



Project no. **SSPE-CT-2004-502457**

Project acronym : : **EU-MED AGPOL**

Project full name :

**Impacts of agricultural trade liberalization
between the EU and Mediterranean countries**

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Priority name : 8.1 Policy-oriented research

Start date of project: 01 March 2004

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PERIODIC ACTIVITY REPORT

2nd period

from 1st March 2005 to 28 February 2006

Project coordinator organisation name : CIHEAM-IAMM

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PERIODIC ACTIVITY REPORT

2nd period from 1st March 2005 to 28 February 2006

Publishable Executive Summary

Publishable Executive Summary

The overall objective of this project is to estimate and describe the impacts of EU and Mediterranean partner agricultural trade liberalization on European countries and societies. This report covers the activities of year two of the project, which is 1 March 2005 through 28 February 2006.

The state of the art is that we are using quantitative analysis tools for part of our analysis but must use other approaches to complement the modeling approach. For processed goods, we use the global supply chain approach to capture the supply chain interactions. We have chosen to use expert panels for the Mediterranean countries with substantial export potential. In this way, we will capture the very best understanding available on what the likely changes will be under different liberalization scenarios. We can then use that information to do the quantitative estimates of impacts on European producing regions.

The specific objectives of this research are as follows:

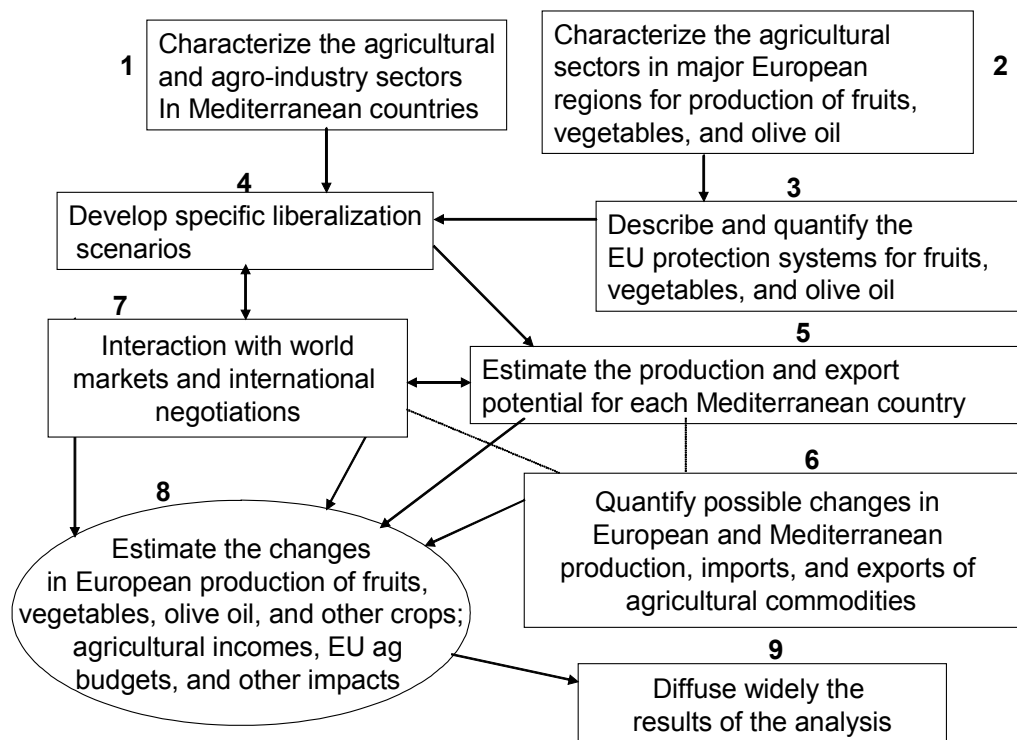
- To characterize the agricultural production, processing, distribution, and retail systems in the Mediterranean countries (WP 1).
- To characterize the agricultural production sub-sectors in major European regions for production of fruits, vegetables, and olive oil (WP 2).
- To describe and quantify the EU protection systems for fruits, vegetables, and olive oil as well as Mediterranean systems for cereals, meats, and milk products (WP 3)
- To develop three realistic liberalization scenarios ranging from small changes to totally free trade (WP 4).
- To estimate the production and export potential for Mediterranean agricultural systems within three years and ten years using expert panels (WP 5).
- Using quantitative tools available, to develop estimates of possible changes in European and Mediterranean production, imports, and exports of agricultural commodities (WP 6).
- To determine the kinds and importance of interactions with other world markets and international trade negotiations (WP 7).
- To estimate the changes in European production of fruits, vegetables, olive oil, and other crops, agricultural incomes, EU budgets, social impacts, and other changes (WP 8).
- To diffuse the results of the research as widely as possible and throughout the duration of the project (WP 9).

The relationships and linkages these objectives and activities are illustrated in Figure 1. During this reporting period, we had significant activity in work packages 1-7 and 9. Details of the accomplishments for each of these work packages are contained in section 2 of this report. Table 2 in section 2 contains a summary of the deliverables completed for each of these work packages.

CIHEAM/IAMM is the lead institution on this project. The project scientific coordinator is Dr. Florence Jacquet of IAMM (phone 33-(0)4-67-04-60-18 and email jacquet@iamm.fr). There are eight other partners listed on the project Web site and in the main report.

In its second year, the project has achieved the objectives originally planned plus some additional activities. In this section we provide a brief overview of the accomplishments by work package and a mention of any problems encountered. Details on each work package are contained in section 2.

Figure 1: Project Overview



Work package 1

Work package 1 is the characterization of agricultural production, processing, distribution, and retail systems in the Mediterranean countries. It is led by IAMM with participation of ENSA/INRA, METU, IAV, IO, and UC. Most of the work on this package was completed in year one. However, the Israel report (D6) and the synthesis report (D7) covering all five countries were due and delivered this year.

Work package 2

Work package 2 is characterizing the agricultural production sub-sectors in major European regions for production of fruits, vegetables, and olive oil. It is led by ENSA/INRA Montpellier with participation of IAMM and CSIC. We have divided this work package into fruits and vegetables as one piece and olive oil as the second. ENSA has taken the lead on fruits and vegetables and CSIC on olive oil.

The fruits and vegetables deliverable (D8/D9) was completed in March 2005 and is available on the project Web site. This component developed an innovative approach of calculating vulnerability indices for different production regions of Europe. These vulnerability indices will be quite useful ultimately in estimating the impacts on the EU of trade liberalization with Mediterranean countries.

A report (D11) on European Production and Consumption of Processed Fruits and Vegetables was also due and delivered in this reporting year.

The olive oil report (D10) was delivered in the second reporting year as planned. It is a very comprehensive analysis of world olive oil markets with considerable detail on EU production, consumption, and trade.

Work package 3

WP3 is to describe and quantify the EU protection systems for fruits, vegetables, and olive oil as well as Mediterranean systems for cereals, meats, and milk products. The major tasks being undertaken are as follows:

- Description and quantification of the European protection of fruits, vegetables and olive
- Description and quantification of the Mediterranean protection
- Computation of PSE and AMS for the olive oil

The report (D13) on Description and Quantification of the EU Protection for Imported Fruits, Vegetables, and Olive Oil from Mediterranean Countries was due and delivered this reporting year. In addition, a software product, which permits easy access the complex protection data, was produced and delivered.

Work package 4

Elaboration of specific assumptions for the partial liberalization scenarios for the European market was the major activity in WP4. For this, individual documents describing the details of border protection by the European Union (import windows, threshold prices, quotas, duties) for each product were produced using the MEDITAR software. Subsequently, specific liberalization hypotheses were formulated. The scenarios as well as the list of products being considered were discussed with the Commission.

For multilateral liberalization scenarios, it was decided to postpone final decision until specific parameters need to be incorporated into the modelling exercise in mid 2006.

Work package 5

Many of the partners were involved in the activities associated with work package 5, which is on the estimation of the production and export potential for each Mediterranean country. All of the countries except Morocco used some version of the Delphi method to obtain expert opinion on the potential production and export increase of fruits and vegetables and olive oil under the assumed liberalization scenarios. Morocco used a more traditional interview method with small groups of experts.

Each country partner (Egypt, Israel, Morocco, Tunisia, Turkey) either has produced or will shortly produce a report containing a summary of their work and estimates of the potential production and export increases.

Work Package 6

Work package 6 is to develop estimates of possible changes in European and Mediterranean production, imports, and exports of agricultural commodities using quantitative tools. This task is being led by IAP (Univ. of Bonn) with support from IAMM, INRA Nantes, METU, IAV, IO, and UC. The main result of second year activities was the revised data base and structure of the CAPRI market module as well as the inclusion of MFN and bi-lateral tariffs between EU and the Mediterranean countries. In addition, the model code and data base were revised in order to include the new products and, to break down the former Mediterranean country aggregates to Turkey, Algeria, Morocco, Tunisia, Egypt and Israel.

Work package 7

Work package 7 concerns interactions among world markets and international negotiations. EU-Mediterranean trade negotiation and liberalization is not the only change occurring in world agricultural trade. Multilateral negotiations are on-going in WTO. The United States has been negotiating free trade agreements with countries around the world including some Mediterranean countries. Thus, we must understand the interactions among all these other changes in world markets and agreements and the EU-MED trade liberalization.

The EU obtains fruits, vegetables, and oils from all over the world. We must also consider other EU sources of these products, likely changes in their market environment, export potential, etc. All of these interactions must be taken into account to estimate the impacts on Europe of trade liberalization with Mediterranean countries.

Work package 9

Work package 9 is the diffusion of results of the research as widely as possible and throughout the duration of the project. The project Web site (<http://eumed-agpol.iamm.fr>) contains all the project reports and other project documents. In addition, it contains other publications from project partners and links to other publications related to the project topic.

The main problems encountered in most of the work packages were data problems. All the data we wanted was not available or sometimes was of poor quality. The other problem was some difficulty with implementation of the Delphi method to obtain expert opinion. However, this difficulty was surmounted, and estimates of production and export potential have been or will shortly be produced by each partner.

PERIODIC ACTIVITY REPORT

2nd period from 1st March 2005 to 28 February 2006

Section 1 :

Project Objectives and Major Achievements

Section 1 : Project Objectives and Major Achievements

The overall objective of this project is to estimate and describe the impacts of EU and Mediterranean partner agricultural trade liberalization on European countries and societies. This report covers the activities of year two of the project, which is 1 March 2005 through 28 February 2006. The major changes in European imports are expected to be in fruits and vegetables and olive oil. Europe has the potential to increase exports to Mediterranean countries of cereals, meats, and milk products.¹ Estimation of changes in exports from the EU to Mediterranean countries can be handled by traditional sector models, and we have chosen CAPRI, a widely used European agricultural sector model for that purpose.

But estimating the impacts of changes in fruit, vegetable, and olive oil imports is an entirely different story. Fruits and vegetables are much more complicated. Many fruits are perennials, and, thus, are difficult to handle in standard annual models. The traditional European export commodities like wheat, barley, milk, meat, etc. are relatively homogeneous. But fruits and vegetables come in hundreds of varieties. Furthermore, there are issues of seasonality that, in essence, make a strawberry in one month different from a strawberry in another month. And on top of all the natural variety, the customs rules and duties applied by the EU for fruits and vegetables are very complicated. In addition, the possible changes in trade in fruits and vegetables are quite large. Thus, it would be very difficult, if not impossible, for any modeling approach to reliably estimate the impacts of prospective policy changes regarding fruits and vegetables. Quantitative models are best when the products are relatively homogeneous, when the policy instruments are straight-forward, and when the envisioned changes are not large. None of those conditions exist for fruits and vegetables, so it would not be wise to use such techniques for this impact estimation.

For olive oil, the case is somewhere between these two extremes. Previously, CAPRI contained other table oils, but not olive oil. In the activity under work package 6, we have now modified CAPRI to include olive oil. Thus, CAPRI will be quite useful in the quantitative analysis with respect to policy changes in olive oil. However, we will still use an expert panel in Tunisia to supplement the quantitative analysis.

The state of the art is that we can and will use quantitative analysis tools for part of our analysis but must use other approaches to complement the modeling approach. For processed goods, we will use the global supply chain approach to capture the supply chain interactions. We have chosen to use expert panels for the Mediterranean countries with substantial export potential. In this way, we will capture the very best understanding available on what the likely changes will be under different liberalization scenarios. We can then use that information to do the quantitative estimates of impacts on European producing regions. We have developed an innovative approach of using vulnerability indices for different producing regions in Europe (See the discussion under WP2 in Section 2).

The specific objectives of this research are as follows:

- To characterize the agricultural production, processing, distribution, and retail systems in the Mediterranean countries (WP 1).
- To characterize the agricultural production sub-sectors in major European regions for production of fruits, vegetables, and olive oil (WP 2).

¹ We use here the term Mediterranean countries to refer to the eastern and southern Mediterranean countries listed in the detailed task description (Malta, Turkey, Morocco, Algeria, Tunisia, Egypt, Cyprus, Lebanon, Libya, Syria, Israel, Gaza and West Bank, and Jordan). We will also use the abbreviation MED to refer to those same countries.

- To describe and quantify the EU protection systems for fruits, vegetables, and olive oil as well as Mediterranean systems for cereals, meats, and milk products (WP 3)
- To develop three realistic liberalization scenarios ranging from small changes to totally free trade (WP 4).
- To estimate the production and export potential for Mediterranean agricultural systems within three years and ten years using expert panels (WP 5).
- Using quantitative tools available, to develop estimates of possible changes in European and Mediterranean production, imports, and exports of agricultural commodities (WP 6).
- To determine the kinds and importance of interactions with other world markets and international trade negotiations (WP 7).
- To estimate the changes in European production of fruits, vegetables, olive oil, and other crops, agricultural incomes, EU budgets, social impacts, and other changes (WP 8).
- To diffuse the results of the research as widely as possible and throughout the duration of the project (WP 9).

The relationships and linkages these objectives and activities are illustrated in Figure 1. During this reporting period, we had significant activity in work packages 1-7 and 9. Details of the accomplishments for each of these work packages are contained in section 2 of this report. Table 2 in section 2 contains a summary of the deliverables completed for each of these work packages.

CIHEAM/IAMM is the lead institution on this project. There are eight other partners listed in Table 1.

Project achievements and problems encountered

In its second year, the project has achieved the objectives originally planned plus some additional activities. In this section we provide a brief overview of the accomplishments by work package and a mention of any problems encountered. Details on each work package are contained in section 2.

Figure 1: Project Overview

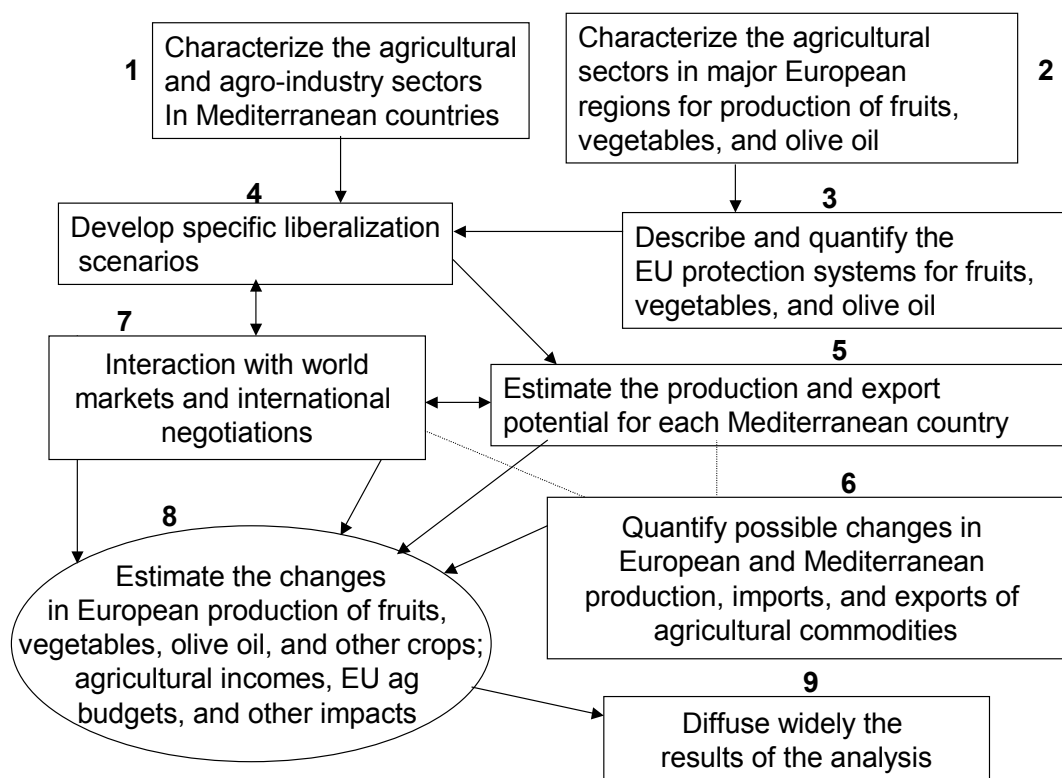


Table 1: EUMED-AGPOL Institutional Participants

Partic. Role*	Partic . no.	Participant name	Participant short name	Country
CO	1	CIHEAM/IAMM	IAMM	France
CR	2	ENSA Montpellier	ENSAM	France
CR	3	INRA Nantes	INRA	France
CR	4	IAP Bonn	IAP	Germany
CR	5	CSIC Madrid	CSIC	Spain
CR	6	METU Ankara	METU	Turkey
CR	7	IAV Hassan II - Rabat	IAV	Morocco
CR	8	Institut de l'Olivier Sfax	IO	Tunisia
CR	9	CAES, Cairo University	UC	Egypt

*CO = Coordinator
CR = Contractor

Work package 1

Work package 1 is the characterization of agricultural production, processing, distribution, and retail systems in the Mediterranean countries. It is led by IAMM with participation of ENSA/INRA, METU, IAV, IO, and UC. The planned and actual deliverables during the first year were reports on Morocco (D2), Turkey (D3), Tunisia (D4), and Egypt (D5) (see Table 2, section2). These reports are publicly available on the project Web site (<http://eumed-agpol.iamm.fr>). All the reports are quite comprehensive with emphasis on the products important for the country and for its trade with the EU.

The other country on which we report is Israel, and that report was done during this reporting year. There was some delay finalizing the sub-contract with our Israeli partner, so that report was delayed a bit, but the delay did not cause problems with other work packages in the project.

We also produced a Synthesis report (D7) covering the most important points from the five country reports (Egypt, Israel, Morocco, Tunisia, and Turkey).

The only other problems encountered were data problems. All the data we wanted was not available or sometimes was of poor quality. This problem exists for most any project of this sort, and the teams in each country have done good work getting the best possible data and doing solid analysis with that data.

Work package 2

Work package 2 is characterizing the agricultural production sub-sectors in major European regions for production of fruits, vegetables, and olive oil. It is led by ENSA/INRA Montpellier with participation of IAMM and CSIC. We have divided this work package into fruits and vegetables as one piece and olive oil as the second. ENSA has taken the lead on fruits and vegetables and CSIC on olive oil.

The fruits and vegetables deliverable (D8/D9) was completed in March 2005 and is available on the project Web site. This component developed an innovative approach of calculating vulnerability indices for different production regions of Europe. These vulnerability indices will be quite useful ultimately in estimating the impacts on the EU of trade liberalization with Mediterranean countries.

The olive oil report was delivered in the second reporting year as planned. It is a very comprehensive analysis of world olive oil markets with considerable detail on EU production, consumption, and trade. This report will provide a sound basis for the analysis to follow.

The only problems encountered in this work package are the typical data problems mentioned above.

Work package 3

Work package 3 is to describe and quantify the EU protection systems for fruits, vegetables, and olive oil as well as Mediterranean systems for cereals, meats, and milk products. The major tasks being undertaken are as follows:

The major tasks to accomplish these objectives are as follows:

- *Description and quantification of the European protection of fruits, vegetables and olive oil* - To undertake this analysis, we use the TARIC data base (*Integrated Tariff of the European Community* -Directorate General for Taxation-EU) which contains the tariff and non-tariff measures and the rules for their application. From this database, the objective is to calculate ad valorem equivalent of the EU protection applied to Mediterranean countries, by

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Activity report

taking into account seasonal variations, the level of entry price, and the level of the tariffs quotas.

The main part of the work during this period was to compute the ad-valorem equivalents of the EU protection. This was done at the most disaggregated level, i.e at the 10-digit level (of the Combined nomenclature) per month. Data on quotas have been gathered. Thus, results give the tariff applied by product, month and country of origin. They give also, for each country, the other potential tariff which could be applied (out quota rate, GSP or MFN).

Moreover, a software product (MEDITAR) has been produced. It translates duties in ad-valorem equivalents and allows aggregations. The queries may be done at the product, the country, and the period level. This software has been given to each partner of the EUMED AGPOL project, so that they have a comprehensive view of EU protection for the products they analyze.

- *Description and quantification of Mediterranean protection* - The computation of the ad valorem equivalents had been made from the GTAP database (Mac Maps) in the first period of the project. They have been introduced directly in the CAPRI model.
- *Computation of PSE and AMS for the olive oil sector* - The main part of the work during this period was to compute the Producer Support Equivalent (PSE) and the Aggregate Measure of Support (AMS) indicators of domestic support provided by the EU for olive oil. Results are given in the report.

Again, the only problems encountered have been typical data problems.

Work Package 4

Work package 4 concerned development of specific liberalization scenarios to be used in the analysis. The lead contractor was CIHEAM/IAMM. Work for this package mobilized more person/months than anticipated because we felt that it was important to enter into a thorough dialogue with Commission officials (particularly DG AGRI) in charge of bilateral negotiations and with those in charge of the fruit and vegetables sector.

Elaboration of specific assumptions for the partial liberalization scenarios for the European market was the major activity. For this, individual documents describing the details of border protection by the European Union (import windows, threshold prices, quotas, duties) for each product were produced using the MEDITAR software. Subsequently, specific liberalization hypotheses were formulated.

The scenarios as well as the list of products being considered were discussed with the Commission.

For multilateral liberalization scenarios, it was decided to postpone final decision until specific parameters need to be incorporated into the modelling exercise in mid 2006. This will permit to wait until more will be known on the outcome of the Doha Round. Furthermore, it was decided in the February 2006 meeting in Brussels to coordinate with Medfrol and to take advantage of the work done in TRADE AG, another project supported by the Commission.

Work package 5

Many of the partners were involved in the activities associated with work package 5, which is on the estimation of the production and export potential for each Mediterranean country. In terms of person effort, it was the largest work package for this reporting period. The overall methodological

documents were developed by CIHEAM/IAMM with assistance from Samir Mili and input from others. IAMM also developed the product list for each country in conjunction with the country partner.

All of the countries except Morocco used some version of the Delphi method to obtain expert opinion on the potential production and export increase of fruits and vegetables and olive oil under the assumed liberalization scenarios. Morocco used a more traditional interview method with small groups of experts.

Each country partner (Egypt, Israel, Morocco, Tunisia, Turkey) either has produced or will shortly produce a report containing a summary of their work and estimates of the potential production and export increases.

The main problems encountered in this work package were related to the Delphi approach. Most of the expert responders were not accustomed to the approach, and they had some difficulty with some parts of it. Also, it was difficult to get them to respond quickly, so that the process could proceed to the second round. Nonetheless, estimates of productions and EU export potential will be available for each partner country.

Work Package 6

Work package 6 is to develop estimates of possible changes in European and Mediterranean production, imports, and exports of agricultural commodities using quantitative tools. This task is being led by IAP (Univ. of Bonn) with support from IAMM, INRA Nantes, METU, IAV, IO, and UC.

After discussion with the partners during the annual meeting in Istanbul, it was decided to at least separate Turkey from the rest of the Mediterranean countries, both due its status as a accession country and its important in EU-Med agricultural trade. Additionally, Morocco was separated from the rest and is now represented as a individual country. This allowed for the implementation of the preferential trade agreement between the EU and Morocco based on information from the EU legislation.

The main result is the revised data base and structure of the CAPRI market module as well as the inclusion of MFN and bi-lateral tariffs between EU and the Mediterranean countries. In addition, the model code and data base were revised in order to include the new products, and, to break down the former Mediterranean country aggregates to Turkey, Algeria, Morocco, Tunisia, Egypt and Israel.

No problems were encountered in accomplishing this work.

Work package 7

Work package 7 concerns interactions among world markets and international negotiations. EU-Mediterranean trade negotiation and liberalization is not the only change occurring in world agricultural trade. Multilateral negotiations are on-going in WTO. The United States has been negotiating free trade agreements with countries around the world including some Mediterranean countries. Thus, we must understand the interactions among all these other changes in world markets and agreements and the EU-MED trade liberalization.

The EU obtains fruits, vegetables, and oils from all over the world. We must also consider other EU sources of these products, likely changes in their market environment, export potential, etc. All of these interactions must be taken into account to estimate the impacts on Europe of trade liberalization with Mediterranean countries.

We are approaching this analysis using information outside of this project and the results of the expert panels described above in task 5; we also intend to use the models described under task 6. Drawing information from both these sources, we will produce “most likely” impacts for each of the scenarios identified in WP4.

Work package 9

Work package 9 is the diffusion of results of the research as widely as possible and throughout the duration of the project. The project Web site (<http://eumed-agpol.iamm.fr>) contains all the project reports and other project documents. In addition, it contains other publications from project partners and links to other publications related to the project topic. Project partners have produced numerous publications related to project activities. Most of these are on the Web site, and they are also included in the publication list in this report.

There were no significant problems encountered in this work.

PERIODIC ACTIVITY REPORT

2nd period from 1st March 2005 to 28 February 2006

Section 2 :

Workpackage Progress of the Period

Section 2 : Work Package Progress of the Period

This report covers the second year of project operation, which was 1 March 2005 through 28 February 2006. During that period we had a substantial amount of activity related to work packages 2 through 7 plus the dissemination of results activity 9. In addition, some reports from work package 1 were delivered during year two. Table 2 provides an overview of the work packages and progress during this reporting period. Details on the activities, achievements, and problems encountered are covered in the sections below on each work package and project partner.

Work Package 1

The first work package of our project is to characterize the agricultural and agro-industrial sectors in the Mediterranean countries, particularly as relevant to fruits, vegetables, and olive oil. Our original plan was to include the following items in the data base:

- Natural endowment
- Farm structure
- Employment
- Farm capital and investment
- Rural infrastructure
- Transport and marketing systems
- Key characteristics of the food processing, distribution, and retailing systems
- Production and consumption levels and trends
- Yields and intermediate output use
- Price levels

In addition, we have created other useful indicators illustrating the relative importance of fruits, vegetables, and olive oil in the national economy and exports for Mediterranean countries. Some of the indicators that are being developed by product and country are as follows:

- Share of exports to the EU (percentage of total EU imports of the commodity)
- Share of exports to the EU candidate countries
- Share of world market exports
- Production per capita
- Use of production – domestic market, export, and transformation
- Fraction of production that is exported
- Fraction of production that is exported to the EU
- Fraction of production that is exported to EU candidate countries

However, since two projects were funded in this area, a decision was made in year one that data acquisition would be divided between the MEDFROL project and our project. Some of this data is available from MEDFROL (<http://medfrol.maich.gr>) and some from EUMED-AGPOL (<http://eumed-agpol.iamm.fr>). In both cases, the Web sites are updated as new information becomes available.

We also covered the agro-industrial sector. Most of the reports also cover agricultural and agro-industrial policies as well as trade policies.

As indicated in Table 2, the outputs produced during this year were the Israel report (D6) and the Synthesis report (D7) covering the most important points from the five country reports (Egypt, Israel, Morocco, Tunisia, and Turkey).

The main problem encountered that affected reporting during this period was a contracting delay on the Israel work. However, even with the contracting delay, the Israel report delay will not cause subsequent problems for other project activities.

Work Package 2

Work package 2 does essentially the same analysis for major European regions for fruits, vegetables, and olive oil, as work package 1 did for the Mediterranean countries. Here again, we rely mainly on data sources from public and international organizations, producer associations, and private sources. The olive oil portion of the analysis is led by the Spanish Council for Scientific Research in Madrid (CSIC), and the fruits and vegetables component will be led in INRA-Montpellier. By making the early assessments widely available, we hope to obtain as much public input as possible and to stimulate others to use the information and data collected.

In WP2, we use the global supply chain approach for selected chains in order to take into account not only the global aggregates, but also the role and dynamics of institutions and economic agents involved in the whole food chain (producers, manufacturers, distributors, exporters/importers, consumers). We collected data on major food industries such as value added in the sector, number of enterprises, number of employees, profitability, foreign capital, etc., to develop a good understanding of the sub-sector. Changing networks of food supply is a prominent issue in the current context of increasing globalization of the food system. In this sense, it is helpful to investigate new horticultural and olive oil marketing networks linking MED producers with EU consumers. In other words, the supply chains will no doubt involve interactions on both sides of the Mediterranean. For the fruit and vegetable work, we use an innovative approach of defining "vulnerability indices" for particular regions in Europe. The fruit and vegetable and olive oil work in work package 2 is described below.

Fruits and vegetables

The WP2 fruit and vegetable work was led by ENSA/INRA Montpellier with participation by CIHEAM/IAMM. The main activity for CIHEAM/IAMM during this time period was the elaboration of statistical data on international trade in processed fruits and vegetables using the COMTRADE data base. ENSA/INRA Montpellier was the lead partner on this activity.

The European Union is the largest importer in the world of fruits and vegetables, with the Mediterranean countries as very important trading partners. The EU is also an important producer of fruits and vegetables (110 million tons on average between 2001 and 2003). By taking into account the progressive liberalization of imports between Europe and the Mediterranean Basin, these production regions are at risk of being impacted by the production of fruits and vegetables in Southern Mediterranean countries, which benefit from important competitive advantages (lower

labor costs, an enlarged product availability as a result of producing for longer periods). Some issues that were investigated include:

- What products would be impacted with the emerging of this new competition?
- Which regions would be greatly affected by the new competition?
- What would be the outcomes resulting from the new competition?

After determining the potential constraints faced by the European regions specializing in the production of fruits and vegetables, we determine their vulnerability levels.

The methodology we use is focused on the actors strategy. The starting point uses the French *filière* approach (“commodity chain”), which includes the study of the competitive dynamics of strategic groups involved in all stages of the commodity chain, i.e. agricultural producers and downward-related enterprises and their linkages with the macro and regional economy. We analysed successively the international positioning of the EU on the fruit and vegetable market and, then, its production potential, consumption dynamics and EEC institutional framework (CMO). We tried first to characterize one of the most important and common commodity systems for the five Mediterranean countries of the EU (Spain, France, Greece, Italy and Portugal), the fresh fruit and vegetable commodity system and, secondly, to measure the “vulnerability” of the concerned regions of these countries faced with an increasing competition coming from SEMC². This assessment leads to build an inter-regional diagnostic comparison measured by a Regional Vulnerability Index (RVI), outlining the strengths and weaknesses of fruit and vegetable specialized European regions. The theoretical basement of this research could be found mainly in the resource theory, abilities and *capabilities* based upon the management and organization sciences.

These different approaches permit estimating the RVI for 3 sub-sectors : fresh fruit, fresh vegetables and processed fruits and vegetables. This index varies between 0.07 (Valencia) and 1.60 (Anatolie-Macedoine-Thrace) for fresh fruits, that is to say a large benchmark from 1 to 23 (average 0.4) and between 0.06 (Puglia) to 0.66 (Alentejo-Algarve) for fresh vegetables, that is to say a smaller dispersion from 1 to 11 (average 0.33). These scores outline the big diversities of European regions on the development level. Finally, we crossed the RVI index with a regional specialization index in order to build a classification of regions (at the beginning of the years 2000).

For processed fruits and vegetables, the RVI of 52 regions varies from 2.86 (Western Macedonia, the most vulnerable region) to -1.19 (Eastern Macedonia, the less vulnerable region), i.e. a gap of 4.05 around an average of 0.3 and a median 0.23, which finally makes the method more credible, given the convergence phenomena observed in the long run between the 15 countries of the EU. Twelve relatively specialised regions appear to be very vulnerable (Sicily, Basilicate, Abruzzes, Puglia in Italy ; Epire, Western Macedonia, Thessalie, Crete in Greece ; Aragon, Galice, Madrid in Spain ; Entre Douro, Ribatejo, Beira litoral in Portugal). On the contrary, Rhône-Alpes, Languedoc-Roussillon, Aquitaine, Provence-Alpes-Côte d’Azur in France ; Piémont, Vénétie, Lombardie in Italy and Navarre in Spain appear as important regions owing to their activity and, at the same time, less exposed to the competition. Emilie-Romagna, first region for its sales, seems relatively threatened due to the poor economical performance of the sector firms.

In addition to completion of the deliverable D8/D9 reports, “Characterization of European Fruit and Vegetable Production and Markets,” this work was presented at an international conference in Montreal, Canada in June 2005.

The only major difficulties encountered in this work were the data problems described previously.

2 Southern and Eastern Mediterranean Countries (SEMC).

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Activity report

Olive oil

The olive oil part of this work package is led by the CSIC team-Madrid, which in consequence is responsible for the EU olive oil report. That report (D10), entitled "Characterization of European Olive Oil Production and Markets", was completed in April 2005 as scheduled.

In order to achieve the objectives stated for EU olive oil sector characterization, the CSIC team first elaborated an analytical scheme illustrating concrete variables, factors and aspects to be analyzed, and methodology to be used in the olive oil report. That scheme has been conceived in agreement with INRA-Montpellier team (responsible for fruits and vegetables reports) in order to preserve certain homogeneity and unity in the analysis of the whole work package 2, albeit obviously considering the sectoral and product particularities in each case.

The methodology used relies basically upon conventional sectoral analysis methods and case studies, using product marketing system approaches in order to take into account not only the global aggregates, but also the role and dynamics of institutions and economic agents involved in the whole marketing chain (producers, manufacturers, distributors, exporters/importers, consumers) and stakeholders in general.

The analytical scheme (see document on the project website) is structured in four parts. Product categories concerned are extra virgin olive oil, virgin olive oil, olive oil (blend of refined and virgin olive oil), and olive-pomace oil. Countries explored are Spain, Italy, Greece, Portugal and France, and the period of analysis is 1990-2004.

This investigation is being accomplished basically with data collected from secondary sources, distinguishing between three categories of sources: 1) public, official (national and international) sources: IOOC, FAO, Eurostat, WTO, official national sources...; 2) private (professional associations, private consulting): Euromonitor, Alimarket, Asoliva, Anierac, Datamonitor, ACNielsen..., and 3) published literature and data bases.

Results have been verified and validated by consultations with experts in the sector from all the major producing regions in Europe. Moreover, useful information has been integrated from the olive oil report for Greece submitted by the MEDFROL project (see plan for collaboration between MEDFROL and EU-MED AGPOL projects).

Work package 3

Work package 3 concerns an analysis of the protection now in place in the EU for fruits, vegetables, and olive oil as well as agricultural commodity protection of EU exports to Mediterranean countries. WP3 is being led by INRA Nantes with assistance from CIHEAM/IAMM. The D13 report on EU protection was delivered in August 2005. The D14 report on Mediterranean country protection will be delivered in April 2006.

Trade liberalization agreements between the EU and Mediterranean countries could result in major changes in European protection of fruits, vegetables, and olive oil. Protection of fruits and vegetables in Europe is unusually complex. In order to analyze the impacts of changes in EU policies for these commodities, we must have a comprehensive picture of the protection now in force between the EU and Mediterranean partners. The EU has a number of preferential agreements with Mediterranean countries, but the agreements may vary by commodity and country. To undertake this analysis, we made use of the TARIC (Directorate General for Taxation-EU) data base. This is a relational data base containing the tariff and non-tariff barriers and the measures and rules for their application. This data base serves as the reference point for European Union member states and is updated constantly as needed. The nomenclature used for tariffication is much more complex than that used for analyzing trade flows. The additional specificity sometimes is related to quality, but may be linked to other characteristics as well such

as seasonality or entry price. These elements are of great importance in understanding EU protection, especially for fruits and vegetables. These considerations lead us to examine the rules actually applied (TARIC), and the conditions of effective use of the rules by importers. This analysis is being done by treating information on Single Administrative Declarations (SAD) from the customs office (Domain Comext – Taric (Eurostat)). In addition to quantifying the effective tariffs in place, we will also summarize important regulations that translate to non-tariff barriers.

In addition to handling the important fruits, vegetables, and olive oil from Mediterranean countries, we will also conduct the same analysis for commodities likely to be important Mediterranean imports from the EU. That is, we will quantify the current protection levels for EU exports of cereals, meats, milk, etc. to the Mediterranean countries.

The major tasks to accomplish these objectives are as follows:

- *Description and quantification of the European protection of fruits, vegetables and olive oil* - To undertake this analysis, we use the TARIC data base (*Integrated Tariff of the European Community* -Directorate General for Taxation-EU) which contains the tariff and non-tariff measures and the rules for their application. From this database, the objective is to calculate ad valorem equivalent of the EU protection applied to Mediterranean countries, by taking into account seasonal variations, the level of entry price, and the level of the tariffs quotas.

The main part of the work during this period was to compute the ad-valorem equivalents of the EU protection. This was done at the most disaggregated level, i.e at the 10-digit level (of the Combined nomenclature) per month. Data on quotas have been gathered. Thus, results give the tariff applied by product, month and country of origin. They give also, for each country, the other potential tariff which could be applied (out quota rate, GSP or MFN).

Moreover, a software product (MEDITAR) has been produced. It translates duties in ad-valorem equivalents and allows aggregations. The queries may be done at the product, the country, and the period level. This software has been given to each partner of the EUMED AGPOL project, so that they have a comprehensive view of EU protection for the products they analyze.

Concerning the non tariff barriers, the task undertaken was a survey of the economic literature about NTBs (meaning, measure of these NTBs and impacts on trade) and gathering the different measures applied at the entrance of the European market. This has been summarized in the last part of the report.

- *Description and quantification of the Mediterranean protection* - The computation of the ad valorem equivalents had been made from the GTAP database (Mac Maps) in the first period of the project. They have been introduced directly in the CAPRI model.
- *Computation of PSE and AMS for the olive oil sector* - The main part of the work during this period was to compute the Producer Support Equivalent (PSE) and the Aggregate Measure of Support (AMS) indicators of domestic support provided by the EU for olive oil. Results are given in the report.

The protection for fruits and vegetable sector is very complex and implies different methodological choices:

- First, in order to have a comprehensive picture of this complexity, one needs to work at a very disaggregated level of the nomenclature. In fact, trade measures regulating the access to the European markets are defined at the 10-digit level of the combined nomenclature.

This is particularly important for this sector, because entry prices with seasonal variations and different specifications of the product qualities are defined at this level.

- Access to the EU markets differs for each Mediterranean country, and the duties (ad valorem and specific duties) applied to the products will differ by the origin of the product. So it is necessary to take into account all the bilateral agreements signed by the EU with its Mediterranean partners. However, these agreements don't cover all the products. In that case, the tariff applied is the MFN tariff, which also must be computed.

The main problems encountered and corrective action taken are as follows:

- Concerning the computation of the ad-valorem equivalents, the main problem is the so-called entry prices problem. What is the real protection applied in such a case? There is no good measure of the protection, and it depends on what we want to do - a comparison between products or a comparison between countries. Concerning the comparison between countries, the aim is to have a good picture of the preferential margin allowed for each partner. Because Morocco has negotiated specific entry prices for some products, ad-valorem equivalent have been computed systematically on the Morocco entry price.
- For the computation of PSE for olive oil, the only problem we have faced is to obtain a "world price" of olive oil. We gathered prices from different sources, but these are rather "distorted" (prices in the EU are not representative of the world price because of the existence of support) or too "general" (not disaggregated by quality). The solution was to work not with prices but with unit value. The Comtrade database has been used, and a proxy of the reference world price was given by the unit value of Turkish oil at the USA border. This choice has been driven by two reasons: 1) Turkey is the third major exporter of olive oil after the EU and Tunisia; 2) USA is the main destination of Turkish olive oil. Tunisia was not adequate because its main destination is the EU market.

In addition to the reports, publications related to this work package are listed in the publications table and on the project web site.

Work package 4

Work package 4 concerned development of specific liberalization scenarios to be used in the analysis. The lead contractor was CIHEAM/IAMM. Work for this package mobilized more person/months than anticipated because we felt that it was important to enter into a thorough dialogue with Commission officials (particularly DG AGRI) in charge of bilateral negotiations and with those in charge of the fruit and vegetables sector. This collaboration led to important decisions regarding definition of product and country specific scenarios necessary for the successful for completion of WP5. The major activities in this undertaking are as follows:

- Organization of the program of a meeting in Brussels on June 6, 2005, with Commission officials, the purpose of which was to present the state of progress of the project and to choose both the total and partial liberalization scenarios to be further investigated.
- Elaboration of specific assumptions for the partial liberalization scenarios for the European market. For this, individual documents describing the details of border protection by the European Union (import windows, threshold prices, quotas, duties) for each product were produced using the MEDITAR software. Subsequently, specific liberalization hypotheses were formulated according to the following principles:
 - When the major instrument is a quota, we checked to see if actual country exports were greater than or less than twice the quota. If actual exports are more than twice

Eu-Med Agpol project, 1st period from 01 March 2005 to 28 February 2006
Activity report

the quota, the partial liberalization assumption for that country and commodity is an expansion of the quota to 1.5 times the current level of exports. If actual exports are less than twice the quota, the liberalization assumption is to double the quota.

- If it appeared that the binding export constraint was the length of the import window, we added one month to each side of the import window for the partial liberalization scenario for that country and product.
- If it appeared that the most important barrier was the minimum import price, we lowered the minimum import price by 25 percent for that product and country.
- If the major export impediment appeared to be a tariff or a tariff in certain periods, we either eliminated the tariff or reduced it by 50 percent, whichever seemed more reasonable for that product and country.

These scenarios as well as the list of products being considered were discussed with the Commission.

For multilateral liberalization scenarios, it was decided to postpone final decision until specific parameters need to be incorporated into the modelling exercise in mid 2006. This will permit to wait until more will be known on the outcome of the Doha Round. Furthermore, it was decided in the February 2006 meeting in Brussels to coordinate with Medfrol and to take advantage of the work done in TRADE AG, another project supported by the Commission.

Work package 5

Many of the partners were involved in the activities associated with work package 5, which is on the estimation of the production and export potential for each Mediterranean country. In terms of person effort, it was the largest work package for this reporting period. Activities undertaken by each partner are listed below.

CIHEAM/IAMM

CIHEAM/IAMM was the lead partner in this work package although each country partner did their own analysis more or less independently. CIHEAM-IAMM's contribution were as follows:

- Selection of the products to be studied for each country: This choice was made on the basis of two criteria: first, the importance of the various products in the international trade of the country, and, secondly, the potential competition with domestic production in the EU. The list of products was then given to country teams together with the detailed description of the European protection system by product and country.
- Coordination of the country reports: formulation of a common outline, of a methodological note on the Delphi method and of model questionnaire.
- Writing of Deliverable D16 – report 2: Moroccan Export Potential for Processed Fruit and vegetables: The purpose of this report is to produce a diagnosis on the constraints and the export potential for processed fruits and vegetables from Morocco on the basis of an expert consultation, mainly institutional experts, from the sector.

Egypt

1. Description of tasks

The activities carried out in the report deal with the elements determined by the project to achieve the objective of WP5; that is, to estimate Egypt's export potential of major fruit and vegetable export commodities under different liberalization scenarios, and explore the major constraints in increasing Egyptian exports of these products to the EU. The most important fruit and vegetable products in Egypt were selected including: potatoes, orange, strawberries, table grapes, green beans, melons, onions, and tomatoes.

2. Methodology

The methodology used relies basically upon expert panels using the Delphi method. In this context the activities carried out during phase 2 of the project include:

- Reviewing the previous work that has dealt with the Delphi method
- Elaborating the questionnaire that has been designed to forecast the export potential, in order to make it match the applied protection for Egypt.
- Two liberalization scenarios, partial and total, that have been developed in task 4, were included in the questionnaire.
- Members of the expert panel were identified combining major exporters of the selected products, academics, and officials involved in the analysis of these products.
- The panel members were provided the questionnaire either through personal contact or e-mail.
- Data provided through questionnaire has been tabulated and analysed so that estimates of export potential could be reached under partial and total liberalization scenarios.
- Writing up the report

3- Problems encountered and corrective action taken

In carrying out the study, the project team encountered several problems. One of these problems was the slow response of the panel experts to return the questionnaire. This has been particularly true in the case of private exporters. The likely main reason behind that is that forecasting of potential exports at the national level for the year 2015 may have required some analytical skills, which might not be available.

4- Main scientific results

Main results of the study include the following:

- 1) the current applied protection constitutes an effective constraint in the face of Egypt's exports, particularly non-traditional products such as strawberry, green beans and table grapes;
- 2) Shifting from the old protocol for Economic cooperation (1977-2003) to EU-Egypt partnership Agreement (enforced 2004) has relaxed some protection constraints (quota, window, tariff and entry price), which has, in turn, made exports almost double in 2004. This change could be viewed as preliminary evidence that Egyptian exports could respond positively to liberalization action.
- 3) Results of expert panel using Delphi approach reveal that Egypt's export potential in 2015 under the partial liberalization scenario is significantly larger than the current exports for each commodity.

Israel

We used the Delphi methodology to evaluate the impacts of two trade liberalization scenarios on agricultural trade between Israel and the EU. The study covers effects on the export of Israeli agricultural products to the EU, but ignores the possibility of import from EU (and other Mediterranean countries) to Israel. The possibility of increased imports into Israeli raised concerns during our discussions and interviews. Another issue that surfaced during the interviews was the choice of the product categories. Most experts were puzzled why flowers – a major export crop – were not part of the survey and why strawberries were included.

Overall, trade liberalization is expected to increase Israeli export of agricultural products to the EU by about 12-60% and decrease prices by 3-15%. In general, production is expected to increase in all product categories. It is possible that the experts had a hard time evaluating the effects of trade liberalization on competition, thus their forecasts are based on partial aspects of liberalization.

Morocco

The Moroccan team decided to use a more traditional expert interview approach to obtain expert opinion on the potential for increased production and exports of fruits and vegetables to the EU. Six products were included in the Moroccan analysis: fresh tomatoes, courgettes, green beans, clementines, melons, strawberries, and industrial tomatoes.

An interview guide was developed and tested with a panel of five experts. Interviews were done in Casablanca, Marrakech, Meknes, and Larache. A draft of the report is already available on the website. The final report is expected to be available shortly.

Tunisia

This Tunisian work was carried out by the Olive Tree Institute. The achieved work consisted in the estimation of olive oil production and export potential in Tunisia within five years and ten years using expert panels.

1. Description of tasks in relation to the general objective of the work package

For Tunisia, WP5 concerns the estimation of olive oil production and export potential within five years and ten years using expert panels under different liberalization scenarios of the EU market. In Tunisia, olive oil is a strategic export product. It plays an important economic, social and environmental role. Tunisia is the fourth producer and exporter in the world after Spain, Italy and Greece. Between 1990 and 2004, it produced 157 thousand tons of olive oil, of which 109 thousand tons was exported. Close to 90% of these exports were destined to the European Union, which constitutes the more important and steadiest traditional client of Tunisia. These exports represented 14% of the total European imports of olive oil and 75% of the European imports coming from third countries. The exports are done mainly in a preferential regime exonerated of custom duties.

The future of the Tunisian olive oil competitiveness on the EU market is tributary of the dynamics of this market (supply, demand and trade issues), the new arrangements concerning market liberalization (MCO reform, WTO negotiations and bilateral and regional trade agreements) and the production and export system in Tunisia.

To estimate the near and medium term production and export potential, we have proceeded in three stages:

1. Analysis of the role of olive oil in the Tunisian economy and its position on principals export markets.
2. Identification of some strengths, weakness, threats and opportunities that govern performances of the olive oil sector through a SWOT analysis.
3. Engagement of an expert investigation using a Delphi method. 23 experts having different functions in the olive oil sector are asked to:
 - Estimate the olive oil production growth potential during the next 5 and 10 years (they are told not to consider market constraints).
 - Complete the list of the main strength, weakness, opportunities and threats that govern olive oil sector performance,
 - Estimate the potential of olive oil export in preferential regime (contingent and TPA) and in normal regime for some liberalization scenarios;
 - Appraise the impact of the modifications brought to the Common Organization of the Markets in olive oil and table olives and to agricultural politics in Tunisia.

2. Methodology

The first method used is SWOT. This method has the advantage to be relatively simple. The second method used is Delphi. This method consists in an iterative process permitting an anonymous presentation of judgment by panel experts, judgments that are submitted to reappraisal. The foundation of this method rests on the hypothesis that the expertise constitutes a source of valuable information.

The expert is chosen for his capacity to consider the future. He has a good convenient practical knowledge, politics, legal or administrative of a precise subject and having a sufficient legitimacy to express a representative opinion of the actor group to which he belongs. The expert panels are composed by 23 individual having different functions in the olive oil sector.

The questionnaire includes 15 investigations relative to:

- Activity domain of the expert (Q1)
- Determination of the main external opportunities and threats and internal strengths and weakness that determine Tunisian olive oil exports to the European Union during the next decade; (Q2 and Q3)
- Evaluation of the olive oil production future increase during the next 5 and 10 years and the actions that will permit this increase if Tunisia wasn't confronted with market constraints. (Q4 and Q5)
- Evaluation of the proportion of this production that will be exported to the European Union during the next 5 and 10 years (horizon 2015) under different liberalization scenarios of the EU market (Q6, 7, 8, 9, 10, 12, 13 and 14)
- Evaluation of the impact of article 11 of the regulation n°855/2004 on the Tunisian exports in the European market during the next decade (Q11)
- Evaluation of the impact of adopting specifications for the private exporters on quantities exported to the European market by the private sector during the next decade (Q15)

3. Problems encountered and corrective action taken

The main difficulty was the unavailability of some experts, which required more time to finish the first round. The exceptional character of the olive growing campaign 2005-2006 was an important factor (increase of the olive price, uncertainty concerning the olive oil foreign market, export price, etc.).

Turkey

The expert panel survey was used for the estimation of the export potential of Turkey. Agriculture sector modelling technique with maximum entropy has been used for the quantification of the impact analysis on Turkish production, imports and exports.

The major problem was related to the reluctance of the exporters in the panel survey. Every possible effort was made to get their response; hence, to have a balanced representation of the exporters in the expert panel survey. This has been resolved by visiting them. However, this delayed the delivery of the report.

The export potential of Turkey is expected to be high especially in fresh fruits and vegetables. However, since the base period quantities are quite low, even high proportional increases are not expected to disturb the EU markets. The preliminary results of the liberalization of trade in agricultural products indicate that Turkey will remain an exporter of fruits and vegetables, but imports are expected to remain high in livestock products.

Work package 6

The team at UBONN is responsible for the modification and application of the CAPRI modeling system, in order to analyze the effect of possible bi-lateral trade agreements between the EU and the Mediterranean countries for major agricultural products, not just fruits and vegetables. During the first reporting period, the main thrust was the modification of the CAPRI market module in order to integrate products relevant for Mediterranean Countries and the expand the country coverage to single Mediterranean Countries.

Data on market balance positions and bi-lateral trade flows are based on data from FAOSTAT, so that the concept of the Supply and Utilization accounts is underlying the CAPRI market model data base as well. Consequently, all processed products are aggregated into primary product equivalent using conversion factors. Accordingly, tariffs should reflect these product trees as well. Data availability at EU and FAO level combined with technical restrictions render it possible to expand the system to single vegetables or fruits, or even capture some seasonality aspects. Given the product list where trade and market data are available on a global scale, potatoes, tomatoes, other vegetables, citrus fruits (as an aggregate), an aggregate of apples, pears & peaches, other fruits, olive oil, table grapes and wine can be included in the CAPRI modeling system on top of the existing product list in the trade component. The expansion of the product list in the model made it necessary to implement the Common Market Organisations (CMOs) for fruits and vegetables, wine and olive oil.

Long-term trends are based on the @2030 report of FAO. The parameter set for the Mediterranean countries is based on elasticities of the WFM, and further assumptions. The original idea was to introduce endogenous bi-lateral trade flows between the EU and single Mediterranean countries in the CAPRI market module, resulting in a framework of 36.000 equations and variables. Test revealed stability problem due to a lot of rather small trade flows plus an unacceptable high solution time. It was there decided to group the Mediterranean countries to a trade block.

After discussion with the partners during the annual meeting in Istanbul, it was decided to at least separate Turkey from the rest of the Mediterranean countries, both due its status as a accession country and its important in EU-Med agricultural trade. Additionally, Morocco was separated from the rest and is now represented as a individual country. This allowed for the implementation of the preferential trade agreement between the EU and Morocco based on information from the EU legislation.

Main scientific results

The main result is the revised data base and structure of the CAPRI market module as well as the inclusion of MFN and bi-lateral tariffs between EU and the Mediterranean countries. In addition, the model code and data base were revised in order to include the new products, and, to break down the former Mediterranean country aggregates to Turkey, Algeria, Morocco, Tunisia, Egypt and Israel. Elasticities for these countries and products were sampled, and integrated in the modeling system, and the parameters of the flexible functional forms were calibrated to the prices and quantities to meet microeconomic definitions. A first set of external projections was sampled to construct the intermediate reference run. Papers are listed in the publications table.

No problems were encountered in accomplishing this work.

Work package 7

Work package 7 concerns interactions among world markets and international negotiations. EU-Mediterranean trade negotiation and liberalization is not the only change occurring in world agricultural trade. Multilateral negotiations are on-going in WTO. The United States has been negotiating free trade agreements with countries around the world including some Mediterranean countries. Thus, we must understand the interactions among all these other changes in world markets and agreements and the EU-MED trade liberalization.

For example, Morocco exported significant quantities of fruit to new Eastern EU member countries. Since they became members of the EU, Morocco no longer has the same access to these markets. On the other hand, Morocco having negotiated a FTA with the U.S., might be able to export some of its potential exports to the EU to the U.S. Similarly, Morocco might end up importing American wheat and meat instead of or in addition to EU products.

On the other hand, the EU obtains fruits, vegetables, and oils from all over the world. We must also consider other EU sources of these products, likely changes in their market environment, export potential, etc. All of these interactions must be taken into account to estimate the impacts on Europe of trade liberalization with Mediterranean countries.

We are approaching this analysis using information outside of this project and the results of the expert panels described above in task 5; we also intend to use the models described under task 6. Drawing information from both these sources, we will produce "most likely" impacts for each of the scenarios identified in WP4.

Within this framework, the CSIC team carried out research on the olive sector that led to a series of publications (see the publications list). Two basic purposes have been addressed in these publications:

- 1) To explore the new economic context in which international olive oil marketing strategies are framed, under the premises that a) the growing liberalization of international trade is inducing an emergent globalization process in product trading, and b) that business strategies are increasingly influenced by a more demand-driven food chain. This analysis first discusses the macro-factors conditioning olive oil trade on a worldwide scale, surveying the main changes in market regulation schemes (CAP reform, WTO negotiations) as well as in recent world product supply and demand trends. Second, it addresses a series of microeconomic and organizational factors shaping business strategies with respect to product marketing, placing special emphasis on quality as a key factor for expansion into potential markets.

- 2) To analyze current and expected trends for olive oil marketing in non-traditional markets, researching, first, the rationales behind the need to foster olive oil international expansion outside

producing markets and, second, the modes of market access and marketing strategies to gain new markets and to achieve sustained competitive advantages. The whole purpose was to provide an assessment of impacts of those trends from the perspective of the product's marketing on non-traditional markets. Special emphasis has been placed on the challenges the olive oil sector will have to face to augment its market share and competitiveness in these markets. The underlying hypothesis were a) the relatively low presence of olive oil in non-traditional markets is primarily the result of a lack of knowledge about the product, and b) this lack of Knowledge is directly derived from the weak international product marketing.

This task will produce one report that will contain a description of the interactions anticipated with other world markets plus a description of the linkages among the EU-MED trade liberalization and WTO negotiations and other bi-lateral or multi-lateral negotiations or agreements. That report will stand on its own plus serve as input into task 8.

Work package 9

The objective of work package 9 is to diffuse the results of the project as widely as possible.

The project Web site (<http://eumed-agpol.iamm.fr>) contains all the project reports and other project documents. In addition, it contains other publications from project partners and links to other publications related to the project topic. Project partners have produced numerous publications related to project activities. Most of these are on the Web site, and they are also included in the publication list in this report.

Regarding diffusion in the scientific community, the main activity during the period was the organisation of a workshop that will be held in Chania on June 2006 during the EAAE seminar "Marketing Dynamics within the Global Trading System : New perspectives". This workshop jointly organized with MEDFROL, will allow to diffuse broadly the results of the two project. Furthermore besides the dissemination in the scientific community, we also made several presentations of the project to decision-makers.

There were no significant problems encountered in this work.

Table 2 - Work Package Progress During Year Two

Work Package	Leader	Participants	Deliverables and Due Date	Date Delivered
1. Characterize the agricultural and agro-industry sectors in Mediterranean countries	CIHEAM/ IAMM	METU, IAV HASSAN II, UNI.CAIRO, IO, CIHEAM- IAMM	D6 Characterization of the Israeli Agricultural Sector with Special Emphasis on Fruits, Vegetables and Processed foods (5/05) D7 Characterization of agricultural and agro-industrial sectors in Mediterranean countries - An overview of agricultural and agro-industrial sectors in Egypt, Israel, Morocco, Tunisia, and Turkey (5/05)	9/2005 7/2005
2. Characterize the agricultural sectors in major European regions for production of fruits, vegetables, and olive oil	ENSA-Montpellier	CIHEAM/ IAMM, ENSA Montpellier, CSIC Madrid	D8/9 Characterization of European Fruits and Vegetables Production and Markets (3/05) D10 Characterization of European Olive Oil Production and Markets (4/05) D11 Characterization of European Production and Consumption of Processed Fruits and Vegetables (5/05) D12 Characterization of European Production and Consumption of Fruits and Vegetables and Processed Fruits and Vegetables(6/05)	4/2005 4/2005 11/2005 4/2006 (forthcoming)
3. Describe and quantify the EU protection systems for fruits, vegetables, and olive oil	INRA Nantes	CIHEAM- IAMM	D13 Description and Quantification of the EU Protection for Imported Fruits, Vegetables, Olive oil from Mediterranean countries (5/05) D14 Description and Quantification of Mediterranean Country Protection of Imported Agricultural Commodities Important to the EU(5/05)	8/2005 4/2006
4. Develop Specific liberalization scenarios	CIHEAM-IAMM	CIHEAM- IAMM, INRA Nantes; IAP Bonn	D15 Alternative Liberalization Scenarios for EU (8/05)	2/2006

Work Package	Leader	Participants	Deliverables and Due Date	Date Delivered
5. Estimate the Production and Export Potential for each Mediterranean country	CIHEAM-IAMM	CIHEAM-IAMM; IO; METU; IAV HASSAN II, UNIV. Cairo,	D 16 Moroccan Production and Export potential for fruits and vegetables - An expert Panel Analysis (9/2005) D 17 Turkish Production and Export potential.... (10/05) D 18 Tunisian Production and Export Potential for olive oil....(1/05) D 19 Egyptian Production and Export Potential...(1/06) D 20 Israeli Production and Export Potential.....(3/06)	2/2006 2/2006 4/2006 (forthcoming) 1/2006 3/2006
6. Quantify possible changes in European and Mediterranean production, imports, and exports of important commodities	IAP, University of Bonn	CIHEAM-IAMM, INRA Nantes; IAP University of Bonn	D 24In progress	
7. Interaction with world markets and international negotiations	CIHEAM-IAMM	CIHEAM-IAMM, ENSA Montpellier, IAP University of Bonn, CSIC Madrid	D 25In progress	

PERIODIC ACTIVITY REPORT

2nd period from 1st March 2005 to 28 February 2006

Section 3 : *Consortium Management*

Section 3 : Consortium management

1) Consortium management tasks and their achievement

- General coordination and administrative issues

Globally, there were no significant problems encountered for the management tasks. Periodic reports for the first period have been approved by the Commission and the Consortium received the second payment in due time (August 2005).

The CIHEAM-IAMM (coordinator) maintained a close relation with the project partners. CIHEAM-IAMM developed a strong effort of communication and assistance regarding the FP 6 financial rules applying to the project. For a better understanding of management rules, it was necessary to give some detailed explanations. Another part of our management work was to coordinate the process of collecting activity and management reports from each contractor.

Regarding the distribution of the Community's funds, the Consortium decided to allocate the second payment proportionally of the work of each contractor in the second period. The remains of the funds will be allocated in April 2006.

- The METU-ISRAEL subcontract was completed.

- Specific coordination among partners

- An important tool of communication among partners is the project Web site (<http://eumed-aggpol.iamm.fr>). It contains a private access, that provides information regarding deliverables, meetings reports, as well as administrative and financial issues.

The main part of the coordination work was :

1) Organization of the annual meeting project held in Istanbul – May 2005

2) Small groups e-meetings and conference calls :

- WP 2 : discussions on the WP2 synthesis report Partner1/Partner 2
- WP 3 : consultations with partner 1 and Partner 3 to discuss on D14 work
- WP4/WP5 : consultations with Partner 3 and the countries team (Partner 5,6,7,8,9) on product choices, liberalization scenarios, and the Delphi process.
- WP 6 : phone conferences to coordinate the work between Partner 4 and Partner 3 in order to liberalization scenarios in the modelling work.

- Advisory group and coordination with MEDFROL

This year we had several contacts with the EU Commission officials. It is due to the specific needs we raised regarding the elaboration euro-med liberalization scenarios.

We had two meetings this year :

*16 June 2005 – Brussels : Organization of a meeting with the participation of DG AGRI and DG TRADE and MEDFROL – How to build partial euro-med liberalization scenarios”

* 14 February 2006 : Participation and presentation of the EU-MED AGPOL project and preliminary results in the workshop organized by the JRC-IPTS and DG research in

collaboration with DG AGRI on Euro-Med Association Agreements – Agricultural Trade – Regional Impacts in the EU

2) Project timetable and status

Table 3 provides an overview of the work packages and progress during this reporting period

The project has achieved the objectives originally planned. During the second period the WP1, 2, 3 was completed. We had activities in work packages 4, 5, 6, 7, 8 plus 9. (dissemination of results).

Table 3 : Project timetable and status

Acronym : EUMED AGPOL Contract n° : SSPE-CT-2004-502457	12 month 1st period 1st year												24month 2nd period 2nd year												36 month 3rd period 3rd year														
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36			
Month	Apr-04	May-04	Jun-04	Jul-04	Aug-04	Sept-04	Oct-04	Nov-04	Dec-04	Jan-05	Feb-05	Mars-05	Apr-05	May-05	Jun-05	Jul-05	Aug-05	Sept-05	Oct-05	Nov-05	Dec-05	Jan-06	Feb-06	Marc-06	Apr-06	May-06	June-06	Jul-06	Aug-06	Sept-06	Oct-06	Nov-06	Dec-06	Jan-07	Febru-07				
Date	1	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30	15	30
WP1 : characterize the agricultural and agro-industry sectors in Mediterranean countries																																							
WP2 : Characterize the agricultural sectors in major European regions for production of fruits, vegetables, and olive oil																																							
WP3 : Describe and quantify the EU protection systems for fruits, vegetables, and olive oil																																							
WP4 : Develop specific liberalization scenarios																																							
WP5 : Estimate the production and export potential for each Mediterranean country																																							
WP6 : Quantify possible changes in European and Mediterranean production, imports, and exports of important commodities																																							
WP7 : Interaction with word markets and international negotiations																																							
WP8 : estimate the changes in European production, incomes, ag budgets, social changes, and other impacts																																							
WP9 : Diffuse results																																							

PERIODIC ACTIVITY REPORT

2nd period from 1st March 2005 to 28 February 2006

Plan for Using and Disseminating the Knowledge

Annex : Plan for using and disseminating knowledge

Policy research does not have impact unless it reaches those who make or influence policy. It also has greater impact if those players have been involved in advisory roles at all stages of the research. Through our research design, we have made sure that users and professionals in the field are incorporated in the research process. In both EU and Mediterranean countries, we will ensure that policy makers and staff have ample opportunity to participate and to comment on project progress.

We are equally committed to diffusing the results so that a wide audience of researchers, public, and press are informed. To that end, project professional staff will be available for seminar and conference presentations throughout the duration of the project. Also, the following actions will be taken:

- Papers will be submitted to major professional journals on the impact analyses conducted.
- Public education materials will be prepared in the form of popular publications and press information materials.
- A European conference (joint with the MEDFROL project) will be held near the end of the project to communicate the results to both professional and popular audiences.
- A project web site will be maintained throughout the project to make available data, results, and progress reports. Details of the content and structure of the web site are provided below.
- A summary volume will be produced containing the impact estimates plus a summary of the results from the earlier tasks.

Since our project has nine partner institutions plus other researchers on the steering committee, good communication among the project participants is critical for effective functioning of the project. To ensure strong communication, we will use email, phone contacts, meetings, e-meetings and a website. The project is tightly designed so that each partners knows what is required from their contribution, but sharing of preliminary reports and ideas will help improve the quality of all the outputs.

Project Web site

The project web site is central to our dissemination efforts. The web site address is <http://eumed-agpol.iamm.fr>. Links to the web site are currently available on the partners institutions web sites. The image of the home page is captured in Figure 1.

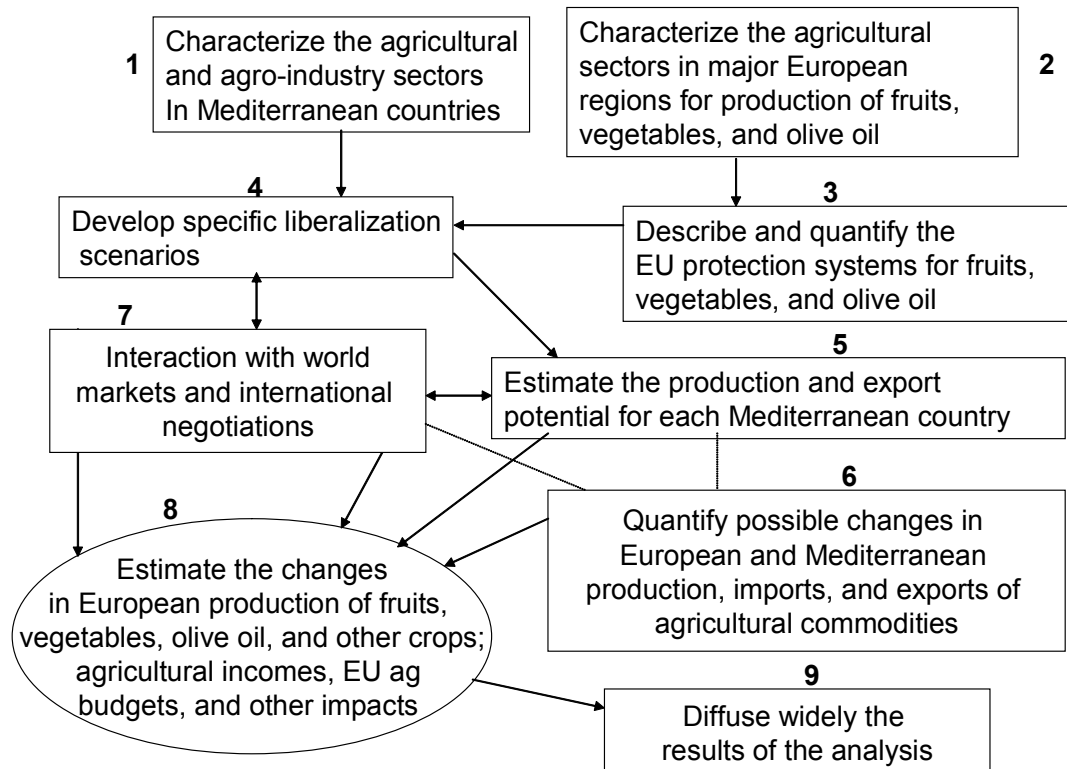
Figure 1



The site is currently divided into the following areas:

- Home
- Project presentation – provides:
 - a. a general overview of the project and a description of each of the work packages plus the chart showing how they fit together (Figure 2).
 - b. A list of the deliverables for each work package.

Figure 2



- Partners – provides the name and contact information for each partner plus a link to each partner’s web site
- Publications – provides project reports (deliverables), publications from partners and others references relevant to the project activities
- Data – provides data that is being used in the project analysis and that can be used by others for whatever other needs may exist. It contains
 - c. Spreadsheets on agricultural situation of Mediterranean countries, containing general economic indicators and production and yields for agricultural products.
 - d. Fruits and vegetables trade matrices give trade between all countries in the world for selected fruits and vegetables. Data users can use the “pivot table” function in Excel to structure the data to suit their needs. The original source of this data is FAO.
 - e. Selected tables and graphs particularly relevant for our topic give information about EU -Trade of agricultural commodities and fruits and vegetables, at a detailed level.
- Project agenda – It contents information on meetings and other events that is relevant to the project and project participants
- Partners only – this section of the site contains data, draft reports, methodological papers etc. that can only be accessed by project participants. It is organised by work

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package and is intended to permit a quicker exchange of information among participants. Access to this area requires a user name and password.

- Quick link - Gives link to each partner's web site and to some usefull others web site
- Contact - provides a simple means for interested parties to contact project management.

Obviously, the content of the project web site will evolve over time as analysis is completed and reports are produced.

1. Project deliverables

The project has 27 substantive deliverables plus the management reports required by the contract. The list of deliverables is contained in Table 1. The project began in March 2004, so the projected deliverable date counts from that point.

Table 4 : Project Deliverables

Deliverable No	Deliverable title	Delivery date	Nature	Dissemination level
D01	Project Presentation	4	R	PU
D02	Plan for using and disseminating knowledge	6	R	PP
D03	Progress report to the European Commission	12	R	PP
D04	Progress report to the European Commission	24	R	PP
D05	Progress report to the European Commission and final plan for using and disseminating knowledge	36	R	PP
D1	Project Web site	4 - with frequent updating throughout the project	O	PU
D2	Characterization of the Moroccan Agricultural Sector with Special Emphasis on Fruits, Vegetables, and Processed Foods	7	R	PU
D3	Characterization of the Turkish Agricultural Sector with Special Emphasis on Fruits, Vegetables, Olive Oil, and Processed Foods	7	R	PU
D4	Characterization of the Tunisian Agricultural Sector with Special Emphasis on Olive Oil	9	R	PU
D5	Characterization of the Egyptian Agricultural Sector with Special Emphasis on Fruits and	11	R	PU

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	Sector with Special Emphasis on Fruits and Vegetables			
D6	Characterization of the Israeli Agricultural Sector with Special Emphasis on Fruits, Vegetables, and Processed Foods	13	R	PU
D7	Characterization of Mediterranean Agriculture with Special Emphasis on Fruits, Vegetables, Olive Oil, and Processed Foods	15	R	PU
D8	Characterization of European Fruit Production and Markets	12	R	PU
D9	Characterization of European Vegetable Production and Markets	12	R	PU
D10	Characterization of European Olive Oil Production and Markets	14	R	PU
D11	Characterization of European Production and Consumption of Processed Fruits and Vegetables	15	R	PU
D12	Characterization of European Production and Consumption of Fruits, Vegetables, Olive Oil, and Processed Fruits and Vegetables	17	R	PU
D13	Description and Quantification of the EU Protection for Imported Fruits, Vegetables, Olive Oil, and Processed Foods from Mediterranean Countries	15	R	PU
D14	Description and Quantification of Mediterranean Country Protection of Imported Agricultural Commodities Important to the EU	15	R	PU
D15	Alternative Liberalization Scenarios for EU – Mediterranean Country Trade	18	R	PU
D16	Moroccan Production and Export Potential for Fruits, Vegetables, and Processed Foods – An Expert Panel Analysis	19	R	PU
D17	Turkish Production and Export Potential for Fruits, Vegetables, Olive Oil, and Processed Foods – An Expert Panel Analysis	20	R	PU
D18	Tunisian Production and Export Potential for Olive Oil – An Expert Panel Analysis	21	R	PU
D19	Egyptian Production and Export Potential for Fruits and Vegetables – An Expert Panel Analysis	23	R	PU
D20	Israeli Production and Export Potential for Fruits, Vegetables, and Processed Foods – An	25	R	PU

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	Expert Panel Analysis			
D21	Mediterranean Production and Export Potential for Fruits, Vegetables, Olive Oil, and Processed Foods	27	R	PU
D22	Impacts of Alternative Trade Liberalization Scenarios on Turkish Agriculture with Special Emphasis on Fruits, Vegetables, Olive Oil, and Processed Food Products	28	R	PU
D23	Impacts of Alternative Trade Liberalization Scenarios on Moroccan Agriculture with Special Emphasis on Fruits, Vegetables, and Processed Food Products	29	R	PU
D24	Quantitative Assessment of EU-Mediterranean Trade Liberalization Using the CAPRI Modeling System	30	R	PU
D25	Interaction and Linkages Between EU – Mediterranean Trade and World Markets and Multi-lateral and Bi-lateral Negotiations	30	R	PU
D26	Conference on the Impacts of EU – Mediterranean Trade Liberalization	34	R	PU
D27	Analysis of EU – Mediterranean Trade Liberalization – How Would the Agricultural Sectors and Economies Be Changed?	36	R	PU

Deliverable D01, the project presentation is contained in that section of the project web site. This report constitutes deliverable D02.

The substantive deliverables (D2-D27) are being provided to the EC as reports and placed on the project web site. In addition, the content of the reports, and sometimes the reports themselves, will be published and distributed through other outlets. At its launch meeting in March 2004 the project established publication guidelines, which contain the following three points:

- Everyone is encouraged to publish in the best possible journals results coming out of the project.
- All publications must cite the project EUMED-AGPOL.
- Each principal author is encouraged to include co-authors as appropriate according to their contributions.

Thus the project has a comprehensive plan for using and disseminating knowledge gained over the course of the project.

The following table provides the publications related to the project for this year.

2. Dissemination of knowledge

Table 5 : Actual and currently planned Publications Overview table

Partner responsible involved	Actual dates	Type &References	Type of audience
Partner 1 CIHEAM-IAMM	Jul 04 - with frequent updating throughout the project	Project web-site http://eu-med-agpol.iamm.fr	Research/ General public
	10/2005	Articles JACQUET F. CAKMAK E. (2005). Adhésion de la Turquie à l'Union Européenne : un élargissement agricole plus délicat que les précédents ? Revue Demeter Economie et stratégies agricoles.	Research/ General Public
	2006	EMLINGER C., JACQUET F., PETIT M. (2006) Enjeux de la libéralisation agricole dans la zone méditerranéenne. Région et Développement (<i>forthcoming</i>)	Research
	8/2005	PETIT M.(2005). Les négociations agricoles à l'OMC : où en sont elles ? Cahiers Agricultures 14-4 399-403, Juillet – Août 2005	Research
	10/2005	PETIT M. (2005). OMC, Honk Kong 2005 : Quelles perspectives pour l'agriculture des pays en développement – Horizons bancaires, 326, 99-106, Octobre 2005	Research/ General Public
		Conference papers and presentations	
	11/2005	CHEVASSUS-LOZZA E., EMLINGER C., GALLEZOT J. , JACQUET F. (2005). Les accords commerciaux Euro-Méditerranéens : état des lieux et perspectives dans la filière fruits et légumes- 3èmes rencontres du végétal – INH Angers. 17 et 18 novembre 2005. Angers	Research/ Private Sector

9/2005	EMLINGER C. (2005) Mediterranean Fruit and Vegetables trade: Access to the European Market. - European EAAE PhD Workshop 22-23 septembre 2005 Wageningen	Research
3/2005	EMLINGER C. (2005) Impacts de la libéralisation des échanges de fruits et légumes entre l'Union Européenne et les Pays Tiers Méditerranéens. Présentation au séminaire doctoral - EMMA (GDRI EMMA-RINOS) 18 mars 2005 St Quentin en Yvelines	Research
6/2006	EMLINGER C., CHEVASSUS-LOZZA E., JACQUET F. (2006). EU Market Access for Mediterranean fruit and vegetable : A gravity model assessment - EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives" - 29 June-2 July, 2006 – Chania	Research
6/2006	PETIT M., JACQUET F., EL HADAD F., TYNER W. (2006). Agricultural Trade Liberalization in the Mediterranean region : a complex and uneven process - EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives" - 29 June-2 July, 2006 - Chania	Research
1/2006	LEMEILLEUR S., TOZANLI S. (2006). A win-win relationship between producers' Unions and supermarket Chains in Turkish fruits and vegetables sector. Communications at the International seminar USAID Regional Consultation on linking farmers to markets. Cairo, Egypt 28 January – 3 February 2006	Research/ Private Sector
4/2005	JACQUET F. (2005). PAC, Euroméditerranée : quelles conséquences pour l'agriculture méditerranéenne française ? Présentation aux journées IFOCAP, les rencontres méditerranéennes - 2 ^{ème} journée - 12 Avril 2005	Private sector
12/2005	PETIT M. (2005). A quelles conditions la mondialisation peut elle profiter aux pays en développement. Communications à la conférence « Honk Kong 15, organisée par l'AAFDI et la fondation FARM, Paris 30 Novembre-1 ^{er} Décembre 2005	General Public/ Private Sector
12/2005	PETIT M.(2005). Indicateurs de compétitivité : leçons d'un projet pilote, 4 ^{ème} séminaire institutionnel du CGDA Rabat 2-3 Décembre 2005	Policy makers
2/2006	JACQUET F., BRITZ (2006). W. EUMED AGPOL Project Presentation, Joint Workshop on Euro-Med Agricultural Trade Negotiations, Brussels, 14 February 2006	EU Commission Officials

	3/2006	JACQUET F. (2006). EUMED AGPOL Project Presentation, Seven Framework Programme (FP7) (2007-2013) Towards a Euro-Mediterranean Agricultural Research Area, Rabat Forum 6/7 March 2006	General Public
Partner 2 - ENSA M		<p>Articles</p> <p>RASTOIN J.L., AYADI N., MONTIGAUD J.C. (2006). Vulnérabilité régionale à l'ouverture commerciale internationale : le cas des fruits et légumes dans l'Euro-Méditerranée, in Deblock F., Regnault H., Intégrations régionales et stratégies de développement, Ed. Athéna, Montréal (<i>forthcoming</i>).</p> <p>Conference papers and presentations</p> <p>RASTOIN J-L, AYADI N., MONTIGAUD J-C (2005). Vulnérabilité régionale à l'ouverture commerciale internationale : le cas des fruits et légumes dans l'euro-Méditerranée. Colloque RINOS (Réseau Intégration Nord Sud - GDR CNRS EMMA) Montréal, 2-3 juin 2005, Organisé en partenariat avec le «Centre Etudes Internationales et Mondialisation» de l'Université du Québec à Montréal Intégrations régionales et stratégies de développement : Les relations Nord-Sud dans l'Euromed, les Amériques et l'Asie.</p> <p>RASTOIN J-L, MONTIGAUD J-C (2006). Measuring impact of trade liberalization : the regional vulnerability index – The case of fresh fruit and vegetable in Euro-Mediterranean countries - EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives"- 29 June-2 July, 2006 - Chania</p> <p>MONTIGAUD J-C, GIACOMINI C., BRIZ J. (2006). Impact of agricultural trade liberalization between the EU and Mediterranean countries : the case of the tomato processing industry - EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives"- 29 June-2 July, 2006 – Chania</p>	Research

Partner 3 - INRA Nantes	11/2005	Conference papers and presentations CHEVASSUS-LOZZA E ; EMLINGER C ; GALLEZOT J., JACQUET F. (2005). Les accords commerciaux Euro-Méditerranéens : état des lieux et perspectives dans la filière fruits et légumes. 3èmes rencontres du végétal – INH Angers. 17 et 18 novembre 2005. Angers	Private sector
	6/2006	EMLINGER C., CHEVASSUS-LOZZA E. and JACQUET F., Mediterranean Fruit and Vegetables trade: Access to the European Market. EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives" - 29 June-2 July, 2006 – Chania	Research
	6/2006	CHEVASSUS-LOZZA E., GALLEZOT J. (2006). What are the consequences of multilateral negotiations on the Euro-Mediterranean process? European fruit and vegetable market access for Mediterranean countries. EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives" - 29 June-2 July, 2006 - Chania	Research
	6/2005	CHEVASSUS-LOZZA E., GALLEZOT J., (2005). The protection system for fruit and vegetables in the EU. EU-MED AGPOL, DG AGRI meeting Brussels, June 2005.	EU Commission Officials
Partner 4 - IAP - Bonn	6/2005	Conference papers and presentations BRITZ W., HECKELEI T., PEREZ I, JUNKER F. AND C. WIECK:(2005) How sustainable is the latest CAP Reform under the possible Trade Liberalisation Outcomes of the Doha Round?, paper presented at the IATRC summer meeting 2005, Sevilla, June 16/17 2005: "Pressures for Agricultural Reform: WTO Panels and the Doha Round Negotiations	Research
	6/2005	IATRC summer meeting Seville, Spain, June 16/18 2005	Research
	12/2005	IATRC annual meeting December 4-6 2005 San Diego, USA	Research
	6/2005	Meeting with DG-AGRI/DG-TRADE in Brussels in 16th June 2005	EU Commission Officials

Partner 5 - CSIC	6/2006	<p>Articles</p> <p>MILI S. (2006) "Olive Oil Marketing in Non-Traditional Markets: Prospects and Strategies", <i>New Medit</i>, 2/06 (June 2006). (forthcoming).</p> <p>Book Chapters</p> <p>MILI S. & RODRÍGUEZ-ZÚÑIGA M. (2005). "El sector de aceite de oliva español. Transformaciones estructurales recientes y estrategias empresariales". In: <i>Mercados agroalimentarios y globalización. Perspectivas para las producciones mediterráneas</i> (S. Mili & S. Gatti, coords.). Madrid: Editorial pp. 93-107.</p> <p>MILI S. & RODRÍGUEZ-ZÚÑIGA M. (2005). "Le secteur de l'huile d'olive face aux nouveaux défis de la concurrence internationale". In: <i>Les défis de la Terre. L'agriculture en Espagne et en Tunisie face aux défis de la libéralisation</i> (F. Ceña, M. Elloumi, R. Gallardo & M.B. Sai, coords.). Tunis: Cérès-Éditions-IRESA pp. 181-202.</p> <p>MILI S. (2005). "Prospects for Olive Oil Marketing in Non-Traditional Markets". In: <i>Sustainable Development and Globalization of Agri-Food Markets</i> (J.P. Gervais, B. Larue & J.L. Rastoin, Eds.). Québec: CREA, Université Laval, pp. 503-531</p> <p>Conference papers and presentations</p> <p>MILI S. (2006). Olive Assessing global market dynamics and policy reforms for EU olive oil - EAAE seminar "Marketing Dynamics within the Global Trading System : New Perspectives" - 29 June-2 July, 2006 – Chania</p>	Research Research/ General Public General Public Research
Partner 6 - METU	10/2005	<p>Articles</p> <p>JACQUET F. CAKMAK E. (2005). Adhésion de la Turquie à l'Union Européenne : un élargissement agricole plus délicat que les précédents ? <i>Revue Demeter Economie et stratégies agricoles</i> - 2006</p>	Research/ General Public

Conference papers and presentations	
6/2005	<p>ERUYGUR, H. O., and E. H. CAKMAK (2005), "Trade Implications of Extending Turkey-EU Customs Union to Agricultural Products", Paper presented at the Conference of "Middle East and North African Economies: Past Perspectives and Future Challenges" (Published at Conference Proceedings CD of ECOMOD-MENA), Brussels, Belgium, June 2-4.</p>
7/2005	<p>ERUYGUR O., CAKMAK E (2005). The Impact of the EU Membership on agriculture in Turkey International Conference on Policy Modeling (Ecomod 2005). Istambul, June 29-July 2-2005. http://www.ecomod.net</p>
10/2005	<p>ERUYGUR, H. O., and E. H. CAKMAK (2005), "Turkey's Imports of Agricultural Products and EU: An Empirical Assessment of Membership", paper presented at the conference of "The Channels of European Integration" (To be published at Conference Proceedings), Warsaw, Poland, October 7-8</p>
1/ 2006	<p>ERUYGUR, H. O., and E. H. CAKMAK (2006). "Analysis of EU Membership of Turkey on Turkish Agriculture: A Sector Model Approach with Maximum Entropy", Paper presented at the 96th. Seminar of European Association of Agricultural Economists named "Causes and Impacts of Agricultural Structures" (<i>forthcoming Chapter</i> in the Book of "Causes and Impacts of Agricultural Structures", Nova Publishing), Taenikon, Switzerland, January 10-11.</p>
6/2006	<p>CAKMAK E.H, ERUYGUR H. (2006). Potential effects of EU Membership on Agricultural production and trade in Turkey - EAEE seminar "Marketing Dynamics within the Global Trading System : New Perspectives" - 29 June-2 July, 2006 – Chania</p>
6/2005	<p>International Conference of "Middle East and North African Economies: Past Perspectives and Future Challenges", Organized by Free University of Brussels, (Brussels), and Co-organized by Middle East Economic Association (MEEA) and; Global Economic Modeling Network (ECOMOD), Belgium, June 2-4, 2005.</p>
10/2005	<p>International Conference of "The Channels of European Integration", Organized by Warsaw School of Economics, Institute of International Economics; University of Tübingen, Department of Economics; and Institute for Applied Economic Research (Tübingen), Warsaw, Poland, October 7-8, 2005.</p>

	11/2005	Workshop: 3 rd CAPRI – Training Session 2005 (<i>In the context of CAPRI-Dynaspat Project</i>), November 28-30, by University Bonn, Institute for Agricultural Policy, Market Research, and Economic Sociology, Bonn, Germany.	Research
	1/2005	96 th . Seminar of European Association of Agricultural Economists (EAAE): "Causes and Impacts of Agricultural Structures", Taenikon, Switzerland, January 10-11, 2006	Research
Partner 7 - IAV Hassan II		Conferences papers and presentations	
	9/2005	AKESBI N. (2005). La Méditerranée comme zone de libre-échange à partir de 2010 : Quelles conséquences pour l'agriculture, pour l'alimentation et pour la recherche agronomique ? Conférence « Sharing knowledge across the Mediterranean, de l'Association Française pour l'Avancement des Sciences. Casablanca, 5-7 septembre 2005 (<i>forthcoming</i>)	Research/General public
	9/2005	AKESBI N. (2005). Comment célébrer le 10 ^{ème} anniversaire des accords de Barcelone ? Déjeuner - Débat avec Joseph Borell, Président du Parlement européen Fondation Abderrahim Bouabid, Salé, 15 septembre 2005.	General Public
	11/2005	AKESBI N. (2005). Créer un espace de solidarité agricole et agroalimentaire : Quelle alternative pour repenser l'avenir ? Expertise et action économique en Méditerranée, Forum international de l'Institut de prospective de Calame (Comité d'Analyse et de Liaison des Acteurs de la Méditerranée), Marseille, 24-26 novembre 2005.	Research

Partner 8- IO Sfax	5/2005	Conferences and presentations : KARRAY B., LAHIANI J., KANOUN F. (2005). The European olive oil imports coming from the third countries: Regimes, evolution and determinants. SMA 2, SFAX 18-21 May, 2 th international symposium: Productivity, quality and partnership agreements. KARRAY B. (2005). Strategies of merchandising of the olive oil in Tunisia: Challenges and perspectives to the export. Seminary on the trade: National challenge and portal of foreign markets in the era of the numeric. Olive oil: realities, strategies and perspectives in the era of the electronic trade. Zarzis 9 September. KARRAY B. (2006). Olive oil world market dynamics and policy reforms: Implications for Tunisia. Communication accepted to be presented in the 98 th EAAE Seminar entitled "Marketing Dynamics within the Global Trading System: New Perspectives" that will take place from June 29 th to July 2 nd , 2006 in Chania, Crete	Private sector / General Public General Public Research
	9/2005		
	6/2006		