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Effectiveness and Potential of European Trade and Assistance Policies in the South Mediterranean Neighbourhood in the Fields of Agriculture, Water and Rural Development: The Case of Tunisia

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Abstract

This paper is part of a series of working papers to assess EU policies in the Southern and Eastern Mediterranean countries from a bottom-up perspective as part of the MEDRESET project. The focus of this paper will be on challenges and policies applied in the agriculture and water sectors in Tunisia. Special consideration will be given to the problems of international trade, particularly the Deep and Comprehensive Free Trade Agreement. The methodology used includes content analysis, literature review and face-to-face interviews with relevant local stakeholders in the agriculture and water sectors. In particular, the paper will provide the following: (i) a clear assessment of the problems and obstacles that are currently affecting the performance of the water and agriculture sectors, (ii) an outline of the national and EU policy actions in the sectors; (iii) a qualitative analysis of stakeholder frames in the area of agriculture and water based on 27 interviews; and lastly (iv) how EU policies in Tunisia may be improved or replaced according to the needs of the sector.

Introduction

Agriculture and water are two sectors that define the strength of a country's economy and act as indicators of its socio-economic conditions. These two sectors are constantly shaped by policies applied both nationally and internationally. Hence, these policies should be carefully assessed and amended accordingly in order to further develop the fields of agriculture and water. In particular, MEDRESET Work Package 5 (WP5) aims at evaluating the effectiveness and potential of EU trade and assistance policies in the area of agriculture and water (including trade liberalization, EU-funded agro-food and water projects and cooperation initiatives) in light of different bottom-up actors' interests, needs and expectations, with the purpose of identifying inclusive, responsive and flexible policy actions to reinvigorate Euro-Mediterranean relations (Chaaban et al. 2017).

In the Southern and Eastern Mediterranean (SEM) countries, a large percentage of the labour force is employed by the agriculture sector; however, in both developing and developed countries, the agriculture sector has seen its share in GDP diminishing especially compared

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to the industrial sector. The bottom-up approach in this research is particularly suitable for the agriculture sector, since agriculture contributes greatly to employment. There are various stratifications in the actors who contribute to this sector, and to get accurate information special attention has been given to the local actors starting with small agents such as farmers. Farmers undeniably occupy the largest base among the contributing actors; they also have a unique perspective and a more realistic approach given the nature of their work and direct contact with the means of production. This paper is interested in how these actors perceive the political policies imposed nationally and internationally in the agriculture and water sectors, and the extent to which these policies provide equal opportunities to small-scale farmers to expand their network and increase the quality of their crops. Additionally, the project takes into consideration gender roles in the region, and how the demanding nature of work on farms may have contributed to limiting the likelihood of women participating in farm work. Moreover, since there is segmentation in the agricultural sector, there is no coherent categorization of the labour force. Thus, moving up the scale of actors, we will find an array of small-scale to large-scale farmers with different property rights: those who became landlords with the nationalization movements (mid 1950s), and those who struggled after the economic liberalization movements to own their own land, making them landless farmers.

Our methods of collecting data from small and big actors include but are not limited to interviews, literature review and content analyses of relevant stakeholders. Every agent that could possibly affect or be affected by the EU policies in the agriculture and water sectors was included, such as governmental institutions, the private sector, NGOs and trade unions. International actors such as global NGOs and international organizations (IOs) were also included.

This paper is both analytical and critical of the EU's policies and actions in the agriculture and water sectors in the SEM countries as there has been an increasing criticism of the EU's approach towards the region and the extent to which its policies are based on actual conditions. Moreover, there has been a notable lack of publications and data that put the EU's policies under examination. Thus, the MEDRESET project strives to shed new light on the EU's policies by integrating the relative prospects and recommendations of the SEM countries, which may not have been previously articulated.

This paper will tackle the following: (i) a clear assessment of the problems and obstacles that are currently affecting the performance of the water and agriculture sectors, (ii) an outline of national and international actions, aimed at identifying the mechanisms of the sectors; (iii) a qualitative analysis of stakeholders frames in the area of agriculture and water; and lastly (iv) how EU policies on water and agriculture in Tunisia may be improved or replaced according to the needs of these sectors.

1. Background Information on Tunisia

1.1 Agriculture and Water Profile

Since ancient history, Tunisia has been an agricultural country. This image has persisted throughout the social, demographic and economic transformations that the country has witnessed, and which have led to a reduction in the impact of agriculture on the Tunisian economy which no longer represents around 20 per cent of GDP as in the 1970s, but only 8 to 9 per cent.[2] However, the added value of the agriculture and fishing sectors increased by 11.9 per cent during the first three months of 2018 (INS 2018: 4) due to the remarkable growth recorded mainly in olive production, there was more than twice as much production as the previous season, according to the latest data from the agriculture, water resources and sea fishing sectors.

Although the Tunisian population has not rapidly increased, the population in the countryside has markedly decreased, thereby reducing the number of people employed in the agriculture sector. The rate of urban population, which was 37.5 per cent in 1960, reached 68.6 per cent in 2015[3] and is expected to exceed 70 per cent by 2030 (UNDESA 2018).

According to the national survey of employment in 2017, agriculture only employs 14.3 per cent compared to 52.3 per cent in the service sector and 18.3 per cent in industry (INS 2017: 3). According to the Public Administration for Agricultural Researches and Development, employment in this sector provided approximately 152.4 million working days in 2015. The majority of this figure was family workforce (75 per cent), 15.3 per cent was temporary workforce while the rest (about 9.3 per cent) was permanent, which indicates the precarity of employment in the agricultural sector. It is worth noting that the percentage of women in the family workforce equals 34.4 per cent, and reaches up to 42.5 per cent in temporary labour, and also accounts for only 20.7 per cent of the permanent labour. Agricultural female labour is exposed to difficult working conditions and repeated accidents, especially on their way to work (MAWRF 2017: 20).

The total agricultural area represents 10.5 million hectares (65 per cent of the country's total area). The cultivated area is about 5 million hectares, forests and grassland 5.5 million hectares, the watered area about 425 thousand hectares in 2014, 55 per cent of which is publicly owned while the rest is private. Fifty percent of these agricultural regions are located in the north, 39 per cent in the centre and 10 per cent in the south (MAWRF 2017: 39–46). The distribution of land is one of the structural problems of agriculture in Tunisia since 75 per cent of agricultural lands are less than 10 hectares, indicating a large fragmentation of lands.

Tree crops cover approximately half of the cultivated land, with 1.5 million hectares devoted to olive plantation while cereal seeding lands represent 36 per cent, four-fifths of which are located in the north of the country.[4]

Investment in agriculture is estimated at about 10 per cent of the country's total investments. These investments grew by 21 per cent in the period between 2011–2015 compared to 2006–2010. This rate is considerably higher in the private sector than it is in the public sector, as shown in Table 1 below.

2 World Bank Data, *Agriculture, forestry, and fishing, value added (% of GDP): Tunisia*, https://data.worldbank.org/indicator/NV.AGR.TOTL.ZS?locations=TN.
3 World Bank Data, *Urban population (% of total): Tunisia*, https://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS?locations=TN.
4 INS website: *Agriculture: Plant Production: Harvested Area*, http://www.ins.tn/en/themes/agriculture.

Table 1 | Distribution of investments in the agricultural sector between the private and the public sectors, 2006–2010 and 2011–2015 (million dinars)

	2006–2010	2011–2015	Growth rate (%)
Public sector	2,010	2,350	17
Private sector	2,769	3,453	25
Total	4,779	5,803	21

Source: MAWRF (2016: 10).

1.2 Main Policy and Legislative Issues and Developments in the Area of Agriculture and Water

1.2.1 National Level

The growth rate in investments between 2006–2010 and 2011–2015 was not equally distributed across all sectors, as it was meagre in water and agricultural irrigation sectors (0.7 per cent), despite the importance of the latter, whereas investments in water and soil increased by 60.5 per cent. The fisheries, livestock and forestry sectors have attracted investor attention (with growth rates estimated at 85, 16.5 and 14.6 per cent respectively), while integrated agricultural development projects and fruit tree sectors have witnessed a recession in investments (MAWRF 2016: 10). The balance of food trade remains unsettled as data indicate that imports coverage is about 70 per cent; exports in agricultural products have improved during the first eight months of this year compared to the same period last year (growth of 13.9 per cent) thanks to the important role of olive oil in improving exports (MAWRF 2018b).

Generally, the Tunisian agricultural production grew in all sectors especially in the cereals, citrus fruits and white meat sectors in the period 2011–2015 compared to 2006–2011, as shown in Table 2. Despite the fact that cereals extend over a large portion of the cultivated land in Tunisia, they contribute only 13 per cent of the added value in the agricultural sector, and since this crop relies on rainfall, its effectiveness remains erratic and differs from one year to another.

Likewise, olive oil represents a strategic sector for Tunisia's agriculture, as well as its export sector. Olive oil exports rose to the equivalent of 50 per cent of Tunisian export revenues. It should be noted that the number of foreign markets increased from 28 during the agricultural season 2006–2007 to 50 during the period 2014–2015; 320 thousand tons of olive oil was exported out of the total production of 340 thousand tons. The amount of canned oil represents 20 thousand tons or about 6 per cent (MAWRF 2016). However, like the cereal sector, the olive oil sector is characterized by production instability and several other problems resulting from the limited productivity of olive trees.

As in the citrus fruit sector, between 2006–2010 and 2011–2015 production in the fisheries markedly increased, by 17 per cent. The following table (Table 2) shows the production growth of the most important agricultural products.

Table 2 | The most important achievements of agricultural products in the 2011–2015 period compared to 2006–2010 (thousand tons)

	2006–2010 average	2011–2015 average	Growth rate (%)
Cereals	1,680	1,900	13
Olive oil	900	934	3.8
Citrus fruits	283	359	27
Dates	147	200	36
Meat	234	240	2.6
White meat	182	260	43
Dairy products	1,016	1,170	15
Sea products	103	120	17

Source: MAWRF (2016: 14).

Forests and rangelands account for 21 per cent of the agriculture GDP and represent 35 per cent of the Tunisian geographic area (5.7 million ha). They represent "the effective resource base for alleviation of poverty in Tunisia (World Bank 2016: 9).

> However, the sector faces enormous threats. Climate change, agricultural expansion especially in rangelands, urban development and conversion to other land use practices are all contributing to ecosystem losses. Forests are mostly affected by degradation, caused by over-harvesting and overgrazing, which are particularly alarming phenomena, that reduced forage productivity and natural regeneration on a wide scale. (World Bank 2016: 10)

The water sector is one of the most sensitive sectors in the country given the scarcity of water resources and climate change challenges. The poor maintenance of dams and the lack of rationalization of consumption are among the factors that have amplified the problem. Tunisia's per capita water supply is estimated at 460 cubic meters, making it a country below the water poverty line. Tunisia has a good number of dams, but some experts believe that this is not enough to meet the citizens' needs for drinking water (Baouab and Cherif 2015).

The Tunisian government is implementing the sector's policy in the framework of Five-Year Growth-Oriented Development Plans for economic and social stability, the goals being sustainable production, access to foreign markets and improving the living conditions of smallholders. Successive Plans have focused on structural reforms (7th Plan 1987–1991), then on the enhancement of productivity (services to farmers) with the 8th 1992–1996 Plan. Increased access to international markets with the 9th Plan 1997–2001 has led to a reduction in subsidies and to liberalization of the majority of prices. The 10th Plan 2002–2005 focused on private investment and the role of smallholders in social and regional development. Through these Plans, Tunisia has pursued its strategy with the mobilization of water resources by extension of irrigated areas and the generalization of water-saving equipment, the search for greater self-sufficiency in production including olive oil, cereals, potatoes, tomatoes, milk, red meats and products of the sea, for which certain prices remain administered (cereals, milk) or certain circuits controlled by the state through monopolies (cereals, olive oil) or incentives for the import and export of food products (Richard 2006: 33–4).

Until the mid-1990s, the model on which Tunisian agriculture developed was based mainly on the following elements: (i) mobilization of natural resources and the facilitation of access for all of these resources; (ii) protection of the internal market; (iii) price control of raw products needed to maintain consumers' purchasing power; and (iv) support for rural development in poor areas and their integration into the national economy (Elloumi 2015: 354).

Since the 1990s, Tunisia has chosen to open the economy and free agricultural products within the framework of bilateral and multilateral agreements, especially with the European Union. In this context, the agricultural sector is called upon to take advantage of the opportunities given by these agreements. It must, also, have the ability to compete with foreign products in the local and global market. However, the adoption of a liberal policy and the withdrawal of the state from support for the agricultural sector and the rural area, have led to a deterioration of agricultural terms of trade, lower investment in the public and private sectors, the declining productivity of agriculture and deterioration of the situation of agricultural assets (Elloumi 2015: 354).

The Five Year Development Plan 2016–2020 highlights the difficulties the agriculture sector is facing (MAWRF 2016). Among these we can mention:

- The scarcity of natural resources in Tunisia, most notably water, forests and grasslands. This situation has worsened due to climate change and lack of measures to put an end to erosion, desertification and urbanization. These conditions have become distressing amidst the insecurity and corruption that became widespread after the revolution.
- Low productivity can be explained also by conditions in the real estate sector and the fragmentation of lands, which limit access to credit for investment; due to the proprietorship status, peasants cannot mortgage their lands.
- The deficiency of the production system because of lack of infrastructure, lack of training and guidance for agriculture in addition to the problems of marketing products.
- The low quality of agricultural products and health protection, especially for livestock.
- Bad governance in the agricultural sector, with institutional double standards and the absence of a clear framework for attributing duties.
- The limited quality of products, their cost and ability to compete nationally and internationally.
- Labour force: lack of training, scarcity and vulnerability.
- Poor partnership with farmers throughout the formulation of policies for the agricultural sector, resulting in policies that are unsuited to farmers' reality and needs.
- Weak scientific research system.
- Insufficient investment and funding.

To overcome these shortcomings, the Five Year Development Plan 2016–2020 states the main axes of agriculture policy which have to be improved in the next few years: developing natural resources, mitigating the effects of climate change, rationalization of the exploitation of agricultural lands, improving the production systems, encouraging agricultural investment, supporting small and family agriculture, and production and dissemination of knowledge (MAWRF 2016).

1.2.2 International Level

With these problems in mind, international partnership is considered essential in supporting the agricultural sector for better products and more competitiveness. In the framework of its programme related to food security in the Mediterranean countries, the European Neighbourhood Programme for Agriculture and Rural Development (ENPARD) was launched in 2013 to support agriculture and rural development, from which Tunisia benefited in a number of fields including water, cereals, dates and olives, among others.

According to the EU Delegation to Tunisia 2017 report, given the importance of the agricultural sector, the EU has channelled its assistance to support Tunisia's experience in rural and agricultural development through ENPARD, where the EU is implementing pilot measures. In December 2013 to January 2014, a financing agreement of the pilot action programme in Tunisia was signed. Some projects were implemented, such as "Emploi Sud Tunisie" (October 2014 to April 2017). This project "aims at enhancing the creation of jobs in the fields of agriculture and handicraft in the Medenine governorate. It fosters the integration of young people, either graduated or not, within the regional economy and responds to the farmers and cooperatives needs in terms of skills and service gaps".[5]

The European Union also supports water management through the PAPS-EAU programme, which aims at the access of all citizens to drinking water as guaranteed by the Constitution (article 44) through a comprehensive approach to better management of water resources and pollution control. In 2016, the European Union also adopted an emergency measure for Tunisia's olive oil exports. The EU has unilaterally offered, until the end of 2017, a duty-free tariff quota of 35,000 tonnes per year, or 70,000 tonnes in total, for exports of olive oil from Tunisia to the EU; this is in addition to the quota of 56,700 tonnes per year provided for in the EU–Tunisia Association Agreement (EU Delegation to Tunisia 2017b: 56).

However, the Deep and Comprehensive Free Trade Agreement (DCFTA), which is considered an advanced step in the partnership programme between Tunisia and Europe, remains one of the most important challenges facing the partnership between Tunisia and the European Community. This agreement aims at setting a framework to integrate the Tunisian economy in the European space through: (i) gradual coordination of the commercial, economic and legal regulation to reduce tariff hurdles; (ii) simplifying and facilitating customers' procedures; and (iii) improving the conditions for product access to the given markets.[6]

Thus, this agreement will permit the integration of new sectors and products in this free exchange programme with Europe, including agricultural products. However, a number of parties, especially civil society organizations (CSOs), have expressed their concern over Tunisian products especially those which do not equal the European equivalents in terms of quality and support. Hichem Ben Ahmed, the chief coordinator of the dialogue on this agreement, declared: "It is necessary to reach a balanced agreement, allowing mobility especially for professionals and service providers, in order to access to European Union service market"

5 See CIHEAM website: *Creation of jobs in South Tunisia to support agriculture and handicraft… UE Emploi Sud Tunisie*, http://www.iamm.ciheam.org/en/cooperation/projects/one_programme?programme=emploi-sud-tunisie&id=13.
6 See ALECA website: *What is DCFTA*, http://www.aleca.tn/en/?p=11.

(Ben Ahmed 2017). In the same vein, Solidar Tunisie (2017) demanded that this agreement should be: "gradual, progressive" and take into consideration the specificities of all partners and the differences in their relations.

2. Qualitative Analysis of Stakeholder Frames in the Area of Agriculture and Water

2.1 Methodology

As per the guidelines set by the MEDRESET project, the fieldwork consisted of identifying and interviewing the main stakeholders in the agriculture and water fields to ensure a diversified sample. Stakeholders interviewed included the following categories: (i) public institutions at both the central and the regional levels; and (ii) civil society actors such as syndicates, farmer-based associations and NGOs.

The first round of stakeholder consultations was conducted in Tunisia between July and December 2017. Particularly, the following questions were investigated:

- Examining the status of sectors where the interviewees work;
- The challenges of the agricultural sectors and the problems they face;
- The measures taken to overcome these problems;
- The government's programmes and procedures;
- Partnership with the European Union;
- The vision towards the projects funded by the EU;
- The vision for the Mediterranean space.

Based on a first report which summarized perceptions and expectations of the stakeholders, we formulated the questionnaire for the second round of stakeholder consultations which was conducted between January and May 2018. The questionnaire focused more on the European policies and EU–Tunisia negotiations, particularly within the DCFTA (see Annex 3 for the questionnaire).

A total of 37 stakeholders were contacted. However, only 27 interviews were conducted, face to face and by phone, due to the unresponsiveness of many stakeholders and despite the extensive efforts exerted in following up. Stakeholders were contacted by means of written official requests (public institutions) and by phone. The project flyer was given to stakeholders during the interview or attached to the official request. The interviews involved 12 stakeholders from public institutions and 15 from CSOs. Among them were 21 males and 6 females (see Table 3 and Annex 2 for the list of interviewees). The duration of interviews was between 30 minutes and 2 hours. In line with MEDRESET's data management plan, all interviews were anonymous.

Table 3 | Overview of the interviewees

Type of stakeholder	Male	Female	Total
Public institutions	8	4	12
CSOs	13	2	15
Total bottom-up actors	21	6	27

2.2 Framing Agriculture and Water within a Broader Policy Context

The survey tackled the question of the agricultural sector conditions in which the interviewed stakeholders operate. Most of the time the answers were negative regarding the condition for all sectors, except for the major cereal crops sector.

As for the livestock sector, the responses were different, reflecting the disparities between the regional and the national levels; responses hovered between average and bad (Interviewees 3, 7, 17). By contrast, institutional stakeholders on the regional level considered the conditions of this sector as good (Interviewees 4, 11). However, in an interview released to a newspaper, Mr. Bouzid Zayyeni, the head of the Tunisian syndicate for farmers SYNAGRI, said that:

> the only talk today is of the bale of hay which price has reached 20 dinars while it was only 10 dinars a month ago, although the law imposes that it must not exceed 8 dinars so that farmers can continue their activities and protect the sustainability of this sector. On the contrary, we notice that up to now the Ministry of Agriculture, Water Resources and Fisheries [MAWRF] has not reacted in spite of the worst conditions which become a real catastrophe for the breeders of livestock. (Al Shareef 2016)

The irrigated agriculture sector was one of the sectors where the answers were mixed and varied from very good on the part of institutional representatives (Interviewees 3, 4) to bad on the part of a non-governmental organization representative (Interviewee 7). However, the latter confirmed that "attempts are being made to provide the necessary support to the wealth of untapped resources" (Interviewee 7). Moreover, this sector suffers from a number of problems such as excessive exploitation of public irrigated areas, lack of the control of the production process, and the indebtedness of peasants as well as real estate problems (Interviewees 6, 11, 17).

On the other hand, all the answers were consistent for the forestry sector in terms of characterizing it as suffering from a major crisis. Forestry was described by one of the interviewees as "the weakness of the agricultural system in Beja" (Interviewee 3).

As for the fisheries, the situation is described by respondents as very difficult and bad (Interviewees 2, 5, 9, 12, 16). This is because there are many structural problems. A response from a civil society stakeholder is that the "sea fishing sector [is experiencing] a major mess in front of the absence of a national vision able to respond to the problems and challenge" (Interviewee 14). This was confirmed by the secretary general of the National Union of Blue Fishing for *Le Maghreb* newspaper who stated that the status of the fishing sector in Tunisia is deteriorating steadily, which has become a real threat to the national marine wealth.

The majority of the interviewees consider that the water sector is very poor due to climate factors. The lack of maintenance of dams and of rationalization of consumption are among the factors that have amplified the problem (Interviewees 3, 4, 6, 7, 13, 14, 18). One of the respondents said that "despite efforts to clear the water dams, the capacity of wastewater treatment plants does not meet the specifications, especially [given] that the wastewater of the surrounding cities pours into the dams" (Interviewee 3).

As for the agricultural transformation of the food sector, many interviewees pointed out the deficiency in this sector, despite the improvement in some sectors such as milk (Interviewees 1, 7, 11, 16). An interviewee argued that the dairy production project helped to strengthen small livestock breeders (Interviewee 7). In fact, according to some interviewees, the sector has experienced real dynamism thanks to improved quality, diversification of production, modernization of the production and distribution apparatus and strong development in neighbouring markets (Interviewee 1, 11). However, weak production and instability, weak local market and limited exportation are obstacles to this agro-food sector (Interviewee 1). Indeed, respondents did not express any satisfaction with the state of the wine production sector. One of the respondents said that the sector is very poor (Interviewee 11).

The olive oil sector is stable, although it is closely related to the climatic factors. The abundance of the production can be explained by the expansion of olive growing and the rise in global demand for olive oil (Interviewees 1, 11, 17). Date palm production, which is particularly concentrated in the south-west, was described as good by a respondent from a non-governmental organization who valued the citizens' participation in this sector (Interviewee 8).

Respondents cited many changes in the sectors they have been working in since the beginning of their careers. In the fishing sector, for example, they pointed the new national fishing strategies. Indeed, the issue of exploitation is regulated by greater control over biological breaks and by the development of the Special Initiative for Fish Farming, Small Fishermen (Interviewees 2, 5, 9, 12, 16). In the olive sector, respondents said that the most important changes were those related to the new programme of the MAWRF to intensify olive planting and open new markets to promote the Tunisian product (Interviewees 1, 11).

As for the changes that took place in the agricultural sector after the revolution of 2011, there is a consensus that the revolution has caused disruptions and a great lack of state control, such as controls on digging wells which has a negative impact on the depletion of groundwater, non-payment of bills by citizens and delay of the authorities responsible for repairing the damage.

2.3 Framing Agriculture- and Water-related Policy Challenges and Priorities

The survey highlighted that the agricultural sector in Tunisia is experiencing a number of problems. Some of them are structural, while others are more operational and related to policies and laws, production and governance, labour force, deteriorating security conditions and the resulting theft and corruption.

In terms of *structural problems*, respondents emphasized in particular issues related to the distribution of land and the shrinking of the size of agricultural lands, especially in the sector of cereals, as the areas cultivated for barley dropped from over a million hectares in the mid-1990s to 600 thousand in the period 2010–2015 (Interviewees 4, 18).

Water scarcity and distribution, especially in the central and southern regions, were among the most important problems in the sector mentioned by interviewed stakeholders. The respondents stressed the centrality of the issue of water in agriculture, especially in the cereals and in irrigated agriculture. One respondent from a water association focused on water prices and the problems of non-payment of bills (Interviewee 13). The issue of water not only concerns agriculture but also drinking water. The representative of the same association expressed the material and technical reasons (old or broken canals) that cause the water leakage (Interviewee 13). Some institutional stakeholders (Interviewees 11, 19, 21) raised the importance of dam maintenance to solve the water problem.

Most of the interviewees highlighted the lack of workforce in the agriculture sector, especially young people, despite the high rates of unemployment in rural areas for both men and women. Among mentioned reasons for the reluctance of young people to work in the agriculture sector are the fragility of the sector and its seasonality, coupled with poor wages and hard work (Interviewees 7, 10, 20, 22).

Other structural problems that were exposed by the respondents include:

- Climate change and its impact on water scarcity and desertification as well as the reduction of forest areas due to fires. In addition to climatic and environmental factors, excessive land use and excessive use of irrigation are factors that influence the quality of agricultural land (Interviewees 1, 4, 14).
- Poor research programmes that support product quality (Interviewee 4).
- Depletion of fish resources (Interviewees 4, 16).
- Lack of associations that defend the interests of peasants, especially small farmers, and the lack of organizational structures to frame farmers' interests (Interviewee 11).

Among the problems related to the *agricultural production system*, respondents highlighted the following issues:

- Excessive exploitation of productive capacity (Interviewee 6).
- Weakness in responding to diseases and agricultural disasters. These diseases affect all sectors, and especially livestock (Interviewee 17).
- High cost of production, due to high price of agricultural inputs of fertilizers, pesticides and seeds for propagation and preparation of nurseries (Interviewee 1).
- Weakness in manufacturing industries in the agriculture sector (Interviewee 23).
- Too many mediators and speculation in agricultural products as well as corruption in the distribution routes, which lead to higher prices when selling to the consumer and low margins of profit for the farmer (Interviewees 2, 7).
- Some respondents, especially in the fishing sector, pointed out the weakness of public and private investment, which leads to the non-use of modern techniques and equipment, especially in sectors that require costly investment such as fishing (Interviewees 5, 12).
- Poor maintenance in all areas. For example, maintenance of dams has been mentioned in the water management sector and the maintenance of ports and vessels for sea fishing (Interviewee 2).

Problems related to *governance* include, according to a stakeholder, the lack of organization of professional structures and the representation of small farmers and peasants, especially the poorest ones; mismanagement of the agricultural sector; poor exploitation and misuse of state resources and property; urban crawl, which has also reduced agricultural areas as well as the proportion of rural population and the subsequent emergence of new urban behaviours, which lead to the absence of workers in the agricultural sector; and the lack of control frameworks, which gives opportunities to speculators and monopolists (interviewee 9).

The absence /and or lack of policies and laws was one of the points that all respondents focused on in all sectors; they mentioned particularly the use of outdated and inefficient strategies and policies; the deficiency of restructuring programmes as well as research programmes; and the lack of national policies and strategies for the promotion of agricultural products.

Eighty percent of respondents also focused on agricultural commodity pricing policies and policies aimed at supporting small farmers, creating agricultural land and rationalizing consumption, especially for irrigation and fertilizers. Three trends can be considered: modernization of the agricultural sector through reliance on modern technologies and the employment of new agricultural technologies; participation of farmers in the formulation of agricultural policies; and diversification of the economy in agricultural activity (Interviewee 10).

A respondent (Interviewee 3) also stressed the *insecurity problems* and *corruption*. He stressed the personal attacks on farmers and the danger of terrorism in some localities. These attacks also include theft of products, theft of livestock and the outbreak of fires. Livestock theft is one of the main obstacles to animal farming. During the first nine months of 2017, 555 cases of theft were registered. Therefore, the head of the Tunisian Farmers' Union asked for agricultural security to protect farmers and their products.

The most important *institutional obstacles* that contribute to the aggravation of problems and the difficulty of reform are structural obstacles such as the multiplicity of departments of the MAWRF and the necessity to update the different legal frameworks, especially concerning agricultural associations (Interviewee 14). The lack of technical capacities on the side of farmers and the poor state logistical support to farmers are also among the factors mentioned (Interviewee 16). However, interviewees (Interviewees 14, 23) insisted on the necessity to have accurate quantitative data and other related information to monitor the conditions of production and the achievements of the different national programmes and policies.

2.4 Evaluating the Effectiveness and Potential of EU Trade and Assistance Policies in Agriculture- and Water-related Sectors

The majority of interviewees, particularly civil society stakeholders, have no clear idea about EU–Tunisia cooperation in the agriculture sector. However, they are optimistic about the EU–Tunisia partnership. One of them confirmed that "the sector will know an improvement with the adoption of the national strategy and with establishing a partnership with EU" (Interviewee 1). Another said that "EU–Tunisia cooperation would be successful due to historical relationships and the geographic proximity" (Interviewee 21). Some of them think that the cooperation with the EU is always excellent, particularly after the revolution, through donations and credits (Interviewees 1, 15). They mentioned that the European Union is always the best partner for many reasons (transfer of knowledge, markets, history and so on).

As for the impact on beneficiaries of EU direct programmes in the agriculture sector, a few respondents stated that these programmes have allowed the creation of jobs and women's employment (Interviewees 19, 22). However, these projects will not allow for the protection of workers' rights or improving the working conditions of women (Interviewee 22). The head of an NGO supporting women in agriculture insists that while the EU has supported projects which include a gender dimension, it has not ensured the mainstreaming of the gender dimension during the implementation of projects (Interviewee 24).

In terms of areas of cooperation, respondents are often biased towards the domains related to their activities. Some suggested that many areas could be part of this partnership with the EU (Interviewees 2, 9). The fishing sector is one such area that can be developed on the basis of its added value in exports, as well as its ability to create workplaces and to absorb youth in vocational and technical training (Interviewees 12, 21). Indeed, some respondents praised the ability of the European Union to strengthen cooperation through the transfer of knowledge and training in modern technologies (Interviewees 1, 5, 16).

However, many stakeholders would be reluctant to partner with the EU, seeking to protect the agriculture sector from needing to compete with the European agricultural sector which is benefiting from substantial governmental support (Interviewees 23, 25, 26, 27).

To capture the respondents' views on the European Union, the survey questionnaire included a question about interviewees' opinion on the EU in general, and another question on the partnership with the EU in the field of agriculture. The answers differed on assessment of partnership with the European Union, where some considered that this partnership is very distinctive or good but can be improved (Interviewees 23, 27). Some others considered this partnership to be almost non-existent or less than the expectations. They mentioned that such partnership is weak, especially as regards the environment, forestry, water, fishing and training (Interviewees 13, 21, 23).

These assessments may be based on the high expectations of some groups regarding post-revolutionary European support. The visits of European officials, their support to the revolution and their commitment to accompany Tunisia in the democratic transition led many to consider that the actual support of the Union has fallen short of such promises, and to demand bolder projects (Interviewees 24, 26). Some have argued that although the EU remains an important partner, this partnership is not fair (Interviewees 11, 23, 27). They insist on the fairness of the economic exchange as a determinant for a constructive relationship with the EU (Interviewees 6, 25). Fair partnership was among the concerns of one of the respondents, who said that "it must be a fair partnership, and justice means that the exchange is equal and takes into account the interests of each country and there is a development charter that allows investment in competencies and improvement of the production apparatus" (Interviewee 26).

This was confirmed by a stakeholder who has experienced working with EU support in organizing workshops to debate issues related to agriculture. However, this respondent insists on the need to go beyond certain psychological barriers. He mentioned that the current economic and political situation is disadvantaging Tunisia in its negotiations with the EU since the country is facing a grave macroeconomic situation. He suggested building alliances with the civil society in Europe to counter the pressure groups opposing the interests of Tunisia in the EU (Interviewee 23).

The respondents' view of the idea of "the Mediterranean as a commercial and cultural exchange space" was positive, considering the Mediterranean as a natural geographical space despite cultural differences in the Mediterranean area, and seeing that the EU has the ability to transform the Mediterranean space to be a free zone of trade. However, some questioned the large inequalities between countries. A respondent said, "It is very important, but it should be an open space to be mutually beneficial" (Interviewee 12).

On the ability of the European Union to push the countries surrounding the Mediterranean to build a free trading zone, the answers were all positive, but with some nuances. A respondent declared that "it is possible and logical because of the historical partnership between the various Mediterranean countries and because of its advantage as a regional power" (Interviewee 9).

Conclusion

The survey highlighted the most important problems facing the agriculture sector, the related manufacturing industries and the water sector. Although respondents' assessment of the situation in these sectors was qualified as difficult or very difficult, the interviews showed that there are measures to find solutions to these problems even if they are partial. Some of the problems resulting from the structure of the agricultural sector in general, and the MAWRF in particular, are impeding the research of policy solutions. Improving the partnership among the stakeholders, especially between NGOs and the Ministry, is very important at the present time. Therefore, a solution to the legal framework of the water-related associations and cooperatives to make their participation efficient is very urgent.

It is worth noting that many of the respondents are still optimistic about the possibility of reforming the sector and improving it despite all the problems and obstacles. They see in the Mediterranean space an opportunity that may contribute to restructuring the agricultural sector if there is political will, a more equitable exchange and a bold approach to thinking and planning for cooperation.

Although the EU's current contribution and support to the agricultural sector is not seen as important, the respondents see the EU as a possible partner in terms of direct support through financial support and transfer of knowledge as well as an important player in promoting Tunisian agricultural products in the Euro-Mediterranean space, provided that trade rules and economic relations are made fair.

In sum, according to the interviewed stakeholders, major policy recommendations to the EU are:

- The EU–Tunisia partnership should identify what actions would really help Tunisia to secure jobs, especially for young graduates and inland regions;
- Technology transfer and a deep scientific cooperation could foster a better quality of Tunisian products;
- Orientation towards an agro-ecological model could help develop an agriculture adapted to changing climatic conditions and scarcity of water, aimed at feeding the Tunisian population in large part; and,
- Such partnership should not allow arbitration tribunals to challenge the sovereignty of the Tunisian state vis-à-vis interests of foreign multinationals.

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Annex 1: Institutional Framework and Main Stakeholders Involved in Policy-Making

Governmental Stakeholders

The *Ministry of Agriculture, Water Resources and Fisheries* (MAWRF) is the institution that has the authority to frame and implement policies in the agriculture sector. Its main units are the Department for International Cooperation, the Department of Sea Fisheries, the regional delegations and a unit for Rural Women. It oversees a number of specialized institutions. Public agricultural education institutions and research centres are also attached to this ministry.

The Ministry dates back to before independence (1956). According to the decree No. 419/2001 (13 February 2001) the Ministry's mandate is:

- Preparing agricultural development plans within the framework of national plans for economic and social development;
- Preparation of sectorial programmes for the development of agriculture and fishing;
- Preparing studies on various elements and means to develop the agricultural sector;
- Preparing draft legislative and regulatory texts for the promotion of agriculture and ensuring its application;
- Preparing plans and programmes for harnessing and using water resources to meet the needs of the country and for the development of non-conventional water resources and water economy;
- Completion of works related to the infrastructure concerned with the agricultural water, monitoring its disposal, conserving water and soil, creating natural ponds and preserving agricultural lands;
- Completion of studies and actions aimed at the modernization and revitalization of agricultural structures;
- To ensure coordination of the rehabilitation of agricultural structures and the structuring of international lands and follow-up their completion in cooperation with the Ministry of State Property and Real Estate Affairs;
- To ensure the expansion of the network of agricultural products markets throughout the national territory in cooperation with the concerned parties;
- Participating in strengthening the country's foreign markets, and in searching for new markets;
- Supervision of programmes and works for agricultural revival in the region;
- Supervising the realization of research programmes and ensuring the development of cooperation and scientific exchange with the competent international or regional institutions within the scope of the legislation in force; and
- Supervising the institutions contributing to carrying out tasks within the scope of the Ministry's responsibilities related to the development of the agricultural sector.

The main units of the Ministry are:

- *Department for International Cooperation*: Responsible for following up the external relations of the Ministry, especially in the framework of organizing and participating in international exhibitions.
- *Department of Sea Fisheries*: Responsible for participating in the formulation and application of public fishing policy.

- *Regional Delegations*: Implementation of the state policy and follow-up. It plays the role of mediator between the sector and the Ministry, as well as coordination between the various regional agendas of the Ministry (forests, fishing, etc.).
- *Responsible for Rural Women*: Responsible for programmes directed at rural women working in the agricultural sector.

Furthermore, the Ministry oversees a number of institutions:

Public Lands Office (Office des Terre Domaniales, OTD), which is a public enterprise created in 1961. It manages an area of 156 thousand hectares spread over 30 agro-combines and agro-industrial units. The main tasks assigned to the OTD revolve around the following axes: management of the public lands made available to it; diversification of agricultural production and the introduction of new farming techniques; and participation in the national effort to promote agricultural exports including olive oil, vegetables, wines and citrus fruits.
See official website: http://www.otd.nat.tn

Cereals Office was created in 1962. Its main tasks are the country's supply of local and imported cereals, the organization and regulation of the cereals market, and the creation and safeguarding of strategic stocks of cereals and seeds.

National Office of Oil (Office National de l'Huile, ONH), created in 1962 as a public institution of an industrial and commercial nature. Under Decree Law No. 7013 of 16 October 1970, its legal form has evolved into an inter-professional public establishment of an industrial and commercial nature under the supervision of the MAWRF. Its main missions are: coaching and support of olive growers to improve productivity, promoting the quality of Tunisian olive oil, export development and valorization, the regulation of the internal market and the importation of vegetable oils.
See official website: http://www.onh.com.tn

National Water Distribution Utility (Société Nationale d'Exploitation et de Distribution des Eaux, SONEDE) is a non-administrative public entity that ensures the supply of drinking water throughout the Tunisian territory. Created by the Law No. 68-22 of 2 July 1968, it is placed under the tutelage of the MAWRF. Its main mission is the production and distribution of drinking water throughout Tunisia. It is thus responsible for the operation and maintenance of collection facilities as well as treatment and distribution of drinking water.
See official website: http://www.sonede.com.tn

Company for the Exploitation of Northern Waters' Channel and Conveyors (Société d'Exploitation du Canal et des Adductions des Eaux du Nord, SECADENORD) is a public establishment of an industrial and commercial nature, endowed with civil personality and financial autonomy. It is under the supervision of the MAWRF. The purpose of SECADENORD is to ensure the operation, management, maintenance and upkeep of the canal and water supply pipes used for the transport of water from the Sidi Salem, Ichkeul and the Far North to the locations where it is used and intended to allow the best use of the waters of the North. It distributes and sells the water to the various public organizations responsible for distributing it to end users.

Tunisian Poultry Farming Company (Société Tunisienne d'Aviculture, SOTAVI) is a public corporation of category "A", established in 1981 under the MAWRF. It also has the status of

a public limited company and is subject to the commercial companies' code. Its capital is estimated at 5,460,000 dinars. The current public contribution in the capital of the company is equal to 20 per cent. This contribution will reach 40 per cent after the company's forthcoming listing on the stock exchange. Well-known for its traditions in the poultry industry in Tunisia, the main activity of SOTAVI is the production of hatching eggs and marketing broiler and layer type day-old chicks. Its breeding farms are equipped with the latest technologies in order to ensure the best conditions for the production of hatching eggs meant to produce day-old chicks in its two hatcheries located in the Borj Cedria region. With its skilled and well-supervised human resources and with a large portion of the national broiler and layer type breeders import quota, SOTAVI is one of the pioneers of the poultry industry in Tunisia. In 2011, SOTAVI produced 5,153,000 day-old broiler chicks and 2,033,000 day-old layer chicks, representing 6 per cent and 35 per cent of national production, respectively. Aware of its customers' expectations, SOTAVI has introduced a high-quality programme aiming at producing a high-quality chick. Since it deals with advanced activity, SOTAVI continuously tries to follow technical and scientific development by updating the qualifications and the skills of its staff through the organization of workshops and in-house training sessions.
See official website: http://www.sotavi.com.tn

Agency of Harbours and Fishing Facilities (Agence des Ports et des Installations de Pêche, APIP) was created by Law No. 92-32 on 7 April 1992. It is a public establishment with an industrial and commercial character endowed with a financial autonomy. This agency acts as a merchant in its relations with third parties; it is governed by commercial legislation with the exception of rules related to bankruptcy and judicial settlement.
See official website: http://www.apip.nat.tn

National Plant Protection Company (Société Nationale de la Protection des Végétaux, SONAPROV) is a public company, created by Law No. 69-14 in February 1969. It acts in the treatment and combating of crop pests.

North West Development Sylvo-Pastoral Office (Office du Développement Sylvo-Pastoral du Nord-Ouest, ODESYPANO) is a non-administrative public entity with civil legal personality and financial autonomy. It was created by Law No. 81-17 of 9 March 1981, in order to promote sustainable development in the northwest areas (mountainous areas of the five northwest governorates: Beja, Jendouba, Kef, Siliana and Bizerte).
See official website: http://www.odesypano.agrinet.tn

Office of Livestock and Pasture (Office de l'Elevage et des Paturages, OEP) is a non-administrative public entity. OEP is responsible for the development and promotion of the livestock and pasture sector and plays a role as adviser and technical reference for the public authorities.
See official website: http://www.oep.nat.tn/index.php/en

Agricultural Land Agency (Agence Foncière Agricole, AFA), created in 1977, is the only public body authorized to carry out land redevelopment operations in agricultural areas.
See official website: http://www.afa.nat.tn

Agricultural Investment Promotion Agency (Agence de Promotion des Investissements Agricoles, APIA) is a non-administrative public entity established in 1983, whose main mission

is the promotion of private investment in agriculture, fisheries and related services, as well as the activities of the former transformation integrated into agricultural and fisheries projects.
See official website: http://www.apia.com.tn

National Foundation for the Improvement of the Horses Breed (Fondation Nationale d'Amélioration de la Race Chevaline, FNARC) is a public institution created in 1988 by Law No. 82-88 of 11 July 1988. The Foundation is in charge, under the supervision of the MAWRF, of ensuring the following missions: supervising and encouragement of breeders; identification, realization and follow-up of actions for genetic improvement; elaboration, implementation and follow-up of programmes for development of equine breeding; maintaining database of racehorse pedigrees; organization, control and follow-up of public breeding; participation in the development of equestrian sports and equestrian tourism; representation of the sector in national and international organizations.
See official website: http://fnarc.tn/?lang=en

Local NGOs, Civil Society and Grassroots Organizations, Trade Unions and Employers' Associations

NGOs and Associations

Tunisian Association for the Development of Artisanal Fishing (Association Tunisienne pour le Developpement de la Pêche Artisanale, ATDEPA) is a non-profit development association. It was created on 24 September 2011. ATDEPA aims to improve the sustainable livelihoods of targeted artisanal fishing communities while respecting the ecosystems they exploit, as well as contributing to the improvement of the positive integration of these communities in the dynamics that affect them directly, especially fisheries management and coastal zone development. Its members are from the fisheries administration, scientific research and artisanal fishermen.
See official website: http://artisanalfishing.org.tn

Tunisian Association of Agricultural Engineers (Association Tunisienne des Ingénieurs Agronomes, ATIA) is an association dedicated to all agricultural engineers of various generations and their specialities. A development association founded on 6 April 2011 in order to defend the profession of agricultural engineers, it also aims to establish a statute for this profession and to promote the professional status of agricultural engineers and their integration into the professional environment and in the development of enterprises and institutions. The Association also contributes to the development of the agricultural sector while preserving the environment, as well as the development of rural families and the rationalization of the consumption of water and energy resources with the call to promote sustainable development.
See official website: http://www.utia.tn

Tunisian Association for Agricultural and Rural Development (Association Tunisienne de Développement Agricole et Rural, ATUDAR), founded in 2011, is the association working on mentoring and guiding small farmers in rural areas, linking them to the local and central authorities, and working on the efficient exploitation of agricultural resources.

Tunisian Association for the Evaluation of Agricultural Land, founded in 2011, works on awareness of the value of agricultural lands, forming a link between them and the supervisory authority.

Association for the Protection of Jemna's Oasis (APJO), founded on 20 February 2011 in Jemna (a village in the south of Tunisia). Its mission is the exploitation and management of agricultural lands (palm forests) in the area of Jemna.

Water Associations, there are 1,443 water associations. Their role is to provide rural communities with drinking water and to provide irrigated areas with irrigation water. Since the 1970s, these water associations have been non-governmental organizations run by a team of 5 to 7 volunteer members of the rural population (MAWRF 2018c).

Syndicates and Unions

Tunisian Union of Agriculture and Fisheries (Union Tunisienne de l'Agriculture et de la Pêche, UTAP) is the oldest agriculture syndicate, born in 1949. It is the most important NGO acting in the sector. It has for decades been the only professional structure representing farmers in Tunisia. In addition to the structures at the central level, the UTAP has regional structures covering all the governorates. Since 2015 it has led the National Dialogue for Agriculture. The axes of this dialogue are: the national and international market and distribution channels; foreign trade policies and free trade negotiations; natural resources; land issues; production systems; renovation and technology transfer; investments and funding; governance of the agricultural sector; and employment.
See official website (in Arabic): http://www.utap.org.tn

Tunisian Farmers' Union (Syndicat des Agriculteurs de Tunisie, SYNAGRI) is an agriculture syndicate founded in 2011 by 200 farmers, to overcome the crisis experienced by UTAP at that moment. Mr Leïth Ben Becher, chairman of the constitutive committee of the Union, justified the creation of this new structure by "the crisis of a real representativity of the agricultural sector in Tunisia and a blurred perception of the future for farmers".[7]
See official website: http://www.synagri-tunisie.org

Private Organizations

There are around 1,900 companies representing 18.5 per cent of the industrial fabric (199 full export companies and 166 foreign-invested companies) and employing more than 71,000 people (companies employing 10 or more people). With more than one hundred export destinations, the main markets remain those of the European Union (Italy, France and Spain) and Libya. New destinations are emerging such as the United States, Canada, Russia, Japan, the Middle East and sub-Saharan Africa (Niger, Senegal and Côte d'Ivoire). The major companies in the three important sectors of dates, oil and canned food are:

7 "SYNAGRI, le nouveau syndicat des agriculteurs en Tunisie", in *Espace Manager*, 10 February 2012, https://www.espacemanager.com/synagri-le-nouveau-syndicat-des-agriculteurs-en-tunisie.html.

Horchani Dattes is the foremost private grower of dates in Tunisia. It has been one of the leaders in date exports since 1930 (about 3,500 tons of dates every year). Half the crop is the Deglet Nour date cultivar. Horchani Dattes is a family-owned and managed enterprise with the largest plantation of date palms in the Tunisian Sahara, located in the valley of Saba Abar, in the heart of Djerid Oasis. It engages in organic agriculture based on a selection of the best date palms of Deglet Nour varieties certified by ECOCERT (French certifying organization). Currently the volume of organic date export is 440 tons.
See official website:http://www.horchani-dattes.com

Al Jazira Olive Oil: owned by the Ben Achour Family since 1925, the company produces many kinds of packaged olive oil products such as extra virgin olive oil and organic olive oil. It won first prize for the best olive oil product packaged in 2015.
See official website: http://www.oliveoiltunisia.com

Société Industrielle des Conserves Alimentaires (SICAM) is a limited company with a capital of 32,200,000 dinars and a brand belonging to the Bayahi Group, among the leading Tunisian economic actors with multiple international activities. SICAM is the leading producer of tomatoes, harissa and jam in Tunisia.
See official website: http://www.sicam-tunisia.com

Research Centres

National Observatory of Agriculture (Observatoire National de l'Agriculture, ONAGRI) is a public administrative institution under the supervision of the MAWRF. ONAGRI was created by Decree No. 308 of 1 February 1999. It is charged to accomplish the following missions: establish a reliable information system to analyse the situation of the agriculture and fisheries sector at the national and international levels through relevant, reliable and periodic indicators; collect, analyse and process national and international information and data related to the agriculture and fisheries sector; disseminate information and data collected; and make it available to various stakeholders such as policy-makers, planners, researchers, producers, exporters and others.
See official website: http://www.onagri.nat.tn

National Centre for Agricultural Studies (Centre National d'Études Agricoles, CNEA), created in 1974, is a public corporation whose first vocation is agricultural engineering in all its aspects. The CNEA enjoys a civil personality and financial autonomy which confer upon it the attributes of a private consulting engineer with national and international reach. Pioneer and leader of Tunisian agricultural engineering, the CNEA has benefitted from European research departments thanks to the transfer of knowledge and technologies resulting from its establishment by FAO and the World Bank.
See official website: http://www.cnea.nat.tn

Institution of Agricultural Research and Higher Education (Institution de la Recherche et de l'Enseignement Supérieur Agricoles, IRESA) is a public institution with an administrative character endowed with civil personality and financial autonomy, created by Law 90-72 of 30 July 1990.
See official website: http://iresa.agrinet.tn

Local Branches/Offices of European/Global NGOs and IOs

Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ): has been working in Tunisia since 1975 and set up an office in Tunis in 1999. It offers its support to Tunisian partners at the national, regional or municipal level. It cooperates with actors in the public sector, civil society and the private sector. In order to be more visible in the regions, GIZ has opened project offices in the capital Tunis as well as in Béja, Kairouan, Sidi Bouzid and Sfax. It supports Tunisia in four sectors, with particular emphasis on the development of rural areas: sustainable management of natural resources; renewable energy and energy efficiency; sustainable economic development and employment; and regional development, local governance and democracy.
See official website: https://www.giz.de/en/worldwide/326.html

Food and Agriculture Organization (FAO): is a UN organization that works on the following areas in Tunisia: "Support in the improvement of the agricultural sector's performance with a focus on improving the agriculture systems management; Sustainable management of natural resources through the introduction of good agricultural practices; Strengthening of political and institutional aspects in support of the agricultural sector and the vulnerable populations".
See official website: http://www.fao.org/countryprofiles/index/en/?iso3=TUN

Delegation of the European Union to Tunisia: within the framework of ENPARD, is the organ through which the EU supports Tunisia, particularly through innovative pilot actions in several Tunisian regions (EU Delegation to Tunisia 2017a).
See official website: https://eeas.europa.eu/delegations/tunisia_en

Annex 2: List of Interviewees

Interviewee 1. Institution (international cooperation), male representative, 18 July 2017, Tunis, by Hatem Chakroun

Interviewee 2. Institution (fisheries), male representative, 20 July 2017, Tunis, by Mohamed Lachigar

Interviewee 3. Regional institution, male representative, 22 August 2017, Béja, by Hatem Chakroun

Interviewee 4. Regional institution, male representative, 18 July 2017, Nabeul, Mohamed Lachigar

Interviewee 5. CSO, male representative, 1 November 2017, Tunis, Hatem Chakroun

Interviewee 6. CSO, male representative, 2 November 2017, Tunis, Hatem Chakroun

Interviewee 7. CSO, male representative, 4 November 2017, Tunis, Hatem Chakroun

Interviewee 8. CSO, male representative, 4 November 2017, by phone, Hatem Chakroun

Interviewee 9. Regional institution, female representative, 6 September 2017, Bizerte, by Mohamed Lachigar

Interviewee 10. Regional institution, male representative, 6 September 2017, Bizerte, by Hatem Chakroun

Interviewee 11. Regional institution, female representative, 6 September 2017, Bizerte, by Mohamed Lachigar

Interviewee 12. Regional institution, male representative, 13 September 2017, Zarzis, by Hatem Chakroun

Interviewee 13. CSO, male representative, 16 September 2017, Tunis, by Hatem Chakroun

Interviewee 14. Farmers' union, female representative, 16 September 2017, Tunis, by Mohamed Lachigar

Interviewee 15. Institution (investment), male representative, 20 October 2017, Tunis, by Mohamed Lachigar

Interviewee 16. Farmers' union, male representative, 23 October 2017, Tunis, by Mohamed Lachigar

Interviewee 17. Farmers' union, male representative, 28 October 2017, Tunis, by Mohamed Lachigar

Interviewee 18. CSO, male representative, 29 October 2017, Tunis, by Hatem Chakroun

Interviewee 19. Institution (rural women), female representative, 20 November 2017, Tunis, by Mohamed Lachigar

Interviewee 20. Institution (rural women), female representative, 9 January 2018, Tunis, by Mohamed Lachigar

Interviewee 21. Institution (forestry sector), male representative, 9 January 2018, Ben Arous, by Mohamed Lachigar

Interviewee 22. CSO, female representative, 8 March 2018, Tunis, by Hatem Chakroun

Interviewee 23. Farmers' union, male representative, 28 April 2018, Tunis, by Hafedh Chékir and Asma Nouira

Interviewee 24. CSO, male representative, 5 May 2018, Tunis, by Hatem Chakroun

Interviewee 25. CSO, male representative, 7 May 2018, Tunis, by Hatem Chakroun

Interviewee 26. Civil society activist, male representative, 8 May 2018, Tunis, by Hatem Chakroun

Interviewee 27. CSO, male representative, 11 May 2018, Tunis, by Hafedh Chékir and Asma Nouira

Annex 3: Questionnaire

Context

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

Challenges

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

Policies in the agriculture and water sectors in Tunisia

13. How do you assess European policies in the Mediterranean and in Tunisia in the field of agricultural trade liberalization and cooperation and water with regard to (1) the major problems and needs in the agriculture and water sectors, (2) the issues the EU has focused on, (3) the actors involved (i.e., who was included and who was excluded), and (4) the methods used?
    a) Which actors, methods and issues would you consider most relevant, necessary and appropriate?
    b) What do you think is the impact of these policies from the perspective of people's welfare and local economies' needs (e.g., labour rights, small farmers versus big farmers, marginalized regions versus wealthy regions)?

14. How do you assess the potential of EU policies in light of the policies which other important regional and external powers are driving in terms of rural and agricultural development in their country (including the US, Turkey, Saudi Arabia, Iran, China and Russia as well as international institutions such as the World Bank, the Gulf development funds, and so on)?
   a) Are their policies conflicting, competing or converging with the EU's? What should be the EU's policies in this respect?
15. Have EU-funded development projects been allocated equitably across regions and actors (i.e., the most deprived region receiving the largest funds? the needy and small farmers being targeted)?
   a) Were these projects associated with generating good quality jobs?

MED RESET

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