assets, 80 per cent of rural labour).³ According to the statistics of the High Commission for Planning (HCP), 23.6 per cent of women are involved in labour at the national level, 16.6 per cent of which are present in the urban setting and 34.9 per cent in the rural setting. The percentage of women in the working population is 26.3 per cent at the national level, 21.2 per cent of which are in the urban setting and 32.3 per cent in the rural setting (HCP 2018: 17, 19, 21). The agricultural labour force is mainly comprised of women and youth who work in overall precarious conditions (El Himer 1999, Bouzidi et al. 2011). In fact, 93.2 per cent of the female rural labour force is recruited by the agricultural sector, around one third of which are less than 19 years old and 7 out of 10 are illiterate (HCP 2013: 6–7, 9).

² Farms of more than 100 ha occupy 8.7 per cent of the utilized agricultural area, although they represent 0.2 per cent of farmers (Akesbi et al. 2008: 129).

³ 13.5 million of the rural population are 80 per cent dependent on agriculture.

However, the labour of rural women, despite its importance, remains mostly invisible, unpaid and unrecorded by national statistics (Dammame 2005, Moisseron et al. 2017). Seasonal work is informal despite its preponderance and is not taken into account by the labour policy in the rural setting (Arab 2018). Work conditions for women labourers remain mostly precarious with low pay, a significant absence of social rights and an exposure to violence within the farms that recruit them (Bouzidi et al. 2011, Arab 2018). It's important to mention that unpaid labour concerns 40 per cent of labour in the rural setting, 74 per cent of which are working women and 68 per cent are young workers aged less than 25 years old (Bentaibi 2016).

Furthermore, the issues facing the agricultural sector are not limited to the economic aspect only; they also concern food security, the balancing of territories and the management of natural resources and their sustainability. Since the 1980s, the policies carried out to ensure food security – by improving the availability and accessibility of staple food, namely for the poorest populations – have known many failures (Sayouti and Ait El Mekki 2015). On one hand, the current orientations and political choices in terms of production don't show the slightest concern to safeguard the country's food security. On the other hand, the country's production and growth rates still strongly depend on weather conditions (precipitation and droughts) (Akesbi 2014: 23–4).⁴

To ensure the country's water and food security and socio-economic development, the water sector has always benefited from public authorities' particular attention (CESE 2014). According to the State Secretariat in Charge of Water, Morocco possesses relatively important water resources: the hydro-potential available is estimated at 22 billion m³ (18 billion m³ of shallow water and 4 billion m³ of groundwater) (MEM 2012: 3). Irrigation development has covered 1.5 million ha, two thirds of which are supplied by the Government. The energy recovery of water structures according to the supervisory ministry accounts for 10 per cent of the national energy production (MEM 2012: 9). Out of 103 listed aquifers, 21 are deep and 82 are shallow. The most important aquifer systems cover a total area of around 80,000 km², i.e. about 10 per cent of the territory.⁵ However, due to demographic growth, climate change and the increasing pressure on resources, the volumes of available water tend to drop significantly. During the 1960s, the quantity of water per capita was 3,500 m³ per year (Dahan et al. 2017: 5). In 2017, it reached according to the latest figures 600 m³, far lower than the water stress threshold (El Aissi 2017). The American think tank World Resources Institute has conducted a study on the situation of water resources in 167 countries, including Morocco (Luo et al. 2015). The report indicated that the situation of resources is likely to worsen during the next 25 years. The Moroccan Kingdom is listed among the 33 countries threatened and ranks 19th. If nothing is done, the deficit in renewable resources would reach 1.5 billion by 2040 and the exploitation of underground aquifers would continue all throughout this period.

4 A food dependency in terms of staple products is "concerning: less than half for soft wheat and sugar, almost the total of corn and seed oils, around one fifth for dairy products" (Akesbi 2014: 25).

5 See the website of the Water Department at the Ministry of Equipment, Transport and Logistics: *Ressources en eau*, <http://www.water.gov.ma/ressources-en-eau>.

1.2 THE MAIN POLITICAL AND LEGISLATIVE ASPECTS RELATED TO THE FIELDS OF AGRICULTURE AND WATER

1.2.1 NATIONAL LEVEL

Since the end of the structural adjustment programmes in the mid-90s⁶ till 2007, the agriculture in Morocco has known no development strategy (Akesbi 2014: 26–7). Following the surge in the prices of agricultural goods in the international markets between 2006 and 2008, the World Bank recalls in its 2008 annual report the key role of agriculture in terms of agricultural development and the fight against poverty. The comeback of agriculture on international agendas was translated in Morocco by the launch in 2008 of a new wide-ranging agricultural strategy called the Green Morocco Plan (*Plan Maroc Vert*) (Akesbi 2011a, Bouzidi 2015).

The Green Morocco Plan aims at rehabilitating agriculture, providing it with the means it lacks and making it “the main engine of growth and in the fight against poverty in Morocco” at the horizon of 2020. Therefore, it does not aim for less than a 70 to 100 billion dirham rise in the agricultural GDP through an additional agricultural production estimated between 6 and 9 billion euro, the creation of 1.5 million additional jobs in the sector, 1,000 to 1,500 investment projects, and an increase by 2 to 3 times of agricultural revenues for a rural population of 3 million people (a 300 per cent increase in revenues of around 3 million people in poverty) (Akesbi 2014: 28).

The Green Morocco Plan aims to achieve the sector's growth amongst competitive sectors, while guaranteeing the support of other complementary sectors. These two major options constitute the two pillars on which the new strategy is based. The goal of Pillar I is to develop an agriculture that's efficient, modern and adapted to the market rules, thanks to a new wave of private investments around new models of aggregation entrusted to agri-businesses. This pillar is shaped around a new concept of aggregation, i.e. “models carried out by investor farmers, with high management capacity, constituting cores endowed with sufficient productive areas [...], and aggregating around them dozens of small and medium farmers, so as to reach interesting sizes and thus synergies (200 to 2,000 ha)” (Akesbi 2011b: 15).

In parallel to Pillar I, Pillar II develops an approach oriented towards another type of agriculture said “supportive” or “traditional”, in difficult or marginal areas, and aims to fight poverty and significantly increase the agricultural revenue. Besides these two pillars, strategic actions qualified as “cross-cutting actions” were carried out. These had to touch upon the concession of collective and state-owned territories, sustainable and rational water management, the modernization of distribution, the enhancement of inter-branch organization, as well as the reform of the Ministry of Agriculture and State supervision. It should be noted that 3/4 of the budget allocated to cross-cutting actions are meant for Pillar I. By recording the budget allocations foreseen per capita benefiting from these investments, we reach a ratio of 1 to 9 in favour of Pillar I (cf. Table 1) (Akesbi 2011a).

6 The Structural Adjustment Programmes (1983-1993) translated into the State's disengagement from activities where it used to be a wide presence, important budget restrictions, the liberalization of production and trade structures to open up to the global economy and adapt the allocation of resources to the market logic.

Table 1 | Summary of the number of projects and farmers and the budget under the Green Morocco Plan

		Pillar I	Pillar II	Total
Number of projects		961	545	1,506
Investments (billions of dh)	Pillars	75	20	95
	Cross-cutting actions	-	-	52
	Total	-	-	147
Number of targeted farmers		562,798	854,856	1,417,656

Source: Bouabid (2010: 23).

However, if the positive impact of the Green Morocco Plan is highly noted in terms of the increase in the agricultural investment rate, it is difficult to measure its socio-economic impact on different types of farms. Global numbers given by the Ministry of Agriculture do not have much to tell. If some big farms see their production increasing, they can modify the national total with no actual change happening to the whole of the farms, for instance (Errahj 2018). Some studies estimate that impacts on the social level would be very uneven (Belahsen et al. 2016).

Akesbi (2012) notes that this agricultural strategy relies on the development of a farming model that does not take into account the issues of food security and food sovereignty (Akesbi 2013, Faysse 2015). Along with the social aspect, the Green Morocco Plan faces the issue of sustainability and the environmental impact, especially with its farming logic inciting investments on a large scale and putting into place subsidy mechanisms and a tax-exemption policy for the agricultural sector that brings benefit mainly to big producers (Belahsen et al. 2016). As a result, these mechanisms increase the pressure on natural resources, which does not promote social equity nor environmental sustainability.

Like many developing countries, Morocco relied since its independence on the development of irrigation to promote its social and economic development. A control and mobilization policy of water resources was then implemented through the building of large impounding dams and water transfer structures. According to the supervisory ministry, this policy has granted the country 139 large dams bringing the total capacity to almost 17.6 billion m³ and thousands of boreholes and wells collecting groundwater.⁷ The positive impact of hydro-agricultural schemes was undeniable despite the imbalances caused by "this highly selective policy" (Jouve 2006: 52). Morocco is still among the countries where natural resources are most vulnerable.

For instance, ground water overdraft has led to a significant decrease in piezometric levels. With regards to citrus cultivation in El Guerdane (an area of 10,000 ha), the constant drawdown of aquifers at a speed of over 2 metres per year leads to abandoning cultivations at a current rhythm of 200 ha/year (2,000 ha were abandoned by 2008). Similarly, official numbers estimate that the level of the Sais aquifer will drop 2 metres each year, i.e. an annual deficit of around 100

⁷ "Le traitement des eaux usées, remède au stress hydrique", in *Le Matin*, 21 March 2015, <https://lematin.ma/journal/2017/le-traitement-des-eaux-usees-remede-au-stress-hydrique/269194.html>.

m³ of water. A piezometric record has witnessed a decrease of around 100 metres between 1980 and 2011 (Del Vecchio and Mayaux 2017: 108).

Since 1995, the Moroccan State carried out reforms aiming to modernize the sector, namely through the enactment of the Water Law (10-95) introducing an integrated and decentralized management of water resources, with the creation of basin agencies and the preparation of texts for the application of "user-pays" and "polluter-pays" principles and the enhancement of water resources and their protection against contamination and overexploitation. This law was reflected by the implementation in 2001 of the National Water Plan in collaboration with the different ministerial departments and bodies involved in the water sector. In terms of catchment basins, the regulation of extractions must take place in the framework of regional steering plans (*Plan directeur d'aménagement intégré des ressources en eau*, PDAIRE), also introduced by the 1995 law to draft the summary of water resources for each basin (Del Vecchio and Mayaux 2017: 108).

In November 2015, the chamber of representatives adopted a new law (36-15) to consolidate the previous Law 10-95 that was approved by the government and published in the official gazette in August 2016. The main inputs of this law include: (i) improving governance and participatory management at the national level; (ii) protecting water resources, by organizing boreholes and well drills through enforcing an authorization procedure; (iii) establishing an institutional framework and protection mechanisms against extreme phenomena (droughts and inundations); and (iv) using and enhancing unconventional water resources (the reuse of sewage water, desalination of sea waters). Therefore, Morocco has adopted in 2015, with a vision to fight climate change, a resilience enhancement plan to achieve a 100 per cent rate of sewage water purification and irrigation water saving of 2.4 billion m³ per year at the horizon of 2030.

In the agricultural field, Morocco introduced in 2007 an ambitious irrigation water saving programme that aims to convert 550,000 ha of localized irrigation by 2022 (Belghiti 2009, Benouniche et al. 2014b: 36–7). Designed in 2007, then integrated in the Green Morocco Plan in 2008, and in the National Water Strategy in 2009, the National Irrigation Water Saving Programme (*Programme national d'économie d'eau en irrigation*, PNEEI) aims at developing economical water irrigation techniques such as the drip irrigation technique to "produce more and better with less water resources and in a more sustainable way" (Benouniche et al. 2014b: 37).

PNEEI presents the drip irrigation technique as the "most efficient irrigation technique with results reaching an efficiency rate of 90 per cent if not more" compared to gravity irrigation which is considered the least efficient, not exceeding according to official estimates in Morocco 50 to 60 per cent (Benouniche et al. 2014b: 38). The State is allocating a budget of 37 billion dirhams to this programme and suggests subsidies to drip irrigation installations (currently between 80 and 100 per cent with different ceilings defined) in order to encourage farmers to adopt this technique. The programme foresees a total water saving of 826 million m³/year, divided between the large-scale hydraulics and the private irrigation zones (Benouniche et al. 2014b: 38).

However, "this goal leads to confusion, because it's usually integrated in the goal to improve agricultural production" (Benouniche et al. 2014b). The works of Benouniche et al. (2014a) highlight the predominant finding of overdraft for most systems with an irrigation efficiency lower than that found in gravity irrigation. The expansion of agricultural areas encouraged by the Green Morocco Plan and the agricultural intensification and overirrigation do not contribute

to achieving the water saving goal. Furthermore, State subsidies to localized irrigation under the Green Morocco Plan have encouraged the development of large-scale localized irrigation (Errahj 2018).

1.2.2 INTERNATIONAL LEVEL

Since the mid-1980s, Morocco has made the strategic choice to be integrated in the international trade and investment flows. In that sense, Morocco adhered in 1987 to the General Agreement on Tariffs and Trade (GATT) and in 1994 became a member of the WTO during the Marrakech Agreement. A series of free trade agreements were signed (Morocco–EU, Morocco–USA) offering big possibilities in terms of investments and exports from Morocco. Other agreements were signed with countries of the South Mediterranean aiming to strengthen the commercial relations with these countries: free trade agreement with Turkey, Agadir Agreement (Morocco–Tunisia, Egypt, Jordan), the West African Economic and Monetary Union, and the Economic and Monetary Community of Central Africa.

Morocco is the only country along Jordan to benefit from an advanced status with the EU, which allows it to have important financial supports, within the framework of a broader dynamic to liberalize the trade of agri-foods. The Morocco–EU agricultural agreement, which entered into force on 1st October 2012, foresees among others the facilitation of exports for fruits and vegetables, and olive oils from Morocco to the EU, and a progressive reduction of custom duties on the European agri-food industry products and staple goods (cereals and beef) exported to Morocco. The dynamic introduced by the Green Morocco Plan since 2008 was strongly supported by national and international funders: 15 international funders, Hassan II Fund, and the national banking sector (Lemaizi 2015). Bilateral partners supporting the Green Morocco Plan are the EU, France via the French Development Agency (*Agence Française de Développement*, AFD), Belgium via Enabel (former Belgian Technical Cooperation, BTC), Germany via KfW, Japan via the Japan International Cooperation Agency (JICA), Saudi Arabia via the Saudi Fund for Development, Kuwait via the Kuwait Fund for Arab Economic Development, and Qatar via the Qatari Fund.

Based on the analysis of the documents provided by the Ministry of Agriculture, the multilateral partners supporting the Green Morocco Plan are: the World Bank, the African Development Bank, the European Investment Bank (EIB), the International Fund for Agricultural Development, the Arab Fund for Economic and Social Development, the Islamic Development Bank, and the Global Environment Facility. For the EU, the National Indicative Programme for Morocco (2007–2010) set a goal to upgrade the agricultural sector and enhance local produce in order to ensure the diversification of activities and the creation of new remunerating and sustainable trading niches (European Commission 2007).⁸ The EU support to the agricultural sector is perfectly in line with the national strategies, namely the Green Morocco Plan, and covers mainly the following fields: (i) PNEEI/irrigation extension programmes (in the form of a 43 million euro loan from EIB);⁹ (ii) Pillar II related to supportive agriculture; (iii) institutional reforms; (iv) rural development; (v) the Agricultural Council.

⁸ See also European Commission (2010).

⁹ For more information on all multilateral and bilateral cooperation projects in the field of water, please consult the website of the Water Department of the Ministry of Equipment, Transport and Logistics: *Coopération multilatérale*, <http://www.water.gov.ma/cooperations-et-partenariats/cooperations/cooperation-multilaterale>.

The EU supports the directorate of agriculture through two programmes:

1) A support for the National Strategy of the Agricultural Council in the form of a donation of 16 million euro. According to the Ministry of Agriculture, this support programme aims at strengthening the governance of the agricultural council, offering a council of high quality accessible for small producers and consolidating the expertise of agricultural councillors in order to meet the "needs of small producers" (MoAF 2013). In this context, the National Office of the Agricultural Council (*Office nationale du Conseil agricole*, ONCA) was established in 2013 to achieve these goals (El Amrani 2017).

2) A support for the agricultural sectorial policy (*Programme d'appui à la politique sectorielle agricole du Maroc*, PAPSA): this programme is financed by a donation of 70 million euro and dedicated to the second pillar of the Green Morocco Plan related to supportive agriculture. The Ministry of Agriculture is this programme's beneficiary. According to the instruments provided by the Ministry of Agriculture, a strategic monitoring group was established to ensure follow up on its implementation. The strategic monitoring group is comprised of representatives of the ministry (Directorate of Finance and Directorate of Strategy and Statistics), the Agricultural Development Agency (ADA), the Ministry of Finance and other institutions and human resources. This programme, stretching on a period of 36 months, aims for "the sustainable empowerment of the agricultural sectors mostly linked to small farmers by promoting the improvement of production bases and a sustainable management of natural resources" (Berahmani et al. 2015: 7). The PAPSA interferes mainly in four regions of the country: Drâa, Oriental, Boulemane province and Tafilalet. This programme is mainly oriented towards small farms through the establishment of projects of intensification and/or professionalization in four priority sectors: red (sheep) meat, date palm, olive cultivation and local produce, namely truffles (Berahmani et al. 2015: 7).

2. QUALITATIVE ANALYSIS OF THE STAKEHOLDERS IN THE FIELDS OF WATER AND AGRICULTURE

2.1 FIELD SURVEY

The field study is based on a qualitative approach consisting in identifying the main stakeholders operating in the fields of water and agriculture and interviewing them by using a guide of semi-structured interviews.¹⁰ The interview guide is comprised of 3 main axes: (1) the context and general information on the interviewed stakeholder and their institution; (2) main issues detected in the fields of water and agriculture; (3) the public policies in the fields of water and agriculture and the stakeholders' perception of the EU policies in these two fields (cf. annex 2 for the questionnaire).

The launching of the Green Morocco Plan in 2008 was reflected by the implementation of an important reorganization within the Ministry of Agriculture, especially through the creation of many agencies and institutions (ONCA, ADA, National Agency for Development of Oasis Zones

¹⁰ We would like to thank Zakia Kchichech, Abdellah Hmouri, Sanae Attima and Soufiane Lachheb for their participation in the field survey.

and the Argan Tree, Regional Departments of Agriculture) to support the implementation of this ambitious strategy. These different institutions ensure several missions (agricultural council, rural development, subsidies programmes, etc.) to support the Green Morocco Plan and they are in contact with the EU through funding and budget support programmes for the implementation of a new agricultural strategy. It was thus essential to integrate them in the first phase of interviews and to choose interlocutors who convey the speech and vision of their institution and are in charge of the partnership and cooperation projects with the EU. The Green Morocco Plan induces a very important dynamic with a strong mobilization of the stakeholders. For this reason, we needed some time to schedule and set-up the interviews. During our first field investigations, it appeared that the agricultural policies remain strongly centralized, namely following the launch of the Green Morocco Plan.

During the first phase of investigations, we held 35 interviews in different regions of the Kingdom between June and November 2017. We made sure to integrate the gender dimension in our approach. Our interviews with different stakeholders included 12 women out of 35 interviewees, although we noticed that those women were poorly represented in their professional agricultural organizations. In the light of our interviews, we were able to classify the stakeholders in the fields of water and agriculture into four categories: (i) institutional stakeholders (9 interviewees); (ii) agricultural research and education institutions (3 interviewees); (iii) professional agricultural organizations (18 interviewees); (iv) farmers and investors (5 interviewees) (cf. annex 1 for the list of interviewees). However, the time constraint and the unavailability of the interviewees, who we've contacted several times in vain, did not allow us to include the agricultural inter-branch organizations in our interviews. These stakeholders were interviewed at the second phase of the MEDRESET investigation.

During the second phase of the MEDRESET investigation, we have conducted 17 interviews (cf. annex 1) including 9 women. We had a particular focus on professional agricultural organizations (3 male and 8 female), among which 5 women organizations having either benefited or not from EU support. We have also targeted the category of farmers and investors: 4 investors, including 3 exporters of agricultural products, in order to analyse their perceptions on trade policies with the EU in terms of some export-oriented sectors (olive trees, citrus, tomato, strawberry, etc.); and 6 small and medium-sized farmers, including 2 young farmers and a woman. Finally, we managed to hold an in-depth interview with the inter-branch organizations, namely the inter-branch federation in charge of organic agriculture. The observations and interviews of this second phase were carried out between December 2017 and April 2018. The second phase has thus allowed to extend some interviews and go into further details.

2.2 THE STAKEHOLDERS' PERCEPTIONS OF AGRICULTURAL POLICIES

The interviews with different stakeholders also involved different players in the fields of water and agriculture. These players have a different perception and assessment of the current situation and future of the agricultural sector. For the institutional stakeholders, we have interviewed representatives of institutional stakeholders in charge of the relations with international partners, the EU in particular. For these stakeholders, the agricultural sector has witnessed a significant development during the last ten years, namely with the establishment of the Green Morocco Plan, which led to a clear revitalization of the sector and an important modernization of the agricultural production. The enhancement of agricultural sectors, the State support provided to develop new cultivations with a high added value (arboriculture

in particular) and the subsidy and investment incentive mechanisms are referred to as major indicators of the progress made thanks to the Green Morocco Plan (Interviews 1 to 8).

The analysis of instruments provided by the Ministry of Agriculture shows big ambitions for the Green Morocco Plan in terms of promoting cultivations of high added value, contributing to food security and fighting poverty (MoAF 2008, Akesby 2012: 13). These instruments do not specify much whether or not these incentive mechanisms will be accessible to small and medium-sized farmers and to which extent, while the instruments focus clearly on the quantified goals that must be met at the horizon of 2020. The diagnostic of the Green Morocco Plan's positive outcomes is shared by a good number of investors who have gained support in the context of Pillar I for setting cultivations with high added value (plantations and market gardening), on private lands or through access to land contracts or concessions on public or collective lands (Interviews 31, 32, 45, 46). For these investors, the Green Morocco Plan provides investment opportunities and the development of a lucrative agriculture meant for the both local and international markets (Interviews 31, 32, 45, 46).

For small and medium-sized farmers, the support granted by the Green Morocco Plan did not benefit all farmers on equal footing. According to most interviewed small farmers, having benefited or not from the Plan, this plan hasn't changed much of their socio-economic conditions, while it has evidently promoted big producers and investors (Interviews 33, 34, 35, 45, 46, 47, 48). They still see the agricultural activity strongly dependent on weather conditions and unstable agricultural markets; these constitute two major issues to which the Green Morocco Plan has no answer (Interviews 33, 34, 35, 45, 46, 47, 48).

Despite the fact that the Green Morocco Plan is supposed to provide support to farmers, this support involved mainly farmers who have at least 4 or 5 ha of irrigated land for example for the drip irrigation technique. It's unfair to small farmers in rainfed areas, especially that our region suffers from an alarming water scarcity, while the drip irrigation technique promoted by the Green Morocco Plan remains largely inaccessible to farmers of this region, whose overwhelming majority is poor. (Interview 37)

For small farmers who have not benefited from the Green Morocco Plan support (Interviews 33, 46, 47, 48), this strategy does nothing more than increase the wealth of the richest farmers without changing the situation of small farmers, which becomes the more difficult under unfavourable weather conditions, expensive agricultural inputs and price fluctuation on the market, fragmentation and the small size of plots. In the field of agricultural water, water basins agencies are sounding the alarm concerning the risk of ground and shallow waters overdraft, which is related to the farming model promoted by the Green Morocco Plan (Interview 9). These agencies also highlight the need to implement the law provisions on water (aquifer contract, water police, polluter-pays) and recall the importance of plans established in the perspective of enhancing resilience through sewage water purification projects and the desalination of sea waters (Interview 9).

2.3 ISSUES AND PRIORITIES OF THE AGRICULTURAL AND WATER SECTORS

Moroccan agriculture is facing a number of issues and challenges that limit its profitability and the sustainability of the economic models introduced under the Green Morocco Plan. These issues are differently perceived and voiced by different stakeholders. In this section, we will

analyse the issues as expressed by the different categories of stakeholders:

2.3.1 INSTITUTIONAL STAKEHOLDERS

The perception of issues varies from one stakeholder to another based on their situation at the central, regional or local level. At the central level, climate change, especially low precipitation and droughts, remains a major obstacle to the development of agriculture and the implementation of a strategy as ambitious as the Green Morocco Plan (Interviews 2, 4, 8). The second issue is related to the market constraint associated to the price fluctuations in the agricultural markets and the lack of organization for producers and agricultural sectors, among others (Interviews 1, 2, 3, 4, 5, 7). In the face of these different issues, the Green Morocco Plan has put forward, according to several representatives of the ministry, an arsenal of regulatory and incentive measures for the organization of agricultural sectors and the promotion of rural development. For this reason, PNEEI is considered an initiative aiming to limit the risks of climate change, related to the scarcity of precipitations, the increasing pressure on shallow waters and the decrease in the piezometric level of shallow and deep aquifers (Interviews 2, 3, 4, 5, 6, 8). The drip irrigation technique is presented as the most efficient irrigation system that can meet the twofold goal of water saving and increase in production (Interviews 2, 3, 4, 5, 6, 8). Aggregation is presented as an alternative to issues including marketing and lack of organization for producers and agricultural inter-branch and as an institutional innovation in terms of transfer and accountability of professional agricultural organizations (Interviews 2, 3, 4, 5).

The restructuring of the Ministry of Agriculture and the establishment of new directorates, divisions and offices for rural development, the agricultural council, and health security among others, is considered by the ministry's representatives (Interviews 1, 2, 3, 4, 5, 7) as a positive progression towards good governance for the sake of a professionalization of the State-farmers relations.

Farmers have never received as much support as today thanks to the Green Morocco Plan. What might they need? To ask for subsidies, they only have to address the only office "*guichet unique*" at the Provincial Directorate of Agriculture or the Regional Directorate. As per the agricultural council, there's the ONCA established as regional structures. For phytosanitary issues, there's the National Office for Health Security of Food Products [*Office national de sécurité sanitaire des produits alimentaires*, ONSSA] and for all agricultural issues there is the Regional Directorate of Agriculture. (Interview 4)

At the regional and local levels, there are stakeholders who maintain direct contact with farmers for subsidies demands and access to lands, or even through supervising and organizing training, counselling and technical support sessions for farmers. These stakeholders (Interviews 1, 3, 5) share the diagnostic of the ministry's agents at the central level as to the strong dependence of agriculture on weather hazards and market risk. They add other structural issues that impede the agricultural development and the implementation of the Green Morocco Plan. Such issues include the inadequate land structures (narrowness and fragmentation of most farms) and anarchic farming methods, among others (Interview 1). More than 70 per cent of farms have an area of no more than 5 ha. These areas are often scattered, fragmented and subject to litigation, which constitutes a real obstacle to their promotion. All these factors make the new agricultural strategy the more inaccessible to small and medium-sized farms which represent the majority of farms according to the field agents (Interviews 1, 3, 7).

Nowadays, Moroccan agriculture is a sector in progress but at different speeds. It's clear that big farms are adapting well but the question goes for small and medium-sized farmers. Small and medium-sized farmers are trying to manage but there's always the issue of the market. Therefore, there is a certain dynamic, one that does not allow however for a sustainable development of these farms namely in terms of the unstable market constraint, access to water, access to lands. We can say that most small and medium-sized farms are in crisis. (Interview 1)

2.3.2 AGRICULTURAL EDUCATION AND RESEARCH INSTITUTIONS

The unstable weather conditions, the water crisis, the ground-water overdraft, the phytosanitary diseases, the quality of agricultural products, the uncertainty of agricultural markets, the illiteracy rate rising above 70 per cent in rural areas, and micro-property all present the main challenges underlined by the agricultural education and research institutions (Interviews 10, 11, 12). Research papers and end-of-study dissertations address these subjects in different Moroccan regions (Zebakh and Finance 2017). Similarly, international research projects (such as EU Framework Programmes, Tempus, Erasmus) in collaboration with European institutions (French National Agency for Research, French Agricultural Research Centre for International Development, French National Institute for Agricultural Research, French National Research Institute for Sustainable Development, AFD, CIHEAM, etc.) cover research related to these different challenges (water saving, ground-water saving, sustainability of irrigated systems, etc.). Some researchers have a critical view on the Green Morocco Plan strategy and its inability to face some structural problems in the agricultural sector:

We have not yet succeeded in seriously addressing the climatic hazard as a structural issue of Moroccan agriculture. The choice of agricultural species and varieties promoted by the Green Morocco Plan (plantations and cultivation of high added value) does not go in this direction. Furthermore, the plan, by looking to increase the volume of plantations, inevitably leads to a drop in prices and enhances the market hazard. We are facing the dilemma of increasing production but for a national market that is unable to absorb full production. We are thus going round in a vicious circle. (Interview 10)

2.3.3 PROFESSIONAL AGRICULTURAL ORGANIZATIONS (PAOs)

The interviewed cooperatives, associations and economic interest groups (EIGs) underline the role of the Green Morocco Plan in the modernization of the agricultural sector, although most of them express their disappointment of the present inequalities when it comes to accessing advantages granted by this plan (land concession, subsidies, trainings, etc.). The support offered to small producers and professional agricultural organizations (PAOs) in the framework of Pillar II is deemed insufficient, unequally distributed between the country's regions and farmers and poorly adapted to the needs of the beneficiary population (Interviews 33, 34, 46, 47, 48). Pillar II of the Green Morocco Plan states as its objective the promotion of a so called supportive and social agriculture by encouraging the organization of small producers within associations, cooperatives and economic interest groups in order to promote local products (Argan, aromatic and medicinal plants, etc.). For the majority of the interviewed PAOs (Interviews 13 to 30 and 39 to 43), the low precipitation, the issue of marketing, the persistent informal sector, the array of intermediaries, and the low profit margins gained by small producers make their situation precarious compared to big farmers who benefit from most of the support provided by the

Green Morocco Plan. For example, the trainings offered by ONCA in matter of agricultural advice is often deemed inadequate or revolving around technical aspects (Interviews 14, 17, 18, 19, 27, 39, 40).

According to women, members of cooperatives, (Interviews 14, 16, 17, 18, 26, 27, 30, 39, 40, 41, 42, 43) which are most often implicated in activities corresponding to sectors non associated with production (product valorization, packaging, etc.), the support is directed towards aspects linked to production and cultivation techniques excluding women that find themselves sometimes obliged to send men to benefit from trainings on behalf of women cooperatives. These women rather demand a support that further targets valorization activities and marketing of their products that are not always sold in good conditions.

We are a women cooperative specializing in the valorization of dates (juice, syrup, cakes, etc.) but we're always offered trainings in agricultural technical processes and production management, which are generally masculine activities. When faced with this constraint, we send men from our families and villages to benefit from these trainings on behalf of the cooperative... we have no other choice! (Interview 17)

The question of access to land is often recurring acutely, especially for women and youth, because lands remain under supervision of fathers, which constitutes a real obstacle for setting up farming projects and benefiting from the state support. Such is the case for a cooperative of aromatic plants in the Tigrigra region (Interview 41) where women have to resort to small-sized agricultural collective locations in order to produce aromatic plants. These women addressed a file to the Ministry in order to gain access to a hectare of land as part of the Green Morocco Plan but their request was denied. The women criticize favouritism and injustice interfering in the process of land attribution.

This year we tried to make a request to the Agricultural Development Agency (ADA) to benefit from a hectare as project location. We had hope to get a better chance as a women cooperative but the prevailing favouritism, corruption and powerful investor's lobbies were stronger than our ambitions. Alas! (Interview 41)

Against this lack of access to land, some youth (men and women) resort to soilless projects (farming, rabbit keeping and bee-keeping, etc.) or indirect land use systems (location, association). Some of them solicit access to lands falling under state ownership which is the case of an association of an unemployed group of graduates in the El Hajeb region (Interview 19). This group of 11 graduates (5 young women and 6 young men) included sons of small farmers, aged between 22 and 30 in 2002 and all originating from the Meknes region. These young people had good experience in farming but did not have access to land. Therefore, they decided to create a development association in order to solicit access to a federal lot of 100 ha located in their rural municipality. Moreover, they led multiple mobilizations and long-term negotiations with the supervising administrations, which resulted in land attribution eleven years later in 2013. The duration of mobilization is at the same time a testament to the complexity of negotiations and the youth's tenacity in pursuing their demands.

In addition to the problem of land access, namely for youth and women, the problem of the market and the disposal of agricultural products constitutes a major challenge for the majority of PAOs. Some women cooperatives (Interviews 17, 39, 40) request support in exporting their

local products to international markets:

Besides production, the State must open doors for exporting to African and Asian markets. We mustn't remain dependent on the EU who privileges, before anything else, its own producers and interests. The State must not only focus its support on cooperatives and economic interest groups created as part of the Green Morocco Plan but also on organizations created by local initiatives. (Interview 40)

Furthermore, we note an expressed will to boost the creation of women cooperatives and associations in line with international funders' requirements that insist on attaining the required indicators concerning women and youth implication in order to trigger subsidies disbursement. However, some women, members of these organizations, deplore the way this support is managed and the inability of new initiatives to relieve rural women from their precarious situations and enhance their autonomy (Interviews 17, 26, 39, 27, 41, 43). Some women members of PAOs question the inequalities, which the Green Morocco Plan does nothing but further reinforce and the favouritism benefiting some PAOs namely in the south of the country (Interviews 14, 16, 17, 18, 30, 39, 42, 43). Such is the case for some women cooperatives that were able to develop their activities on a large scale, especially Argan cooperatives that have benefited from the support of many funders as part of the Argan project (GIZ, AFD, EU, USAID, etc.). In this context, we noticed a concentration of funders compared to other areas where there is a lack of important development initiatives and funders' presence.

2.3.4 FARMERS AND INVESTORS

The Green Morocco Plan stimulated a new wave of investments thanks to the implementation of incentive measures for land access and new irrigation techniques (drip irrigation, pumping by solar energy). Many investors including locals and people working non-agriculture-related jobs (doctors, lawyers, public officials, etc.) have integrated the agricultural sector after the establishment of the Green Morocco Plan. These investors are increasingly becoming key players in the agricultural sector.

I was born and raised in France. I decided to return and invest in my country to take over the job of my grandfather who is a farmer: The Green Morocco Plan, thanks to the different possibilities it grants, encouraged me to return to the country to plant trees and install fruit storing and conservation units. (Interview 51)

However, the interviewed small farmers remain mostly pessimistic regarding the Green Morocco Plan's capability to change their socio-economic situation:

The agricultural sector in Morocco is witnessing a total metamorphosis; following the launch of the Green Morocco Plan the agricultural landscape changed significantly but the main question is who gets to benefit from these changes! It's clear that we cannot say today that the Plan benefits everyone; small farmers and women associations and cooperatives have difficulties receiving State support. (Interview 43)

The land issue remains a sensitive question and small farmers (Interviews 33, 34, 45, 46, 47, 48) criticize the interference of investors mostly of neo-farmer citizens in the rural world.

An association for the defence of collective lands in El Hajeb region was born to counter investors who exploit tribal collective lands through purchasing agreements or long-term leases (99 years) often strongly contested by shareholders of these collectives:

In the face of this monopolization the solution is to get rid of these new colonialists (the investors "as was the case for the French and the Spanish"); another alternative is to mobilize human rights organizations that do not have local authorities or international NGOs to support our legitimate claims of the right to the land of our ancestors. (Interview 42)

2.4 ASSESSMENT OF THE EFFICIENCY AND POTENTIAL OF THE EU'S TRADE AND ASSISTANCE POLICIES

The third axis of our interview guide focused on the assessment made by different stakeholders on European policies regarding assistance, cooperation and trade. Out of the 26 interviewed PAOs (cooperatives, associations and economic interest groups), only three EIGs benefited from EU support, via the national initiative for human development, launched in 2005, or thanks to the Green Morocco Plan. The EU contributed in funding the purchase of material and projects implicating women. Six cooperatives situated in the oases of Tafilalet, Figuig and Guelmim benefited from the support of the Belgium Technical Cooperation (BTC), the Millennium Challenge Account US programme and the Japanese JICA. Four organizations benefited from the support of ONCA in terms of technical council and the second pillar of the Green Morocco Plan with the support of the PAPSA programme. A women cooperative for Argan in the Sousse benefited from EU support as part of the Argan project in 2009, while other organizations did not receive any EU support.

In our opinion, the relatively low EU visibility can be attributed to the sampling bias but also and mostly to the EU's particular approach in passing through national institutions (ONCA, ADA, the ministry, etc.) and focus on budget support allocated to the Ministry of Finance and disbursed by the Ministry of Agriculture which directs it in accordance with its Green Morocco Plan strategy (Interviews 2, 4, 7). Therefore, we are not dealing with a support based on the direct funding of local projects. Funders' approaches are different, says one institutional representative:

Each funder has a specific approach. For example, BTC has contributed with a grant of 33.5 million euro divided into two projects for growing almond, argan, saffron and dates essentially in oases, in the Oriental and the Arganerie areas. The BTC is an approach by local project and is of proximity (training, plantation, equipment, support to EIGs). The World Bank, the African Development Bank and JICA come as a support to reforms meaning that they are an upstream support at the institutional level. For example, the World Bank supported the establishment of master plans of wholesale market orientation schemes for fruits and vegetables. The European Union rather gives funding in the form of budget support. (Interview 4)

The institutional stakeholders (Interviews 1, 2, 4, 7) underline the role of the Green Morocco Plan in the stimulation of conventions and bilateral and multilateral partnerships in the fields of water and agriculture. The EU is considered as a privileged partner of Morocco for supporting this plan.

The EU is the first funder to support the establishment of the Green Morocco Plan by means of budget support in complementing Pillar II. The first set programme is called PAPSA I: a support programme to the sectorial agricultural policy in the form of a 70 million euro grant in 2010. The funds were paid to the State treasury and the technical department carries out the programme that implements and establishes the PAPSA I with the funder. (Interview 2)

Before launching the Green Morocco Plan, the EU support to the Ministry of Agriculture was in the form of direct support to rural and agricultural development projects. After the implementation of this strategy, the EU reoriented its assistance strategy to budget support directly paid to the State Treasury at the level of the Ministry of Finance with which the different ministerial departments must negotiate access to these funds. Through our interviews (Interviews 2, 4, 7) we were able to conclude that the Green Morocco Plan contributed significantly to the total restructuring of the balance of power between the stakeholders in the Ministry of Agriculture on one hand and the different funder on the other. This strong strategy enhanced the power of Moroccan institutional stakeholders in negotiations and the creation of agricultural projects that answer to the national priorities in line with the Green Morocco Plan guidelines:

Before the Green Morocco Plan, during our work with the funders, we were rather yielding to their logic than building the projects together. We should say things as they are! With the Green Morocco Plan strategy, we effectively moved together to a co-building logic. This means it's no longer the funder who sets up projects, but rather the Ministry of Agriculture who develops projects with the support of the funder and his assistance team. (Interview 4)

The institutional stakeholders (Interviews 1, 2) estimate that relations with the EU are more efficient and collaborative than they used to be. Nonetheless, this strengthening of the Ministry of Agriculture's position is not followed by a real implication of farmers (especially small and medium-sized farmers) in identifying and implementing projects. Decisions are still strongly centralized and small producers are still confined to the status of beneficiaries rather than full stakeholders, this being based on our interviews with this category of stakeholders (Interviews 33, 35, 45, 46, 47, 48).

Officers in research and education institutions outline the progress made towards consolidating EU-Morocco cooperation in the field of research, especially after Morocco was attributed an advanced status in 2008 (Interview 11). The comparability of the Moroccan system of higher education, research and training with its European equivalent is one of the goals sought to be achieved, namely with previous achievements including: (i) adhering the training system to the Bologna process (LMD System) since 2003; and (ii) Morocco's active participation in European higher education programmes (Tempus, Framework Programmes, COST, etc.) (Interviews 10, 11, 12).

2.5 IMPLICATIONS OF THE EU-MEDITERRANEAN COOPERATION POLICY IN THE FIELDS OF AGRICULTURE AND WATER

The EU is considered a privileged partner in terms of its assistance policy that includes donations and focuses on rural development, in addition to its technical assistance policy. The institutional stakeholders having already directly worked with the EU (Interviews 1, 2, 3,

4, 7) underline this partnership's strategic interest in the fields of water and agriculture and emphasize on the professionalism and competence of EU staff.

The European Union is our primary partner in terms of support for the development project. The advantage is that the EU offers an important support in the form of donations and provides high quality expertise when it comes to either staff in charge of establishing projects with us or those that do the follow-up. These people are very competent which is beneficial for us; it promotes knowledge transfer and consolidates a two-way learning. (Interview 2)

Nevertheless, the different stakeholders highlight certain imperfections that must be improved in order to have a better cooperation with the European Union. This is the case for the late integration of technical assistance in the process of implementation of some projects supported by the EU. Some public stakeholders (Interviews 1, 5, 6, 7), namely at regional and local levels, are in favour of a technical assistance given at the local level like the one offered by the Belgian Technical Cooperation. The budget support instrument is deemed poorly adapted, contrary to the support directed towards more specific development projects.

We wish to enhance cooperation with the European Union and work on more programmes and projects, but in this case we must reinforce technical assistance from top to bottom to strengthen the structures in charge of establishing and following-up on programmes and plan a local technical support in order to manage the colossal work this entails. For example, the Belgian Technical Cooperation established an on-site project management unit (UGP) for technical assistance to establishing a project at a local level. (Interview 3)

The complexity and rigidity of EU procedures are often recurrent in our interviews with public stakeholders including those working in agricultural research and education institutions (Interviews 10, 11, 12).

My critical view over the EU concerns the relatively rigid procedures for implementing programmes, meaning that when conventions are developed we must strictly comply to them. The problem with the EU is that with the staff changing every three to four year we find ourselves every time dealing with new staff and consequently facing different interpretations of the conventions developed with previous staff. Sometimes, there is also rigidity concerning the deadlines set for the implementation of projects, and also concerning indicators even in the case of insurmountable risks that can sometimes prevent us from reaching these indicators 100 per cent. (Interview 2)

The stakeholders interviewed (Interviews 10, 11, 12) as part of education and research institutions underline the EU's commitment to the partnership with Morocco but indicate the complexity of the adopted political moves and approaches being both complementary and overlapping, which complicates this co-piloting. The European programmes require sometimes a broad expertise from stakeholders on the field. The intertwining of bilateral relations and regional partnerships in the European policies poses a complication for a country like Morocco by requiring it develops two complementary strategies, as expressed by a former officer at the Ministry of Higher Education and Scientific Research (Interview 11). In turn, researchers indicate a certain inherent weakness to the functionality of European projects at the level of Moroccan

institutions and universities: constraining rules of administrative and financial management, weak cooperation between ministerial departments, weak implication of the private sector, insufficient support bodies for Moroccan structures when it comes to European programmes, namely in terms of materials and structuring of European projects (Interviews 10, 11, 12).

Professional agricultural organizations (PAOs) with whom the EU sometimes maintains a cautious relationship (Interviews 13 to 30 and 39 to 43). According to these PAOs (Interviews 13 to 30 and 39 to 43), the EU must not support centralized and top-down policies, but should rather offer its direct support to development projects at the local level. Some PAOs (Interviews 39, 40) also criticize the EU's trade policies and the drastic conditions imposed on the access to the European markets.

The production cost of organic extra virgin olive oil in Morocco is higher than that in Europe where producers are submerged by aids and subsidies. In all cases, I think that Moroccan olive oil is not welcome in producing countries such as Italy and Spain. In these two countries in particular, we're not authorized to showcase our olive oil in agricultural fairs and exhibitions unlike France or Germany. In my opinion, the EU will never be seriously interested in supporting groups or cooperatives producing olive oil in Africa; they have pressure lobbies who defend the interests of their producers. (Interview 40)

This cooperative deplors the way Moroccan cooperatives are treated in some European agricultural exhibitions where their products are presented under the slogan of fair trade, which does not highlight enough the efforts invested in terms of preserving good quality:

To guarantee fair competition on the European market, the EU must offer us the same support it gives to European producer groups or retract all together its aids and subsidies. For example, in order to sell our olive oil in France, we have to put under the fair trade label that the products originates from landlocked areas of Morocco with multiple intermediaries. This puts us in the position seeking the pity of the European consumer, while our olive oil is of high quality and has even ranked third in a competition in Switzerland. (Interview 40)

Investors and agri-businesses in Morocco see the competition with the EU differently:

The relation with the EU also depends on competition by type of agricultural product. For olive oil, we are in competition with Spain, the world's number one producer exporting its olive oil all over the world. The same goes for the Italians, kings of trade who buy olive everywhere in the world, namely in Tunisia. We cannot go into the European market without passing by them. But to enter the European market, a step we're interested in making, we must build our brand and have our own value in the market. This requires a lot of effort to become known including in non-European markets. For citrus products, we are in competition with Spain, Turkey and Egypt. As per fruits, our competition is mainly Spain, France, Turkey, the Middle East and China. Our group is present in the Gulf region by exports of fruits. This market is interesting and large enough to absorb many producers, while the European market is quite saturated. (Interview 50)

Despite the difficulties underlined by investors and representatives of the professional agricultural organizations, Morocco possesses some comparative advantages in terms of exporting certain products to the EU, as pointed out by a federation of organic farmers:

Concerning the European market, namely in terms of organic agriculture, we hold the comparative advantage of geographical proximity, which strongly reduces the energy cost for the transit of products to Europe compared to other farther countries such as India, for example. (Interview 44)

Other associations (Interviews 20, 37, 38) even question the underlying logics and ideologies of the EU aid policies (fighting immigration, terrorism, drugs, etc.) and the lack of an asserted will to stimulate the socio-economic development of Southern States. "The EU does not grant aids for free. They're always conditioned in the context of a win-win relationship. We are well aware that if the EU gives with one hand it's only to take away with the other" (Interview 38).

Professional agricultural organizations (Interviews 13 to 30 and 39 to 43) clearly express their expectations and the way they wish the policies, cooperation and partnership with the EU would be reconsidered. According to one female representative of a women professional organization:

We really need a fruitful cooperation with the EU, one that would bring a high added value to our association in terms of exchanging experience, supervision and support. Regarding the financial support, we need a headquarters for our association, because for the moment we're part of Meknes Chamber of Agriculture, but we don't always have access to their facilities to hold our meetings and activities. The Moroccan Union of Agriculture still exerts its authority and masculine mentality in its relations with our association. We require financial support for our commutes and need to attend trainings in the field of agriculture. We have never benefited from EU support; we need to have direct discussions with EU representatives without intermediaries about the real problems we're facing. Finally, we ask for a follow-up that answers effectively to our needs and projects for the future. (Interview 43)

CONCLUSION

The MEDRESET project aims at assessing the role and efficiency of the EU assistance and trade policies in the fields of water and agriculture and reconsider them while taking local issues into account. In this context, we have led 52 interviews with different stakeholders in these fields in Morocco in a bottom-up perspective focusing on the local players' perceptions and narratives. Our interviews covered three main axes: (i) the issues of the water and agriculture sectors; (ii) the different stakeholders' perceptions of the EU policies; and finally, (iii) the EU policies' implications in this context and the possible ways of improvement.

Agriculture in Morocco is facing many issues and challenges that limit its profitability and the sustainability of its economic models introduced under the Green Morocco Plan. These issues are differently perceived and expressed by different stakeholders. According to institutional stakeholders, climate change (droughts, low precipitation, etc.), fluctuations of agricultural markets, the lack of organization of producers, micro-property, fragmentation, and inadequacy

of land structures for investment all constitute the main challenges facing hydro-agricultural policies in Morocco. To these issues, stakeholders concerned with agricultural research and education add the issues of phytosanitary diseases, quality of agricultural products, market instability and high illiteracy rates in rural areas. Furthermore, representatives of professional agricultural organizations emphasize the notorious role played by the Green Morocco Plan in modernizing the agricultural sector, although they express their overall disappointment towards the inequalities in accessing the advantages granted by this plan (land concessions, subsidies, trainings, etc.). The support allocated in the framework of Pillar II is often considered insufficient and ill-adapted to the real needs of the populations who are incapable of facing these structural constraints such as the lack of access to land, which does not allow a real support to be granted to the vulnerable categories.

Our interviews have shown that institutional stakeholders see the EU as a key partner, namely through its assistance policies (donations and loans). Since 2008, the EU has been strongly supporting the implementation of a national strategy called the Green Morocco Plan developed in 2008 through: (i) a support to the agricultural sectorial policy (PAPSA); (ii) a support to the National Strategy of the agricultural council; and (iii) loans from the EIB to follow-up on hydro-agricultural projects, including the national water saving plan. Nonetheless, institutional stakeholders seem critical, on one hand, vis-à-vis the budget support mechanism adopted by the EU, which makes them subject to constraints of hard negotiations on funds meant for the agricultural sector; and on the other hand, vis-à-vis the strict emphasis on reaching the indicators defined in numbers for the EU assessment required to trigger disbursements. These stakeholders also deplore the late programming at the end of the technical assistance projects set by the EU, that does not allow them, despite its relevance, to properly benefit as they should during the projects.

The strengthening of partnerships with the different components of the Ministry of Agriculture, namely at the central level, is not necessarily complemented by a real implication of local stakeholders (PAOs and small and medium-sized farmers). These stakeholders consider that by focusing on a budget support instead of a project support strategy, the EU is completely absent and invisible on the field. The farmers' direct interlocutors are ministry agencies and not representatives of the EU. According to PAO representatives, the EU has by consequence less visibility than other funders with which they maintain a direct contact (GIZ, Enabel, etc.) Some PAOs go the point of questioning the EU's objectives and its real willingness to support developing countries like Morocco, taking into account the multitude of geo-strategic issues.

In turn, stakeholders concerned with research and education point out to the progress made in consolidating cooperation between the EU and Morocco in the field of research (advanced status, adherence to the Bologna process, multitude of projects, Tempus, Framework Programmes, COST, Horizon 2020). Investors and exporting farmers (olives, tomatoes, citrus, strawberries, etc.) insist on the growing competition with European countries, the power of lobbying within the EU, the weight of tariff barriers and the European market saturation, forcing them to head further towards new markets (Sub-Saharan Africa, USA, Gulf countries, Russia). PAO representatives (organic extra virgin olive oil producing cooperatives) deplore the lack of opportunities, the unfair and unequal competition, and the unequal access to the European market which in general is yet blocked for them.

Finally, in the light of our analysis of the local stakeholders and their perceptions of the EU, some recommendations have proven to be insightful in order to better enhance the efficiency and potential of EU policies:

- Improving EU visibility through direct funding of local projects, rather than a budget support. This can be achieved on one hand by a largely presence on the field by organizing trainings, support and follow-up of local initiatives; and on the other hand, by strengthening local teams with an ability to conduct fieldwork more regularly. This could ensure a better capitalization of achievements and deal with the change of EU representatives every three to four years. These representatives would benefit from being assessed not only on quantitative performance reflected by their several activities but also by qualitative variables including their relation to the field and with stakeholders.
- Taking into account within the assessment of projects other more qualitative dimensions beyond the set indicators (building new networks and learning capacities, contributing to food security and the populations' wellbeing, etc.).
- Promoting projects involving women and youth as full stakeholders beyond the logic of numbers and indicators. Youth and women are still feeling excluded from State support and subsidies, as long as they do not have the productive resources (land, capital, etc.) to access the market. Reducing them to numbers and indicators does not allow for a proper assessment of the performance and functioning of professional organizations and projects managed by these social categories.
- Consolidating technical assistance from upstream to downstream in order to strengthen structures in charge of developing and monitoring programmes and planning a close-hand technical support to manage the colossal work this entails.
- Promoting social sciences research projects for a better understanding and analysis of the complexity of the agricultural and rural world in Morocco. Results of these studies could benefit from a better articulation with public policies.
- Simplifying administrative procedures and supporting Moroccan universities and researchers (e.g. trainings.) for a better understanding and a broader access to European projects.

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ANNEX 2: QUESTIONNAIRE

FIRST ROUND OF INTERVIEWS

CONTEXT

1. How long have you been working in the agriculture/agro-food/agro-industrial/water sector?
2. If you work within an institution, can you tell us more about the work of this institution in this sector (i.e. its objectives and activities)?
3. How would you describe the current situation of the sector?
4. How has this sector changed since you first started working in it?
 - a. Can you tell us which year was the best year for this sector? (Why? What was different? Did you expand your work because of the positive change that this year brought?)
 - b. Can you tell us which year was the worst year for this sector? (Why? What changed? What did you do to solve the problems faced?)
5. What are your expectations for the coming years for the agriculture and water sectors?
6. Who are the main stakeholders in the field of agriculture and water in Morocco? (e.g. trade unions, associations of growers and producers, cooperatives of farmers, NGOs targeted in EU-funded projects and so on).

CHALLENGES

7. What do you think are the major problems in relation to the agriculture/water sector in Morocco?
 - a. What are the factors that can explain such problems?
8. What are your institution's objectives, guiding socio-economic models, and views regarding local agricultural needs and problems?
9. How do you or your institution define food security and food sovereignty?
 - a. How do these issues (referred to above) interact in the field of rural development and agriculture on the domestic, regional, and international levels?
10. On what institutional/policy change has your institution been working on in the past years?
 - a. What institutional reforms and policies do you think need to be made for improving the sectors?
 - b. What national policies are needed for the improvement of the sectors?
11. Has your institution proposed or implemented policies/strategies/projects to address problems in the sectors?
 - a. If so, how have the policies/strategies/projects benefitted the sectors and the stakeholders in these sectors?
 - b. If your institution has not proposed such strategies, or if you feel that there is still work that needs to be done, what policies or strategies should be done to address these problems?
12. Has your institution collaborated with other institutions/ local or international donors to propose and implement projects in support of the sectors?

POLICIES IN THE AGRICULTURE AND WATER SECTORS IN MOROCCO

13. How do you assess European policies in the Mediterranean and in Morocco in the field of agricultural trade liberalization and cooperation and water with regard to (1) the major problems and needs in the agriculture and water sectors, (2) the issues the EU has focused on, (3) the

- actors involved (i.e. who was included and who was excluded), and (4) the methods used?
- a. Among the stakeholders in these fields, who has benefitted and who has been negatively affected?
 - b. Which actors, methods, and issues would you consider most relevant, necessary, and appropriate?
 - c. What do you think is the impact of these policies from the perspective of people's welfare and local economies' needs (e.g., job creation, labour rights, small farmers versus big farmers, marginalized regions versus wealthy regions)?
14. How do you assess the potential of EU policies in light of the policies which other important regional and external powers are driving in terms of rural and agricultural development in their country (including the US, Turkey, Saudi Arabia, Iran, China, and Russia as well as international institutions such as the World Bank, the Gulf development funds, and so on)?
- a. Are their policies conflicting, competing, or converging with the EU's? What should be the EU's policies in this respect?
15. Have EU-funded development projects been allocated equitably across regions and actors (i.e. the most deprived region receiving the largest funds? the needy and small farmers being targeted)?
- a. Were these projects associated with generating good quality jobs?

SECOND ROUND OF INTERVIEWS

1. What is your general image of the EU?
2. How important is EU market access for you? What should be improved?
3. Do you have any knowledge of/ opinion on specific EU projects and programmes (e.g. ENPARD for rural development)?
4. Do you perceive EU agricultural producers as competitors in certain markets (e.g. the Gulf)? What is your opinion about the EU farm lobby?
5. How do you rate EU programmes and projects in comparison to those of other institutions (e.g. USAID, World Bank)?
6. Is there gender mainstreaming in the EU programmes with corresponding accountability procedures?
7. How have these projects impacted women? Have they been among the beneficiaries and has their power and discretion to make decisions improved?
8. Have EU policies and projects prompted local partners to push toward more gender equality?

MED RESET

مِطَا رِيَسِت



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