

Further Development of Organic Farming Policy in Europe with Particular Emphasis on EU Enlargement QLK5-2002-00917

**D7: Report on the development of political institutions
involved in policy elaboration in organic farming
for selected European states**

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List of Abbreviations

BSE	Bovine spongiform encephalopathy
CAP	Common Agricultural Policy
COPA	Committee of agricultural organisations in the European Union
GMO	Genetically modified organisms
IFOAM	International Federation of Organic Agriculture Movements
NGO	Non-governmental organisation

Country codes

AT	Austria
CH	Switzerland
CZ	Czech Republic
DE	Germany
DK	Denmark
EE	Estonia
EN	England
HU	Hungary
IT	Italy
PL	Poland
SI	Slovenia
UK	United Kingdom

AT Austria

AGES	Agency for health and food safety
AMA	Austrian agricultural market
ARGE	Working committee for the promotion of organic agriculture
Biolandbau	
BOKU	University of Natural Resources and Applied Life Sciences
IFÖL	Institute for Organic Farming
LBI	Ludwig Boltzmann Institute
ÖIG	Austrian association for the interests of organic agriculture
PRÄKO	Austrian conference of the presidents of the agricultural chambers

CH Switzerland

BAG	Federal Office of Public Health
BLW	Federal Office for Agriculture
FiBL	Research Institute of Organic Agriculture
SBV	Swiss Farmers' Union
SQS	Swiss association for quality and management systems
VSBLO	Association of Swiss organic farming organisations

CZ Czech Republic

KEZ	Inspection of organic farming
PRO BIO	Association of organic farmers
REC	Regional ecological centres
VUZE	Research institute of agricultural economics

DE	Germany	
	AGÖL	Working group on organic agriculture
	AoeL	Working group of Organic Food Producers
	BLE	Federal Agency for Agriculture and Food
	BNN	German Association for Natural Food and Products
	BÖL	Federal Programme for Organic Farming
	BÖLW	Federation of the Organic Food Industry
	DBV	German Farmers' Union
	DLG	German Agricultural Society
	FAL	Federal Agricultural Research Centre
DK	Denmark	
	DARCOF	Danish Research Centre for Organic Farming
	DO	Danish association for organic farming (merger of LOJ and OLC)
	LOJ	Danish Association for Organic Farming
	OAC	Organic agriculture council (old name for OFC)
	OFC	Organic food council
	OLC	National organic centre
EE	Estonia	
	CEET	Centre for Ecological Engineering
	EBA	Estonian Biodynamic Association
	EOFF	Estonian Organic Farming Foundation
	MoA	Ministry of Agriculture
	SEEB	South Eastern Estonian Bios
HU	Hungary	
	AHOF	Association of Hungarian Organic Farmers
	AMC	Hungarian Collective Agricultural Marketing Centre
	ARI-HAS	Agricultural Research Institute of the Hungarian Academy of Sciences
	BA	Biokultúra Alliance
	CRIS	Crop Research Institute in Szeged
	DAEM	Department for Agri-environment Management
	FOC	Foundation for Organic Culture
	HEG	Hungary Eco Guarantee
	MARD	Ministry of Agriculture and Rural Development
	TESZ	Organic Producers' Sales Association
IT	Italy	
	AIAB	Italian Association for Organic Farming
	AMAB	Mediterranean Association for Organic Farming
	FIAO	Italian Federation for Organic Agriculture
	GRAB-IT	Research Group on Organic Agriculture - Italy
PL	Poland	
	IJHAR-S	Inspection service of agri-food product quality
	PCBC	Polish centre for inspection and certification
	JCPE - PNG	Organic Production Certification Unit PNG

PTRE Polish association of organic farming

SI Slovenia

AJDA Demeter association Slovenia
CAF Chamber of agriculture and forestry
CPMG Centre for development of small business
ISD Institute for sustainable development
MoA Ministry of agriculture
USOFA Union of Slovenian organic farmers' associations

UK United Kingdom (England)

DEFRA Department for Environment, Food and Rural Affairs
IOR Initiative on Organic Research
MAFF Ministry of Agriculture, Fisheries and Food
NFU National Farmers' Union

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1. Introduction

Organic farming can be seen as a concern of a social movement representing an alternative to mainstream agriculture (Michelsen *et al.* 2001). As a result of being in opposition to mainstream agricultural policy, in past decades organic farming in Europe developed independently of the established agricultural institutions. There was, and often still is, close contact with organisations outside the agricultural sector, highlighting its character as a social movement in opposition to traditional agricultural institutions. As a consequence, the organic movement developed its own private services (extension, market development support, information, training, inspection and certification) and quality assurance systems with private standards defining organic agriculture. This situation changed completely in the late 1980s and early 1990s with i) the introduction by the EU of organic farming support schemes, ii) EU regulation of organic farming (Reg. EEC No 2092/91) and iii) increasing involvement of state authorities in organic farming issues (e.g. training, education, advice, information). As a result, after years of being in opposition to mainstream agriculture, organic farming became an instrument of agricultural policy (Dabbert *et al.* 2004). Moreover, this situation now requires the organic movement to establish its own political structures for interacting both with public authorities and with the mainstream farming community (Stolze 2003).

Against this background, this report will identify and evaluate the development of political institutions involved in elaborating and coordinating policy relating to organic farming. We therefore analyse the institutional development of organic farming in eleven European countries (AT, DK, CH, DE, IT, UK, CZ, EE, HU, PL, SI) covering the period from 1997 to 2003. The aim is to examine the capacity of existing national policy processes and actors to successfully implement institutional reforms. The underlying assumption is that successful and comprehensive development of the organic sector, i.e. growth in the number of organic farms and further development of organic markets and policy can only take place if institutions exhibit enough dynamism. Thus, on the one hand, we need institutions (as policy processes and actors) to be established and, on the other hand, these institutions must be able and willing to change themselves or to initiate change.

The concept for analysing the political institutions relevant to organic farming was first introduced in the research carried out by Michelsen *et al.* (2001) as part of the EU Project FAIR3 CT96-1794 “Effects of the CAP Reform and possible further developments on organic farming in the EU”. Analysing six European countries (AT, BE, DK, GR, IT and UK) in the period from 1985 to 1997, Michelsen *et al.* (2001) identified a path of six steps *facilitating* organic farming growth. Accepting that local conditions are essential for local development, Michelsen *et al.* (2001) suggested that the six steps form a general pattern for organic farming development. The first three steps had been completed in all of the countries studied from 1985 to 1997; the three complementary steps had only been completed in some of them. The intention of the current research work presented in this report is therefore

- to test the main findings of Michelsen *et al.* (2001) on the broader empirical basis of eleven European countries. The analysis will be carried out on three groups of countries:
 1. the new EU Member States CZ, EE, HU, PL, SI
 2. countries with an average organic farming sector DE, IT, UK, and
 3. countries with a large organic farming sector AT, DK, CH

- to compare the institutional development analysed in this report for the 1997-2003 period with the situation in 1985-1997 analysed by Michelsen *et al.* (2001).

In view of the above aims, Michelsen *et al.* (2001) provide the basis for the present research work with regard to i) the methodological approach used, and ii) hypothesis generation.

The report is structured in three parts. First of all, we briefly describe the methodological approach adopted. Subsequently, in Chapter 3, we analyse the institutional changes that have taken place in the eleven case-study countries in the various domains of farming (organic farming community, food market, agricultural policy), as well as changes in the institutional setting. The findings are then presented for the three groups of countries described above.

Finally, we draw conclusions on the basis of the hypotheses generated, and complement these by formulating recommendations for the successful development of organic farming institutions.

2. Methodology

2.1 The methodological basis

As this report on the development of political institutions involved in organic farming policy elaboration builds on the earlier research work carried out by Michelsen *et al.* (2001), we will briefly introduce the methodological concept used by them. For a more comprehensive description of the concept of political institutions, see Michelsen *et al.* (2001) and Michelsen (2002).

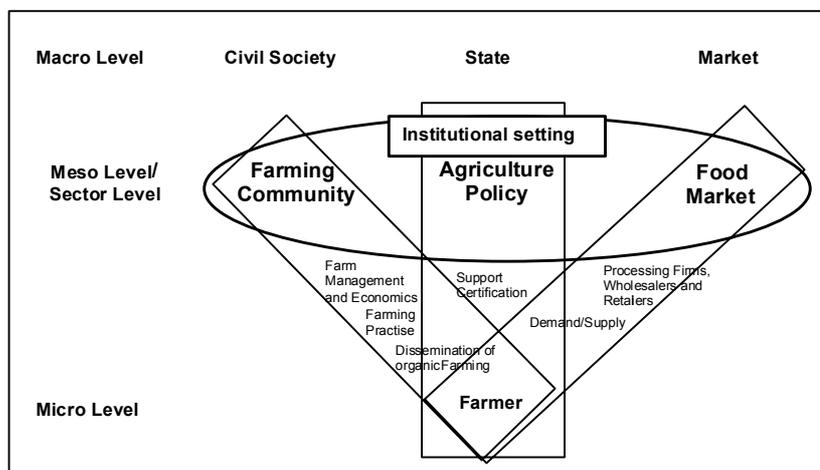
The analysis of political institutions relevant to organic farming is based on two theoretical concepts:

- a) the concept of institutions playing an essential role in the policy process
- b) the concept of societal domains in which institutions operate.

Here, an **institution** is considered to be a coherent system of norms, rules, customs and habits shared collectively and enforced on individuals by the collective it refers to. The main idea is that institutions involve groups, that institutions affect the behaviour of each individual member of the group in a stable manner over time, and that institutions are based on shared values. In relation to organic farming, institutions are usually manifested in some kind of organisation (Michelsen *et al.* 2001).

Following Michelsen *et al.* (2001), we will look at institutions in different **societal domains** (figure 1):

Figure 1: Interrelationship between farmers and the institutional environment



Source: Michelsen *et al.* 2001

I. farming community:

- the organic farming community includes private/semi-public organisations, associations, certification bodies, extension and research services, etc. which work exclusively with organic farming issues
- the general farming community involves all private/semi-public organisations, associations and other forms of cooperation working in the interests of farmers and which in some way take a stance/act with regard to organic farming, such as general agricultural organisations

(farmers' unions), advisory systems and extension services, combined organic/general agricultural organisations or forms of cooperation, etc.

II. food market:

market driving forces, organic organisations, processing/distribution, retail (organisations), general food organisations and business companies

III. agricultural policy:

organic certification and inspection, general political environment, policy action.

Furthermore, the **institutional setting** is the domain in which interrelationships between these three domains take place, e.g. farmers' cooperatives, which play an important role not only in the food market (domain), but also have strong interrelationships with farmers' unions (hence, the farming community domain).

Michelsen (2002) describes three types of interrelationships between organic farming and general agricultural institutions: pure cooperation, pure conflict and creative conflict.

Pure cooperation is a situation where cooperation between the two parties is so comprehensive and all-encompassing that the fundamental conflict inherent in organic farming's criticism of mainstream farming is avoided and deliberately toned down to such an extent that the difference between the two seems almost to disappear. The reasons for avoiding or toning down conflicts can be i) the conviction that organic farming more or less equals existing types of farming or ii) that organic farmers are not that different from other farmers. In such a case it is very difficult to maintain the distinctiveness of organic farming – its identity may wither away – and one can expect to find only a few, comparatively weak organisations exclusively promoting the ideas and interests of organic farming. Instead, one can expect to find the main proponents of organic farming inside mainstream agricultural institutions. Pure cooperation is not expected to foster continuing and substantial dissemination of organic farming – except in a situation where organic farming is perceived to be the way forward for the whole of the national agricultural sector.

The other extreme type of interrelationship is *pure competition*. This type of interrelationship is characterised by only occasional direct contact, or none at all, between organic farming institutions and those of the general agricultural sector because they see each other not as farmer colleagues, but as competitors or opponents in the food market, in public opinion, and as regards public support for agriculture. In all domains, pure competition may create an atmosphere in which attempts are made to suppress the interests and arguments of the adversary without any serious effort to exchange views. Pure competition presupposes the existence of independent organic farming organisations. Competition will be open if the organic farming organisations are strong enough to be considered a real organisational obstacle to the general agricultural organisations. If the organic farming organisations are weaker, the general agricultural organisations may neglect them. The pure competition interrelationship may be expected to hamper the development of the weaker party and hence have a negative impact on organic farming growth.

Creative conflict is the type of interrelationship that lies between competition and cooperation. Here, organic and general agricultural institutions are in continuous contact, cooperating on some issues and competing in others. Creative conflict may thus involve a climate of both competition and mutual respect, with both parties perceiving that they have some – though not all – interests in common. This type of interrelationship presupposes the existence of distinct organic farming organisations.

Creative conflict, furthermore, may be expected to help promote the development of organic farming by keeping organic farming issues on the agenda of the farming community, the food market and agriculture policy as well as in society at large, whilst maintaining the integrity of the core principles within a pragmatic framework. This conflict should be perceived as creative, not only for organic farming, but also for mainstream agriculture, for instance by enhancing the ability of general agricultural institutions to develop environmentally friendly agriculture and to serve new groups of farmers.

The three types of interrelationships are based on theory and represent three positions on a scale. Therefore real-world interrelationships may combine elements of two of the positions and hence be positioned somewhere in between (Michelsen, 2002). This explains why, in the analysis, we talk about cooperation and competition rather than pure cooperation and pure competition.

2.2 Empirical basis and data collection process

Scientific information on the development of organic farming institutions as a sound basis for institutional analysis can be found in the research work carried out within the EU Project “Effects of the CAP Reform and possible further developments on organic farming in the EU” and some subsequent publications (Lampkin *et al.* 1999; Michelsen *et al.* 2001; Michelsen 2002; Padel and Michelsen *et al.* 2001), as well as in a few articles (Lynggaard 2001; Michelsen 2001; Padel 2001; Greer 2002). Apart from these sources, scientific information is scarce, especially at country level. However, useful information can be found in the grey literature, including the minutes of general assembly meetings of organic farming organisations or articles in non-scientific journals, and publications of administrative reviews and parliamentary commissions, for example. Due to this situation, and in order to take the varying availability of data in the case-study countries into account, a two-step approach was proposed. Data collection is therefore based on

1. a literature review carried out in each case-study country, including both academic and grey literature, and
2. personal interviews with key informants to complement the information gathered in step one.

As the subject requires country-specific expertise and native language skills, both the literature review and the key informant interviews were conducted by local experts and partners respectively. In each case-study country, three to seven interviews were conducted with key informants. Key informants worked in the areas of organic farming research, organic farming associations, environmental organisations, retail, political parties, extension and administration.

To ensure comparability of data on the one hand and respect the country-specific differences in data availability on the other, a list of guiding questions was provided (see Annex III). Each local expert and partner computed data gathered from the literature review and the key informant interviews in a pre-structured country report. These country reports form the basis for the analysis, which was carried out centrally by the authors with particular assistance from the local experts and partners provided during a step-wise feedback process.

Though expecting considerable national variation, we form three groups of countries to reduce the complexity of the information. This forms the basis for policy recommendations that are sensitive to the major discrepancies between countries.

3. Institutional changes in different domains of society

On the basis of six case-studies, Michelsen *et al.* (2001) studied the institutional changes in the agricultural environment between 1985 and 1997 and the impact these changes had on organic farming growth. They concluded that there was a path comprising six steps leading to successful organic farming growth:

- Step 1. The establishment of an organic farming sector with a formal framework for organic farming.
- Step 2. The political recognition of organic farming through recognising organic standards
- Step 3. The introduction of financial support to organic farmers.
- Step 4. The development of non-competitive interrelationships between organic farming and the general farming community through the establishment of *fora*.
- Step 5. The development of functioning organic food markets governed by market mechanisms.
- Step 6. The establishment of an institutional setting committed to promoting organic farming.

Michelsen *et al.* (2001) stress that, as a first step, the idea of organic farming based on a social movement needs to move from informal interest groups to a formalised community that lays down a definition of organic farming, and thus establishes a clear identity of its own. In the case of Greece, for example, the identity of organic farming seems to be imposed on Greek agriculture by foreign forces (EU, foreign enterprises) rather than by national interest groups. In view of the fact that the importance of the Greek organic farming sector remains modest, with 0.7% of all farmers running their farm organically (Lampkin 2004), external triggers could be ineffective for organic growth if the national foundations are weak or lacking altogether. Conversely, there could also be a situation in which a strong national organic farming community loses its identity as a consequence of increasing state adoption of original areas of the organic farming movement (e.g. private standards vs. Reg. EEC No 2092/91, state-financed training and advice, public information campaigns). These considerations are the basis for our first hypothesis to be tested in the case-study countries:

Hypothesis 1:

Building up an organic farming identity is essential.

- a) External (to a country or to the organic farming sector) pressure to initiate an organic farming sector or to change it significantly cannot lead to institutional development and organic farming growth if the organic farming community is lacking identity.
- b) State intervention may cause a loss of organic farming identity.

With step 2 and step 3, Michelsen *et al.* (2001) emphasise the role of the state for organic farming development. Political recognition of organic farming is not an end in itself but expresses the fact that the state has identified in organic farming a means to solving problems. Indeed, organic farming has become a policy instrument for reducing surplus and for its positive agri-environmental impacts. Analogously,

recognition in the other two societal domains, the farming community and the food market, requires organic farming to be a real option or a real alternative. So, organic farming may offer economic prospects e.g. for farmers in marginal areas. As far as the food market is concerned, organic products may represent a niche within a competitive market that could yield above-average growth rates. In more general terms, therefore, recognition in all societal domains is important for organic farming growth.

Hypothesis 2: Organic farming has to be recognised as a realistic option in all domains of society.

The concept of *creative conflict* comprises the notion that conflicts are perceived as creative not only for organic farming, but also for mainstream agriculture. Thus, following hypothesis 2, organic farming needs to be recognised as a real option, for instance in enhancing the ability of general agricultural institutions to develop environmentally friendly agriculture and to serve new groups of farmers. However, in addition to this, we see a second requirement which needs to be fulfilled. *Creative conflict* requires the organic and the mainstream farming community to be in a position where engaging in debate is possible. This means that we need a consensus within the community in question that allows for interaction, and that there are no barriers that make interaction impossible.

Hypothesis 3: For organic farming growth, a climate for debate has to be created that allows for an exchange of views among all actors involved in agricultural policy and other relevant policy fields.

- a) The interrelationship within the organic farming community has to be one of cooperation.
- b) The interrelationship between the general and the organic farming community has to be non-competitive, i.e. cooperation or creative conflict

In all six case-studies, Michelsen *et al.* (2001) found major problems in balancing the efforts directed towards the three societal domains. This resulted in the formulation of *Step 6*, namely that the establishment of an institutional setting based on organic farming views but including mainstream interests is an important tool for organic farming development. With Hypothesis 4, we test a more precise formulation of *Step 6*. Thus, the purpose of an institutional setting is not only as a platform bringing together the interests of the three societal domains. The institutional setting additionally needs to take responsibility for coordinating activities and thus help facilitate adaptation to changing conditions.

Hypothesis 4: For the development of organic farming, an institutional setting is needed.

- a) It has to coordinate activities among the different domains.
- b) It can act as a facilitator for the adaptation of the organic sector to changing conditions

The definition of three initial steps to establish an organic sector and three complementary steps to facilitate successful growth of organic farming (Michelsen *et al.* 2001) suggests testing, in Hypothesis 5, whether it is true that the larger the sector the more steps have been completed, taking sector size as a measure of organic farming growth.

Hypothesis 5: The larger the organic farming sector, the more steps on the path towards successful establishment of the organic farming sector have been completed.

Completion of steps 1 to 3 (establishment of an organic community, political recognition, financial support for organic farmers) forms the basis for organic farming growth.

Steps 4 to 6 (positive involvement of general farmers' organisations, development of a proper organic food market, establishment of an institutional setting) are additional factors.

Michelsen *et al.* (2001) see the six-step-path as a circle providing the possibility of reflecting on the development that institutions have undergone so far, rather than as a one-way trajectory. Conditions resulting from the initial round of six steps can eventually be improved by taking one or more of the steps again. This leads us to our last hypothesis, namely that larger organic sectors might have undertaken individual steps more than once.

Hypothesis 6: In countries with a larger organic sector, the steps have been undertaken more than once.

In the subsequent part of the report, we test the 6 hypotheses on the basis of the empirical data collected in the eleven case-study countries. The information gathered will be presented in accordance with the structure of the three societal domains. Thus, we first of all analyse the three domains separately before studying the institutional setting.

As the intention of this report is to evaluate institutional development rather than to provide a historical overview of organic farming development in Europe, we analyse the case-study countries within three country groups. The underlying assumption is that similarities between countries facilitate identification of the main factors responsible for a particular development. Analysing data by groups of countries poses the risk of a) losing country-specific details and b) focusing primarily on finding similarities, with the result that other factors and connections might get lost. While we are aware of this problem, we see advantages in presenting the information by groups of countries: it makes the amount of data much more manageable by reducing complexity, thus facilitating illustration of the main factors relating to both differences and similarities by contrasting country information within one country group. We consider three criteria for the selection of the country groups:

First of all, we have countries whose political system developed differently after the Second World War – the western European countries and the eastern European countries (the new EU member states).

Second, we can see from Table 3-1 that we have differences in the organic farming sector size. The overall approach of this study is based on the concept of organic farming as a social movement. Whether or not the organic farming sector will grow within agriculture depends on the decision of individual farmers. Thus, the share of organic farmers is the measure that should be chosen, rather than the share of agricultural land managed according to organic farming principles. With AT, DK and CH, we have countries that in 1997 and in 2002 show a relatively higher level in the size of the organic sector in terms of the share of organic farms compared to the situation found in DE, UK and IT. The new member states, on the other hand, started from a very low level in 1997 as regards the share of organic farms.

Third, we can refer to the conclusions of Michelsen *et al.* (2001), who explain the size of the organic sector in terms of the level of institutional change. This shows the capacity to adapt to changing conditions that growth brings about. AT and DK both appear in the same group of countries with the largest institutional changes of all and IT and UK in the group with institutional changes of a smaller scope.

**Table 3-1: Organic sector size in selected European countries 2002
(share of organic farms as a % of all farms)**

Country	Code	share of organic farms (% of all farms)	
		1997	2002
Austria	AT	10.0	9.3
Denmark	DK	2.8	6.4
Switzerland	CH	5.3	8.1
Germany	DE	1.7	3.3
Italy	IT	1.4	2.3
United Kingdom	UK	0.4	1.7
Czech Republic	CZ	0.5	1.9
Estonia	EE	0.2	1.5
Hungary	HU	N.D.	2.5
Poland	PL	N.D.	0.1
Slovenia	SI	N.D.	1.3

Source: Prazan et al. 2004; Lampkin 2004

Here, therefore, we take AT, DK and CH as a group of countries representing a large organic farming sector in a rather small country with a western European background. DK and AT have already been the subject of research in Michelsen *et al.* (2001) and we can thus compare their current situation with that in the period 1985-1997. The second group of countries we look at consists of DE, IT and the UK, which also have a western European background. In these three countries, however, the organic sector is smaller in size than in the first group. Furthermore, DE, IT and UK in general represent i) the larger European countries and ii) countries with a federal system in which agricultural policy is an important issue of the regions or *Länder* respectively. Again, in this country group, UK and IT represent two countries that have already been investigated by Michelsen *et al.* (2001). For the UK review we focus on England (EN), as agricultural and organic farming policy is now fully decentralised and EN includes the majority of UK organic farmers and is the largest political unit.

Finally, the new EU member states CZ, HU, PL, SI, EE form the last group of countries.

Furthermore, if we look at the steps undertaken by the countries along the lines of Michelsen's path for successful organic farming development, we see that AT and DK may be considered to have undertaken all six steps. Both IT and the UK, on the other hand, emerge as having completed steps one to three, while steps four and five have been only partly achieved and step six was not undertaken till 1999. Thus, apart from the parameter size of the organic sector, the steps undertaken on the path of organic farming development indicate that AT and DK should be placed in one group and IT and UK in another.

On the whole, we are aware that even though there are arguments for the grouping of countries, these groups will not be homogeneous in all respects. Different institutions in different domains will be developed to a different level.

Below, we will now present the information gathered in the case-study countries by three country groups. The three country group chapters follow the same structure: We start with a short overview and consider whether there are questions relating to that group that must be addressed specifically. After this, we focus on the institutional changes in the three societal domains and within the institutional setting. Finally, we draw initial conclusions for each country group.

The sequence of country groups follows their expected progression on the path towards successful development of organic farming. The first group, therefore, is that of the new EU member states, followed by the group of countries with an average-sized organic farming sector. The last group presented consists of countries with a large organic farming sector, which are expected to have undertaken the most steps compared to the other countries.

4. The new member states: CZ, EE, HU, PL, SI

A common characteristic of the new EU member states is that their history of organic farming is rather short. Although a number of smallish social movements may be observed in some countries before 1990, the process of EU accession pushed the development of organic farming forward. Similarly, the importance of external influence from the EU with its regulations was reported for Greece in an earlier study on institutional development of the organic farming sector (Michelsen *et al.*, 2001). It may be asked whether the development of the organic sector in the accession countries shows parallels to the development in Greece. Referring to the hypotheses underlying this report, we can therefore ask whether

1. the first three steps for successful organic farming growth have been completed in these countries?
2. the organic farming community is weak and has not yet developed a sound identity?
3. interrelationships with the general farming community are close to pure cooperation?
4. an institutional setting in support of organic farming is lacking?

In what follows we will focus on these hypotheses, while bearing in mind the basic hypotheses established in the introductory section of this report. The size of the organic farming sector differs within this group, ranging from CZ, where the share of organic farms is close to the European average, to countries with only a very small share of organic farms (see Table 3-1). We will seek to answer whether these differences in size in the accession countries are the result of different patterns of development of organic farming institutions, and ascertain the reasons for such differences.

4.1 Institutional changes within the farming community

4.1.1 Organic farming associations and their interrelationships

The organic farming community is characterised as being rather small but growing in EU accession countries. No institutions of the organic farming community are reported to have disappeared in the period 1997-2003. Coherence within the community varies from country to country.

In EE, the only state-wide active organic farming organisation, the Estonian Biodynamic Association (EBA), was founded as far back as 1989 and since then it has been the main driving force behind organic farming development. It is not limited to biodynamic agriculture, however, but works on organic farming in general. In the mid-nineties other institutions joined in, but an important new phase of organic farming development started in 1997 with the implementation of the Organic Farming Act. From 1997 on, more organic farming organisations were established, acting on a local to regional level. The local organisations are mostly led by members of the EBA, so they cannot count as fully independent organisations. Moreover, South Eastern Estonian Bios (SEEB) has been working independently at regional level since 1997. In 1994, the Centre for Ecological Engineering (CEET) started organic farming activities (projects, trainings, consultations etc.). From 1996, CEET has published a quarterly organic farming magazine. In 2000, the Estonian Organic Farming Foundation (EOFF) launched training and advisory activities, as well as research and

lobbying. It should be noted that even though the organic farming sector is growing, the number of farmers that are members of an organic farming organisation is not increasing. It is reported that fewer than 20% of all organic farmers were members of an organisation. This indicates that private organisations in Estonia have lost their importance as a result of the involvement of state organisations in inspection and certification from 2001 on.

In PL, we find small organic farming associations scattered over the country, and a range of inspection and certification bodies have developed in recent years. No umbrella organisation developed in the period 1997-2003. The oldest organic farming association, EKOLAND, was founded as far back as 1989, but the biggest one was PTRE, which was created in 1993. Other organic farming associations were founded in 2001 at a more regional level, such as BIOGLEBA and EKOGAL. From 1996 on, EKOLAND concentrated more on activities of an organic farming association and outsourced inspection and certification activities, but its logo is still used for labelling, due to its relatively wide recognition among organic consumers. Several private inspection and certification bodies have developed in the interim: first, AGRO BIO TEST and Bioekspert; then in 2002, EKOGRACJA PTRE (developed out of the farmers' organisation PTRE), COBICO and JCPE-PNG appeared on the private side and, as a state-owned institution, the Polish Centre for Inspection and Certification (PCBC) became involved in organic farming certification. Many organisations operating at regional or local level are working quite autonomously and interaction with other organisations tends to be rare.

On the one side we can observe one organic farming association, EKOLAND, changing from a pioneer operating in all fields to a more specialised organisation that focuses on advice and lobbying by renouncing its inspection and inspection activities. On the other side, the organic farming community is still in its initial stages, characterised by a proliferation of institutions that are spread throughout the country, and the organic farming community still lacks unity. However, in 1998, the "Coalition to Support the Development of Organic Farming" was established, bringing together organisations with an environmentalist background working in the fields of education, advice, certification and social activity. Not all of the organic farming associations mentioned above are members, but the Coalition is reputed to play a certain role as an umbrella organisation.

A different picture can be drawn for CZ, HU and SI. In these three countries, the organic farming community seems more unified, with SI showing a more dynamic situation at the institutional level.

In CZ, the main period of the development of organic farming organisations was before 1997. From 1990-1992, financial support for organic farming was already available and important individuals worked on the development of organic farming institutions. The organic farmers' association PRO-BIO was founded in 1990. In 1999, the inspection body KEZ was founded and accredited by IFOAM in 2003. From 1999 on, several Regional Ecological Centres (RECs) were established, primarily with the aim of lobbying and improving the framework conditions for organic farming (e.g. consumers' awareness, availability of organic food). Moreover, other recently established initiatives (such as Camphill) aim at promoting organic farming at local level. All in all, only modest development of organic farming organisations can be observed for the period 1997-2003. Internal conflicts within the organic farming community were not reported; it seems that PRO BIO has been able to maintain its good position vis-à-vis the Agricultural Ministry and is accepted as the organisation that represents the organic farming community in the country.

In HU, too, the main steps for the development of organic farming took place prior to the period 1997-2003. The first organic farming association, Biokultura, was established in 1987 and comprised not only organic farmers, but also the processing and trade sectors. In 1995, HU was included in the EU's so-called list of third countries, implying formal acknowledgement of the Hungarian organic inspection system, and in 1996 Biokontroll Hungaria Kht. (BKH) was established. Until then the most important inspection body in operation was the Dutch company SKAL, which stopped its activities in HU in 2000. Recent development of organic farming organisations started in 2000 with the foundation of a second organic farmers' association, the Association of Hungarian Organic Farmers (AHOF), which focuses on larger organic farms. A further inspection body, Hungary Eco Guarantee (HEG), started operating in 2002. In 2003, the umbrella organisation Biokultura Alliance (BA) was established with the aim of enhancing representation of organic farming at national level. It groups both regional Biokultura associations and the AHOF, as well as organisations for trade, training, research and advice. In the course of establishing BA, the earlier Biokultura was reorganised and independent regional organisations are now trying to improve local activities. In addition to these developments with regard to professional organisations, the Foundation for Organic Culture (FOC) was established in 2001 with the principal aim of conducting information and dissemination activities for organic farming. Even though the establishment of two additional organisations (AHOF and HEG) points to a certain level of internal conflict within the organic farming community, no major divergence is reported. BA includes both AHOF and the old Biokultura associations, and some personal linkages between the organisations are also reported.

In SI, the first two organic farmers' associations were created in 1997, adopting existing private standards, and this represents the beginning of the organic farming sector there. However, a strong movement among organic gardeners had already started back in the mid-eighties and this had influenced the development of the organic sector. In 1999, the Union of Slovenian Organic Farmers' associations (USOFA) was founded, actually combining eight regional organic farmers' organisations. It is recognised by the Ministry of Agriculture as one of the stakeholders to consider as regards specific agriculture-related topics (with a focus on rural development and agri-environmental issues). The second umbrella organisation is AJDA, grouping seven regional biodynamic organisations, although only a small proportion of their members are farmers. It was founded in 2002. In the course of the development of the organic sector, some conflicts occurred among organic farming associations. AJDA has retained its own (biodynamic) standards and logo. Although the two organisations compete in terms of financial support from the state, their relations are reported to have improved.

4.1.2 Institutional changes in research, training and advice

Research, training and advice activities for organic farming are integrated into mainstream institutions in all accession countries to different extents. NGOs play an important role in training farmers and raising consumer awareness; they are active at regional level in particular. All in all, not many changes in this part of the organic farming community are reported for the years 1997 to 2003.

While in CZ the state institute VUZE (Research Institute for Agricultural Economics) has created a small section dedicated to organic farming research, in EE a few mainstream research institutions deal with organic farming at a low level. In SI, the two agricultural faculties in Maribor and Ljubljana have become active in organic research, although to a very limited extent. In addition, since 1996, the independent

ISD (Institute for Sustainable Development) has been working in organic farming research. In PL, agricultural universities carry out research on the organic farming sector to various extents. Besides universities, research institutes such as the Institute of Soil Science and Plant Cultivation provide research in organic farming. In HU, mainstream agricultural research institutes such as the Martonvásár Agricultural Research Institute of the Hungarian Academy of Science (ARI-HAS) and the Crop Research Institute in Szeged (CRIS) have begun to show an interest in organic farming, but no specialised research institute has so far been founded. However, the Training Research and Advisory Association for Organic Farming, established recently, could coordinate research needs and mediate between farmers and researchers.

Organic farming has been integrated into teaching programmes in the educational system (universities and middle schools) in CZ in only a few cases; the share among vocational colleges is still small. In EE, organic farmers are trained mostly by CEET and the EOFF, and also by EBA and regional organic farming organisations. Training of advisors is provided by the Centre for Ecological Engineering (CEET) and the EOFF. Mainstream institutions are not involved at all and the educational system is fully segregated. In SI, besides the ISD, it is mostly regional organic farmers' associations that train farmers. Of considerable importance is the activity of the agricultural advisory service, part of the mainstream Chamber for Agriculture and Forestry (CAF) that offers basic training courses in organic farming. Aside from training of farmers, a variety of organisations at regional level aim at raising consumers' awareness of organic farming. In PL in the 90s, an organic farming teaching programme was established and implemented in several secondary agriculture schools, thus teaching some of the basics of organic farming at different levels. The universities of Lublin and Olsztyn offer various courses in organic farming both at BSc and MSc level, and Warsaw Agricultural University is planning to launch an MSc programme in organic farming in 2005. In HU, various universities have integrated environmental management and organic farming into their curricula since the mid-1990s. At the Institute of Environment and Landscape Management, Szent Istvan University, the MSc programme qualifying students as "agronomists specialised in environmental management and organic farming" has been available since 2003. There are organisations (e.g. FOC) aiming to provide information and disseminate organic farming ideas at the general level, but also at a technical level (e.g. the Kishantos organic demonstration and rural development research and education centre). In addition, some (mainstream) Chambers for Agriculture at county level are reported to be active in training and advice.

Advice is integrated into mainstream institutions to a relatively small extent. In CZ, the Ministry of Agriculture has set up a support programme for advisory groups and also offers special seminars for farmers in organic farming, and in SI some agricultural institutes owned by CAF and co-financed by the state engage in providing advice to a certain extent. Full integration of the organic farming advisory system into the mainstream can be observed in EE. There are nearly no purely organic advisors and they are often part of the general farmers' union and members of the Estonian advisors' association. Due to the fact that organic advisors are trained by organic farming institutions such as CEET and EOFF, however, they maintain a close relationship with the organic farming sector. In PL, the situation is similar, with advice on organic farming being part of the state extension service. Many advisors gained experience with organic farming while following courses provided by the organic farmers' association (EKOLAND). There are some state extension service units that cooperate to a certain extent with OF associations and together organise continuous training for farmers, and occasionally conferences on organic farming. As

stated above, in HU some mainstream county-level Chambers for Agriculture have integrated organic farming advice into their services. In addition, advice is provided by the organic farming organisations.

4.1.3 Interrelationships between organic and mainstream farming: cooperation or conflict?

In all accession countries, the organic farming community is still very small. Institutions are beginning to define their positions vis-à-vis the general farming sector. The state acknowledges organic farming institutions to different extents and the interrelationships between organic and general farming institutions also vary among the countries.

All in all, interrelationships with general agricultural institutions can be described as rather controversial. In all of the countries, the organic farming sector is reported to be so small that it is hardly considered a serious player in agricultural policy by private mainstream institutions. Nevertheless, in CZ the general farmers' union is starting to integrate organic farming into its structures and activities to some extent and one person has been given responsibility for organic farming. Furthermore, both farming communities are working together with regard to the EU: they have agreed on sending a representative of PRO-BIO to meetings of COPA (Committee of Agricultural Organisations in the European Union) when organic farming issues are discussed there. In HU, overall relations between the mainstream and the organic farming community are characterised by a lack of contact. Only the National Association and Product Council for Seed has created a separate section for organic seeds. Furthermore, the yearly national Seed Conference has taken up organic farming issues in recent years.

Initially, SI underwent a phase of conflict between general and organic farming organisations, fostered by a sense of distrust towards institutions of the pre-transformation period. Since 2000, relations have improved and organic farming is beginning to be recognised by general farming institutions (and the state).

With regard to acceptance by the state, one can observe more sophisticated formal acceptance of organic farming in SI, CZ and PL where, in addition, some joint activities of state and private institutions take place at regional level. The Estonian state accepts organic farming to some extent, but its attitude seems somewhat variable. After asking some individuals belonging to the organic farming movement to prepare an initial proposal for an Organic Farming Action Plan, the proposal submitted was not pursued further. In HU, state activities that integrate the organic farming community take place at regional level by some county-level Chambers for Agriculture. In SI, the CAF, which is closely connected to the state, has created a committee on organic farming on the initiative of USOFA. In CZ, in the discussion process on the Action Plan, the organic farming associations proved their ability to influence politics. In PL, representatives of organic farming participate in the work of the Council on Organic Farming at the Ministry of Agriculture and Rural Development. No such official platform for integrating the organic farming community is reported for HU. Interest of the state in organic farming in accession countries is related to the requirements of the EU accession process and adoption of regulations. Therefore, a problem often mentioned by experts is the low level of the state's commitment to organic farming.

4.1.4 Summary of the institutional changes in the farming community

In the accession countries, the organic farming community has been able to develop a community based on a common understanding of standards. A common organic farming identity has been established at different levels corresponding to the differences in size of the organic farming sector. It is most highly developed in CZ and HU (which have the highest shares and strongest growth of organic farming of the accession countries), and weaker in countries with a larger number of different organic farming organisations. All in all, the organic farming community in accession countries is still quite small, and therefore acceptance by mainstream policy-makers is hampered. This is especially true when the organic farming sector is diverse and scattered over the country, as is the case in PL. This country also shows the smallest share of organic farms of all the countries in this group. With regard to the general lack of contact between the organic and general farming community, the situation can best be described as competition. With regard to the advisory system, we can find more integration into mainstream institutions and, consequently, the situation here is more one of cooperation. In countries with an umbrella organisation or one dominant organisation, the organic farming community manages to be recognised by the state to some extent and a basis for contact is created. Examples are (to some extent) EE, SI and CZ. In HU, an umbrella organisation has just recently been established and a formal basis for contact with the state has not yet been found.

4.2 Institutional changes within the food market

In the accession countries, there are not many institutions involved in the organic food market. There seems to be considerable potential for change and development, but so far this domain is described as being in its infancy. Even though it does not apply to the same extent for all the countries studied, the organic food market in accession countries is mainly described by the following characteristics: small sector size and, accordingly, low supply of organic raw products, high share of direct marketing, geographical dispersion of farms, low level of organised distribution channels. CZ should be pointed out as an exception here, as supermarkets in CZ hold a 50% share in sales of organic products.

Supermarkets are beginning to play a role in CZ, SI, PL and HU, but this sales channel is reported to be inhibited by the characteristics mentioned above. The longest-standing involvement of a supermarket chain in the organic food market is recorded in CZ, where Ahold became active (pushed by the vigorous commitment of one person) in 1999. In the period that followed, more supermarkets became interested in organic products. In SI, supermarkets became involved in the sale of domestic organic products in 2003, powered by a marketing initiative developed by CPMG (Centre for development of small business), MoA (Ministry of Agriculture), USOFA and CAF in cooperation with the biggest supermarket chain in SI, Mercator. Likewise in 2003, the TESCO supermarket chain started to sell organic products in PL. No detailed examples can be given for HU, but experts point to the increasing involvement of supermarkets in selling organic products in recent years. In EE, only a few supermarkets in the capital sell some organic products, but all in all this sales channel is of no importance for organic farmers, who mostly sell their produce directly. In addition, an important share of organic produce in EE is sold as conventional through mainstream market channels.

Other mainstream institutions of the food market integrate organic products only at a low level. No integration is reported from market organisations, but on the other hand, independent organic organisations are developing only slowly and mostly at

the local to regional level. In PL, there is currently one export company, Symbio Ltd., that specialises in organic products. In CZ and HU, a segregated channel is furthest developed. In CZ, a section for organic food retailers was established under the umbrella of PRO-BIO. They share promotion, standards and purchase of raw materials and products, and maintain joint international relations. In HU the AHOF, among others, coordinates marketing information and has been active in market observation since 2000. In 2002 and 2003, respectively, two organisations were established in the organic food market domain: the specifically organic TESZ (Organic Producers' Sales Association), which markets organic vegetables and fruit, and the Trade Association for Hungarian Organic Products, integrating trade at all levels.

As the characteristics of the organic sector in the accession countries inhibit successful marketing initiatives at national level, as described above, actions taken focus mostly on the local or regional level, or products are exported (HU). On the private side, regional market cooperatives have been created in CZ, whereas in PL, state authorities from two provinces began to engage in marketing initiatives in 2001 and 2002. Here, state and private organisations (public bodies, university, environmental groups, organic farmers' organisation and others) are working together to develop the regional market for organic food. No ongoing influence of market initiatives is reported for EE. The implementation of the new Organic Farming Act in 2001 mainly aimed at facilitating exports of organic products into the EU. The organic producers' union was founded for this purpose in 2000, but slowed down its activity from 2003 on. Exports into the EU are reported only for the years 2001 and 2002. In 2003, organic meat producers established the Estonian Organic Meat Cooperative in order to organise organic meat processing and marketing, initially in the local Estonian market, but also with the longer-term aim of reaching the EU market. In HU, exports are said to play the predominant role for the marketing of organic products, and 80-90% of Hungarian organic products are exported. Export of organic products has been providing the basis for organic farming development in this country since the mid-1990s.

A state-wide marketing approach is reported in SI and HU. In SI, two marketing initiatives that were not originally focused on organic products have had an important influence on the sector. In 2000, a national programme for developing high quality labels resulted in the private BIODAR label for organic products. In 2003, a state project was launched to create market channels for high quality products from Slovenian farmers and has ended up focusing primarily on organic products. This shift in focus is reported to have been influenced greatly by the activity of USOFA. In HU, the AMC (Hungarian Collective Agricultural Marketing Centre, situated in the MARD) has been showing its interest in organic farming since 2000. In this year, a special marketing programme for organic products was set up, but the financial basis is quite low and therefore experts estimate the effect of the programme to be rather modest. In 2003, AMC initiated a uniform Hungarian organic trade label, although this has not yet been implemented. The Department for Rural Development in the same Ministry also supports the development and marketing of organic products.

4.2.1 Summary of the institutional changes in the organic food market

In the accession countries, the organic food market is at an early stage of development, with some supermarkets only beginning to engage in the marketing of organic products. Local and regional initiatives (state marketing initiatives as well as private cooperatives) are currently playing a more important role in most of these

countries. Where an organic food market has been established at all, we find a situation of incipient cooperation, as well as competition between the organic sector and the mainstream. Organic market institutions are only starting to develop. The separated sales channel of direct marketing remains important for organic producers scattered over the country. In HU, most organic products are exported and this export orientation of organic farming is reported to be the primary driving force for organic farming development.

4.3 Institutional changes within agricultural policy

After the collapse of the socialist system in CEE countries, all political institutions changed and a fundamental reorientation of policies took place that affected not only agricultural policy. From 1990, the PHARE programme of the EU became available to these countries, and from 1997 official accession negotiations started in all countries in this group. The Accession Agreements obliged the prospective member countries to adopt the *aquis communautaire* and, as a result, EU Regulation 2078/92 on agri-environmental programmes was implemented. The foundations were thus laid for providing financial support for organic farming. EU Regulation 2092/91 on organic farming was implemented in the accession countries from 2000 on, in some cases replacing earlier national legislation.

4.3.1 The role of changes in general agricultural policy

The accession process influenced agricultural policy in the direction of emphasising multifunctionality and the relationship between agriculture and the environment. Especially for SI, it is reported that public (state) institutions became involved in organic farming policy primarily in response to the reform of national agricultural policy in 1998. In 2000, the Slovenian agri-environmental programme was introduced, which included support for organic farmers from 2001 on; however, support for organic farming as a measure in its own right had already been introduced in 1999. Similarly, in EE, preparation for and implementation of the agri-environment programme, which also includes organic farming support (paid since 2000), has positively influenced organic farming development. In CZ, one of the crucial factors for organic farming development was the fact that in the early nineties, the ministry of agriculture was rather open-minded towards organic farming and the development of the movement could thus be initiated. It is reported that the ministry has become more active again in the past three years. In HU, the driving force for changes in general agricultural policy was the inclusion of the country in the EU list of third countries in 1995. The Department for Agri-environment Management (DAEM) was established in the Ministry of Agriculture and Rural Development (MARD), and from then on was given responsibility for organic farming issues. In 2002, a demonstration farm network was established within the National Agri-environmental Programme in order to show organic farming practice and provide education on organic farming. In PL, the ministry of agriculture became active in organic farming in the late 1990s under pressure from organic farmers' associations. As a result, subsidies for OF were introduced in 1998/1999 and the Organic Farming Act was passed in 2001. From then on, the interest of ministry slowly started to increase.

4.3.2 Changes in organic farming policy

The biggest changes in the policy domain took place when accession countries introduced payments for organic farmers and a regulation on organic farming. Payments were first introduced in CZ from 1990 till 1992, and again from 1998 on. In HU, the first financial support for organic farmers was available in 1997 for conversion and from 2002 onwards for all organic farmers. In SI and PL, payments started in 1999. In EE, organic farmers have been granted financial support since 2000 after the first Organic Farming Act was implemented in 1997. A new Act came into force in 2001 harmonising the Estonian legislation with EU regulation 2092/91. The regulation on organic farming was introduced in HU in 1999, in CZ in 2000 and in SI and PL in 2001. The Slovenian Ministry of Agriculture made the use of a national label for organic products obligatory in 2003, thereby causing some conflict with the private label from USOFA.

In all policy processes, organic farming NGOs played a role in influencing policies.

In HU, no new state bodies emerged that focus exclusively on organic farming. Within the Ministry of Agriculture and Rural Development (MARD), the Department for Agri-environment Management (DAEM) was established, but this institution is concerned with organic farming only as one issue among many. With the AMC, a state marketing body became active in organic farming. However, no working groups or committees for organic farming were established at national level. A parliamentary group for organic farming was active between 1997 and 2002, but they seem not to have had an important effect on organic farming policy making. Experts do not see the organic farming community as having any major influence on Hungarian agricultural policy. Some importance is given to Biokultura's influence on the process of Hungary's application for inclusion on the EU's list of third countries. This organisation is also said to have influenced the initial introduction of payments to organic farmers. Apart from Biokultura, only AHOF, BA and Biokontroll are reckoned to play some role in the political scene, although it is not clear to what extent and no clear evidence of their influence can be provided.

In EE, with the first Organic Farming Act, state bodies began to engage in organic farming inspection and certification. From 2001, with the new Act, the tasks were expanded and the MoA (Ministry of Agriculture) assigned all inspection and certification activities to state bodies. The organic farming committee was established in 1999, involving representatives from the state and CEET, and it carried out advisory work till 2001, mainly on labelling issues. After the implementation of the new certification system, it disappeared. In 2000, the organic farming advisory committee was set up by the MoA, bringing together representatives from the organic farming sector and state bodies dealing with organic farming. From 2002 on, however, its importance waned and its influence is said to have been not very great at all. For the farming organisations, the new Organic Farming Act implemented in 2001 had a significant effect, as that act assigned inspection and certification activities to state authorities. An attempt was also made to develop an organic farming action plan, and the MoA asked some experts to make a proposal. However, the action plan was never fully elaborated and no institutions were involved in the proposal.

In PL, the "Working Group on Organic Farming" was established at the Ministry of Agriculture in 1997, and from then on took an active part in formulating organic farming policies. Via this working group, organic farming associations gained the possibility of influencing policy making at the national level. In 2003, the ministerial "Council of Organic Farming" was established. Due to organic farming law, IJHAR-S

became a supervisory authority for the organic farming certification system. Additionally, one activity of IJHAR-S includes control of labelling at the producers' level. In SI, USOFA managed to establish the "Committee on Organic Farming" within the Chamber of Agriculture in 2002. It had already gained some influence on organic farming-related policy from 2000, when the agri-environmental programme was discussed, and it was consulted regarding the formulation of the state regulation on organic farming and rural development plans. The highest level of integration and acceptance by the state can be seen in CZ. PRO-BIO has been directly involved in the development of the national action plan since 2002, and both the MoA and the MoE are reported to support organic farming.

EU programmes available to accession countries play a significant role for the development of the organic sector. In PL, a PHARE twinning project was implemented in 2002, with the aim of developing institutions in the organic farming sector. One result was the establishment of the "National Centre for Organic Farming Development" in 2003, and experts assert that the programme will have an important impact on the organic farming sector. However, at the time of writing this report, it was not yet possible to evaluate the programme and its overall effects on the sector.

4.3.3 Summary of institutional changes in agricultural policy

In all the accession countries, pre-accession activities play an important role for the development of organic farming institutions. Adopting EU standards also includes the organic farming regulation, and therefore the state plays an important role in all these countries by establishing structures that are compatible with EU law. In response to the EU model of agriculture, general farming policy emphasises multifunctional aspects of agriculture. The ambition of acceding to the EU thus lays the basis for state bodies to engage in organic farming.

During the process of implementing regulations on organic farming in recent years, NGOs have gained influence on national policy in all countries. This influence is estimated to be highest in CZ, where organic farming has been on the agenda of state activities since the early nineties. This could lay the basis for developing creative conflict; however, the organic farming sector is still in its infancy. In cases where the organic farming community is still rather small (PL), the situation is not so clear, but tends more towards competition as contact between the organic and mainstream farming sectors is lacking. EE and SI may be found somewhere in-between, with some efforts being made to establish closer contact with agricultural policy. In HU, too, contact at institutional level between the organic and mainstream farming sectors seems to be lacking, even though the organic farming community is larger than in PL.

4.4 Changes within the institutional setting

As regards the interrelationships within the organic farming community, the accession countries show different patterns. In CZ, institutions cooperate at different levels, from promotion of organic farming in general to joint elaboration of an action plan, and no major conflicts are reported in the period 1997-2003. It is not clear whether this results from the presence of a dominant organic farming organisation, PRO-BIO, that tones down differences with other smaller organisations, or if there is, in fact, strong unity among the organic farming community. In HU the recently established umbrella organisation brings together organic farming associations

(organic and biodynamic), as well as organisations for trading, training and research. Thus, cohesion within the organic farming community is given; however, the umbrella organisation has not yet formulated a policy strategy, so its influence on policy is limited. In EE, organic farming institutions cooperate in a project-focused manner, or on more informal activities such as sharing information and training. It is not reported that any platform has been established which now significantly influences organic farming policy. In PL, regional diversity in organic farming associations is considerable, and interrelationships within the organic farming community in terms of an umbrella organisation do not encompass all organic farming organisations. A similarly heterogeneous organic farming community can be found in SI, where important conflicts appeared before and during the establishment of the umbrella organisation USOFA. AJDA, the biodynamic organisation, espoused different opinions and goals regarding a common label, and this resulted in the disintegration of the earlier cooperation that had existed between organic and biodynamic organisations. In addition, some local conflicts could be observed.

Looking at the external relationships of the organic sector, in CZ, SI, PL and HU, cooperation can be observed between the organic farming community and the state. In EE, initial attempts at cooperation between the state and the organic farming sector, such as the organic farming advisory committee, were unsuccessful. However, there has been cooperation in developing legislation and through different projects between state and private bodies. No far reaching cooperation between mainstream and organic farming institutions is reported in any of these countries. From about 2000 on, in CZ and SI the organic farming organisations demonstrated their ability to approach state bodies on legislative issues (regulation on organic farming, action plan) or promotion of organic farming in general. On the other hand, organic farming organisations were also engaged in disputes with state institutions over financial payments in CZ and a national label in SI. We could therefore describe the interrelations between the organic farming sector and the state as incipient creative conflict, where cooperation is found on some issues, but conflict on others; the limiting factor for real creative conflict may be the fact that the sector remains small in size, as is especially true in the case of SI. In PL, the state became interested in organic farming in 1997, and the relationship between state and organic farming organisations developed further after the passing of the organic farming law in Poland in 2001. From this year on, some state institutions became involved in organic farming, especially in certification. Organic farming organisations approach the state in an attempt at lobbying; however, no concrete results such as, e.g., an action plan, can be reported so far. Interrelations between the organic and mainstream farming communities are described as competitive with some examples of cooperation; mainstream farming organisations only became interested in organic farming after the Council of Organic Farming was established at the Ministry of Agriculture and Rural Development in 2003. In HU, one example of cooperation between the organic farming sector and the state was the elaboration of the organic farming legislation and support scheme in 1999. However, this cooperation was never institutionalised and contact at national level between the organic farming sector and the state seems to be lacking since. Conflicts exist, but the organic farming organisations do not address them or the state does not take them seriously into account. In recent times, some cooperation is reported to be taking place at regional level in the context of rural development programmes. Contact with the mainstream farming sector is sparse. On the other side, examples are given of cooperation between the organic sector and environmental organisations with regard to the debate on GMOs in agriculture.

With regard to the food market, no institutional setting could be established in countries of this group. In SI, as reported in chapter 4.2, one marketing initiative was launched as a result of the efforts of institutions from different domains. However, institutionalisation of this cooperation has not been reported so far. In other countries, an institutional setting may be developing for market issues at regional or local level, but without any consequences for the national level.

An institutional framework for policy issues was set up to some extent in CZ during the process of developing an action plan for organic farming, but as this process has been completed, its future is unclear. In other countries, an institutional setting exists only at a very basic level (SI and PL), or is completely lacking (HU and EE).

4.4.1 Summary of changes within the institutional setting

The development of the institutional setting in accession countries is diverse. Internal relationships within the organic farming community are purely cooperative only in CZ and HU; in EE cooperation is the prevailing type of interrelationship, whereas SI and PL both show some controversy due to differences in opinions on standards details or labels and the large geographical spread, respectively. In all countries, some relations with the state are reported, but not between organic and mainstream farming organisations. The relationship between the organic sector and the state is developing in the direction of creative conflict in CZ. In EE and SI, contact between the state and the organic farming sector is present and observers suggest that there is potential for further development. In PL and HU, state interest in organic farming still seems to be at rather a low level, and contact between the organic farming sector and the state is sparse. As regards market issues, no institutional framework has been established at national level in any of the countries. On policy issues, no institutional setting has been developed so far in EE, HU, PL and SI, but has been established temporarily in CZ in the course of implementation of an action plan.

The accession process is said to be the key event for the development of the organic farming sector in all countries of this group. It resulted in enhancing acceptance of organic farming by state bodies. Only in CZ did a key event have such significant influence on the agricultural policy that it resulted in lasting institutional change for the organic sector, namely when an action plan was set up.

4.5 Summary of the development of the institutional environment

Let us return to the hypotheses focusing on the particular situation of this group of accession countries. It should be remembered here that these hypotheses were derived from findings for the organic sector in Greece in an earlier study.

- 1 Regarding the steps for establishing an organic farming sector as developed by Michelsen *et al.* (2001), we may conclude that in all the accession countries the first three steps have been completed:
 - i) an organic farming community has been established, i.e. we find a definition of organic farming and certification is ensured;
 - ii) political recognition varies across the countries, but it exists formally in terms of a state regulation on organic farming;
 - iii) financial support is granted for organic farming, although the levels of payments vary.

The basis for organic farming growth is thus given.

- 2 When looking at the identity of the organic farming community more closely, we can observe some variety in the accession countries studied. In CZ, EE and HU, relationships within the organic farming community are cooperative, and the community shows a high degree of unity. In SI and PL, the organic farming community is more heterogeneous. Recognition by the state is highest in CZ and clearly lower in the other countries. This suggests that the organic farming community has a strong position vis-à-vis the state and general farming institutions in CZ and a weaker one in HU, EE, SI and PL. However, the organic sector is still developing and such statements should not lead one to forget the overall small size of the sector. In conclusion, we can state that the hypothesis concerning the identity of the organic farming community is at least partly true for most accession countries. CZ and HU are the exceptions, with an organic farming community that appears to have a more highly developed identity.
- 3 From the discussion of the identity of the organic farming community we move to the next hypotheses on the interrelations between the organic and the mainstream farming community. In general, in all of the countries in this group, contact between the two communities is scant or lacking altogether. We are therefore unable to affirm whether the type of interrelationship with mainstream farming institutions is pure cooperation in countries with a small organic sector; rather, we find competition here. We will come back to this result in the concluding chapter when discussing the overall hypotheses established in the introductory part of this report. We will question whether internal forces for the development of an organic farming identity have been strong enough in accession countries to enable differences between the two farming systems to be made clear.
- 4 With regard to the institutional environment, we can conclude that this is possibly starting to develop in CZ where the policy process of elaborating an action plan for organic farming can be seen as an institutionalisation of the influence of the organic farming community. In the other countries, an incipient institutional framework is found in some cases, but is not yet fully established. In conclusion, this hypothesis can be corroborated.

Further conclusions refer to the leading hypotheses of the whole report.

- 5 A proper domestic organic food market has not yet been established in any of the accession countries.
- 6 The role of the state in these countries was one of creating a suitable framework for the development of the organic farming sector in response to requirements of the accession process. This can be seen as the most important trigger event for the development of the organic farming sector. As an exception, the situation in HU should be pointed out. Here, the export orientation of the organic farming sector is said to play a crucial role and may explain the relatively large size of the organic sector in this country, although some shortcomings are reported in other institutional aspects. Deeper intervention in the organic farming sector on the part of the state cannot be reported and this, in turn, is considered positive for the development of the sector. An exception here is possibly EE, where the state has the authority for inspection and certification.
- 7 In terms of organic farming being recognised by society as a realistic option, we can conclude that this recognition is generally lacking in all

countries. Organic farming is rather ignored and accepted in the different domains of society mostly as an option for agriculture to secure income after EU accession. It is seen partly as a way to make use of the money available from EU funds.

- 8 The small size of the organic farming sector is often a limiting factor for its further development. We can conclude that a certain critical mass has to be present to push the development of organic farming forward.

5. Countries with an average-sized organic sector: DE, IT, UK

The countries in this group all show a share of organic farms around the EU average. This share was clearly smaller in 1997, and two of the countries (DE and UK) show extremely strong growth in the share of organic farms from 1997 to 2002. The history of organic farming is older than in the group of the new EU Member States. Two of the countries in this group (IT and UK) were the subject of analysis in the previous study by Michelsen *et al.* (2001).

Table 5-1: The interrelationship between organic farming and mainstream agricultural institutions in IT and UK from the previous study

	Organic farming community	General farming community	Food market	Agricultural policy	Institutional setting	Overall evaluation
IT	competition	competition/cooperation	competition/incipient cooperation	cooperation	cooperation	competition/cooperation
UK	competition	competition	competition/incipient cooperation	cooperation	lacking	pure competition

Source: Michelsen *et al.* (2001)

From the findings and conclusions of the earlier study, it might be interesting to shed light on some country-specific characteristics of the organic farming sector. The hypotheses set out in the introductory part of the report are derived from their study, so it will be interesting to see if any changes have taken place in the institutions of organic farming. It is argued by Michelsen *et al.* (2001) that, as of 1999, IT and UK had not completed all six steps they suggest are required for successful growth of organic farming; the second half of the steps had been undertaken only in part, and the last step, the establishment of an institutional setting, was completely lacking. This situation is the point of departure for some country-specific hypotheses refining the more general ones outlined before or adding where necessary. Has the interrelationship between organic and mainstream farming changed? The German study may serve as a control for the hypotheses developed.

The interrelationship between the organic and general farming community was described as pure competition in UK and one region of IT, and as pure cooperation in another part of IT. Both types are described as stable states that are not likely to bring about change. Therefore, if there has been change or an impulse for development of organic farming in these countries, institutional change must have taken place, bringing with it a change in the institutional interrelationships in the direction of creative conflict. This is one hypothesis that will be tested for this group of countries:

If there has been an impulse for the development of organic farming in IT and UK,

- i) the institutional interrelationship between the organic and the general farming community has changed in the direction of creative conflict, or
- ii) the institutional setting is gaining importance.

For the Italian case, some different regional patterns of organic farming development were evident in the last study and made overall evaluation of the situation extremely difficult. The current study focuses on the national level, however, and regional aspects will thus be omitted. What remains interesting from the previous study of IT is the following question:

Is the level of conflict within the organic farming community decreasing and shifting to cooperation?

With regard to Germany, it should be pointed out that in this report we address the national level. Through the federal structure, the *Länder* (federal states) play an important role in organic farming policy, and thus significantly influence organic farming development. However, our survey did not cover all 16 *Länder* and it must therefore be borne in mind that what is said here is mostly true for the national level, and the situation in some *Länder* may differ. Often, regulations and laws at the level of the *Länder* complement national policy or give it a new focus during implementation.

The UK review only focuses on England (EN), because agricultural and organic farming policy is now fully decentralised, and different systems have evolved compared with the pre-1997 period. EN does, however, include the majority of UK organic farmers and is the largest political unit. In the text we will refer to EN wherever this level is most appropriate and to UK for all observations that are relevant at national level (mainly the food market).

In IT, the regions have most of the power in agricultural policy implementation and therefore institutional development may differ at regional level. Some Regions have historically been more in favour of organic farming (like Marche, Emilia Romagna and Tuscany), but this has not always resulted in major differences in the level of uptake of organic farming. Other factors (such as organic market conditions and the economic prospects of mainstream farmers) seem to have been relevant, too.

5.1 Institutional changes within the farming community

5.1.1 Organic farming associations and their interrelationships

Looking at developments in the organic farming community, we can distinguish two main patterns among the countries that have an average organic farming sector. In EN and DE, umbrella organisations were established and the number of newly emerging organic farming organisations in 1997-2003 was fairly small. In IT, no overarching umbrella organisation exists, whereas numerous organisations aiming at promoting organic farming developed. Nevertheless, for all countries in this group it is reported that interest and involvement in organic farming is increasing within public bodies and mainstream farming organisations, and that the sector is becoming more and more institutionalised.

In EN, the umbrella organisation SUSTAIN covers the whole spectrum of food, farming, health and consumer interests, and is specifically involved in campaigning for organic aims. It is the result of an amalgamation of two alliances that followed these aims before. Together with the organic farming organisation the Soil Association, SUSTAIN seems strong enough to influence organic farming policy at state level. Both organisations lobbied successfully for an Organic Action Plan, which was implemented by the government in 2002. Throughout the whole process, the reputation of the organic farming institutions (in particular the Soil Association) grew and they are now regarded by the state as credible consultants. In Germany, the

period from 1997-2003 is characterised by development of the organic farming organisations in two opposite directions. Until 2002, conflicts within the umbrella organisation of organic farming associations, AGÖL (Working group on organic farming), increased steadily. Several organisations resigned and, as a result, the organisation was dissolved. Soon after, however, the BÖLW (Federal association of the organic food industry) was founded, forming a broad federation not only of organic farming associations, but also incorporating organisations and enterprises in the food and trade sector. As opposed to AGÖL, whose aim was to be an expert in organic farming regulation, the aim of BÖLW is to strengthen representation of the organic farming sector in German federal politics. Besides these umbrella organisations, few new “purely” organic farming organisations have developed recently in EN and DE. This can be seen as a sign of the maturity of the farming community, which is now reaching a stage of consolidation. In Scotland, Wales and Northern Ireland, the organisational situation has been more dynamic because of the decentralisation process, but we did not attempt to report on this.

Internal disagreements within the organic farming community remain in both countries, mostly relating to differences of opinion on standards and the general objectives of organic farming. In other words, the higher level of institutionalisation or integration into mainstream institutions is a source of conflict about the extent to which such integration is desirable. However, these internal conflicts have not prevented the organic farming community from gaining increasing influence on agricultural policy. The interrelationships among organic farming organisations can be described as mostly cooperative, with some conflicting tendencies still remaining.

In IT, the organic farming community still seems more diverse, and conflicts are more prevalent in the political arena. A number of organisations have developed in the last years, mostly aiming at promoting organic farming. Few of them are judged to be important for the organic farming community and work in the field of certification and technical assistance. No organisations are reported to be focusing on policy making, i.e. the policy domain seems to play a secondary role for these organisations. Even though with FIAO there is only one organisation actually working as umbrella organisation (comprising certification bodies), other organisations challenge its role as the representative of the organic farming sector. Conflict is reported especially with the organic farming association AIAB. As a consequence of this non-uniform organic farming sector, conventional farming associations were in a position where they could claim to represent the organic sector too. In comparison with EN and DE, the interrelationships among organic farming organisations may be most appropriately described as competitive, even though there may be potential for moving to creative conflict when official recognition by mainstream institutions increases.

5.1.2 Institutional changes in research, training and advice

In EN and DE, mainstream research institutions increasingly include organic farming research, whereas a development of this type was not reported for IT. In EN, the Tesco Organic Centre was established at the University of Newcastle in 2001. In DE, all public agricultural research institutions at the federal state level engage in organic farming research, but only in 2000 was a separate institute wholly dedicated to organic farming research established on national level. This was an important step towards institutionalisation of organic farming in the hitherto largely mainstream state agricultural research. Organic research had been undertaken earlier in various universities, e.g. at the University of Kassel-Witzenhausen, which also established a separate study course in “Organic Farming” in 1996. In IT, an independent research

institution has been in existence since 1996 (GRAB-IT), and had been organising numerous workshops and published a few books focusing on economics and policy relating to organic farming, while a newly established association dedicated to organic and biodynamic animal husbandry was established in 1999 (Associazione Italiana Zootechnica Biologica e Biodinamica).

In EN, some coordinating activities have recently begun. The Initiative on Organic Research (IOR) started in 2001 as a partnership between the Elm Farm Research Centre and the Henry Doubleday Research Association, and as part of the restructuring of official organic bodies following the English Organic Action Plan, an Organic Research Priorities Board was proposed in 2002, but has not yet been established. Its aim would be to identify strategic research needs for organic farming. Before this, the Colloquium of Organic Researchers formed in 1999 already aimed at improving research and knowledge flow between researchers, policy-makers and end users.

As regards vocational training, the integration of organic farming into mainstream institutions differs in the various countries in this group. In DE, organic farming has been integrated at least to some extent into the curriculum of vocational schools and secondary vocational training for organic farming was offered in some schools even before 1997, while in IT and EN integration of this sort into mainstream institutions cannot be reported. No major changes in this situation could be observed for the period 1997-2003. Several courses were started in England in this period, but they have not been successful in attracting students. In DE, courses on farm management have been offered at national level since 2001 by a previously largely mainstream-oriented institution. In all countries, various universities offer courses on organic farming.

Within the advisory system, comparison across countries is difficult due to the considerable differences between the *Länder* in Germany that prevent an overall assessment of the national situation in DE. Integration into mainstream institutions is getting under way in EN, with general consultancy firms beginning to offer organic farming advice, although this is still mainly focused on specialist organic advisory services, with limited direct financial support. In DE, organic farming advice is organised differently from state to state, and public support for provision of organic farming advice is variable. Consequently, a certain level of integration of organic into the mainstream can be recorded here, but state activities vary considerably, from no financial support for any agricultural extension service to a stronger commitment to organic farming. In DE, the number of independent advisory agencies working outside organic farming organisations is steadily increasing and the launch of a knowledge database for organic advice in some *Länder* has strengthened cooperation within the organic advisory system. At national level, institutions such as VLK (Association of agricultural chambers) and SOeL (Foundation for organic agriculture) organise knowledge transfer and coordination between public and private advisors, and thus support networking among them. In EN, dissemination of technical information for producers and market statistics are provided by the Soil Association's Yorkshire Organic Centre and the Duchy College. In IT, the Ministry of Agriculture has established an official "National School for Organic Agriculture" aimed at providing permanent training courses in organic farming to civil servants (advisors, member of the police corps), farmers' organisations' advisors and certifying bodies' inspectors. The advisory system in Italy is reported to be particularly weak, but this is also true for mainstream agriculture. Limited organic extension and advisory services are provided by organic sector organisations (such as AMAB, AIAB, Terrasana) and by organic sections of mainstream farmers' organisations.

5.1.3 Interrelationships between organic and mainstream farming: cooperation or conflict?

In general, the mainstream farming community has opened up for organic farming in the past few years. However, in none of the countries in this group is organic farming supported by the mainstream in a pro-active way; in DE the farmers' union supports organic farming at a relatively low level.

In EN and DE, organic farming entered mainstream farming organisations via the creation of working groups or departments dedicated to organic farming. The National Farmers' Union (NFU) established an organic working group in EN in 1997, but from 2003 on, the different commodity boards became responsible for organic farming matters. In DE, the DBV (German Farmers' Union) started a committee for organic farming in 1999 and the DLG (German Agricultural Society) became active in 2001. In IT, too, the Farmers' Union has established organic sections within their organisation.

From the point of view of the organic farming community, an approach towards mainstream organisations can be observed in recent years, although roles still need to be defined clearly.

In EN and DE, the organic sector is reported to be more powerful and recognised officially by state bodies. In consequence, the mainstream farming community has to treat organic farming with some respect and cannot simply tone down its importance or isolate it. This is the basis for creative conflict between the two farming communities. From the point of view of the organic sector, recognition by the state and its expanding size have led to a need to seek serious political discourse with mainstream institutions.

The situation in IT is different. The position of the organic farming sector vis-à-vis mainstream institutions is rather weak, and internal conflicts within the organic farming community have made it possible for mainstream institutions to claim the right to represent organic farming. This situation can possibly best be described as cooperation, as the organic farming community does not appear to be strong enough to demonstrate the differences clearly. However, contact between the two communities was reported to be rather limited, and this points to a competitive situation. Thus, with regard to the interrelations between the two farming communities, we can find both cooperation and competition.

5.1.4 Summary of the institutional changes in the farming community

The situation of the organic farming community is varied in countries with an average organic farming sector. We find a more unified organic farming community in EN and DE, compared to a diverse and sometimes conflicting community in IT. In consequence, recognition by the state seems more established in EN and DE, while in IT some difficulties are reported as regards who represents the organic farming sector.

In DE, this recognition by the state had some implications for the behaviour of the organic farming community. After the split-up of the umbrella organisation of organic farming associations (AGÖL), it became crucial that there was a counterpart for the state on the private side. Thus, the establishing of a new umbrella organisation BÖLW, this time including processing and trade, was indirectly fostered by developments at state level. The dissolution of the old organisation, which acted mainly to provide organic farming expertise, gave way to the development of a new

organic farming umbrella organisation oriented in the direction of lobbying. In EN, the Soil Association and the comprehensive environmental umbrella organisation SUSTAIN demonstrated their recognition by the state when they were successful in lobbying for an Organic Action Plan that was implemented by the government in July 2002.

In DE and EN, growing acceptance by the state led to more respect for the organic farming community by mainstream institutions. They could no longer ignore organic farming as it became a competitor in the market for political influence. On the other hand, the organic farming community also had to enter into serious political debate with the mainstream farming community as its influence on politics increased. Pure competition is changing into creative conflict. This shift to a non-competitive interrelationship between the farming communities is nourished from both sides.

In IT, different organic farming organisations are engaged in dispute regarding the representation of organic farming at national level. Recognition by the state is beginning (see chapter 5.3), but no important effects on the organic farming community and their acceptance by mainstream organisations have been observed so far.

5.2 Institutional changes within the food market

In countries with an average organic sector, mainstream market institutions increasingly include organic food. The structure of the food market differs in these countries, with mainstream food retailers playing different roles in the marketing of organic products. While they are dominant in EN, and still hold an important share of all organic sales in IT, they are less relevant in DE where specialised organic food shops represent the most important sales channel for organic products and (especially organic) supermarkets have only recently been gaining in importance.

While not involved in marketing in IT, the state plays an important role in DE and EN. In both DE and EN, state initiatives have (indirectly) fostered changes in market institutions. In DE, the introduction of a national organic label based on EU standards in 2001 and the launch of the BÖL (Federal Programme for Organic Farming) in 2002 facilitated the integration of the organic food market into the mainstream. Supermarkets increasingly created their own organic brands. Since the introduction of the state logo, supermarkets have used it together with their own brand, and have thus been able to profit from ongoing state promotional campaigns for this logo. Interestingly, an initiative for a national label in 1999 failed to achieve far-reaching recognition by the market. Due to its focus on national products, prescribing a share of more than 90% of domestic ingredients for a labelled product and charging a licence fee for label use, it has not been accepted by the retail market. The BÖL financially supported initiatives from mainstream institutions such as, for example, branch organisations in the meat and bakery industry aiming at promotion of and training in organic food processing. The already existing AOeL (Working Group of Organic Food Producers) became a member of the BÖLW, established in 2002, so now organic food market representatives are directly linked with the organic farming community.

In the whole of the UK, the English Organic Action Plan is said to have achieved the commitment of multiple retailers to developing a 70% home produce supply target by 2010. Supermarkets such as Waitrose, Tesco's, Sainsbury's and the Co-op had already engaged in selling organic products, but with the action plan emphasis was placed on UK-produced organic food over imported, whereas previously the level of imports in the UK had been very high. Apart from this push from the Organic Action

Plan, no direct state marketing support for organic food has been recorded for the UK.

In IT, a national law from 1998 has made the use of organic products in public canteens (schools, hospitals) compulsory. Although only some municipalities have implemented this provision, an increasing number of canteens are using organic products (at least to some extent) for their catering services. In the Emilia Romagna Region, a regional law supporting public procurement of organic products in public canteens was approved in 2002, making the use of organic products in public canteens compulsory and providing specific financial support for the implementation and coordination of public procurement activities.

Especially in UK, marketing initiatives are observed at regional level. The label “Organic” is often linked with the label “Regional” and these initiatives are reported to be successful. In DE, too, similar initiatives can be identified, but the link between “organic” and “regional” is not without problems. In some cases the term “regional” has been misused to tone down the differences between “organic” and “conventional” farming.

In EN, some separate organic market organisations have developed in the last years for different products and in DE, two big organic farming organisations - Demeter and Bioland - outsourced their market activities to own associations from 1997 on. Market activities are thus not completely left to mainstream institutions, but the organic sector itself is also engaged; in DE the BNN (German Association for Natural Food and Products) plays an important role as regards market activities for organic products. However, a high level of integration into mainstream institutions is recognised. In EN, organic is integrated into all commodity boards of the NFU. Numerous examples of multinationals taking over small organic processors are reported. Cooperation might best be used to describe the situation between the mainstream and organic food market, as no significant conflicts are reported between these two market sections.

In IT, institutional change in the organic food sector has been fairly impressive: the domestic market for organic food is growing fast and the entrance of new actors into the market (multiple retailers, supermarkets) at the end of the 1990s has completely changed the market institutional setting. Most of these chains already stocked organic products, but a more focused promotion and supply policy was not put in place until 2000. In 2001, Consortium (the largest organic producer organisation directly linked with the ESSELUNGA supermarket chain) was established and implemented a national campaign to introduce organic products into public canteens. The organic market is rather turbulent, with new market players emerging as others disappear. Vertical integration and fusions have been quite relevant in shaping the market to its new, larger niche, while in 2003 a number of closures have occurred, especially among small and medium-sized wholesalers and retailers. In any case, although integration is increasing, specialised shops still play an important role.

5.2.1 Summary of the institutional changes in the food market

The institutional development of the organic food market is not uniform in the three countries of this group. In EN and DE, cooperation is the prevailing interrelationship between the organic and the mainstream food market. State activities have influenced the development of market institutions and the integration of organic into the mainstream. Regional marketing initiatives are said to play an important role in all three of the countries studied here (DE, IT, EN), and institutions such as labels or promotional campaigns exist to foster the organic food market. In addition, separate

market channels for organic food continue to play a role, i.e. a certain level of competition remains.

In IT, no relevant initiative on the part of the state has so far been reported, and the market is said to be rather turbulent, making it difficult to identify a particular type of interrelationship. However, integration into mainstream is under way. The change from a mainly export-oriented market to the domestic market may be the reason for a situation where cooperation and competition appear to be present at the same time.

5.3 Institutional changes within agricultural policy

5.3.1 The role of changes in general agricultural policy

In EN, DE and in IT, changes in general agricultural policy have influenced organic farming. In EN and DE a general change in agricultural policy took place, with a shift from production objectives to quality and public good objectives (including a cleaner environment). In EN, the most significant change was the formation of Department of Environment, Food and Rural Affairs (DEFRA) from the former Ministry of Agriculture, Fisheries and Food (MAFF) two years after the election of a Labour government in 1997. Sustainability was made one of the principles of future policies, and thus greater support for organic farming was justified. However, other state institutions still oppose support for organic farming, so we cannot assert that there is full integration of organic farming into state institutions. In DE, again, a change of government had a strong effect on organic farming. In 1999, an independent department of organic farming was established within the Ministry of Agriculture and the government committed itself to actively support organic farming. In 2000, triggered by the BSE crisis, a new Minister for Consumer Protection, Food and Agriculture was appointed from the Green Party. From then on, the development of organic farming was made one of the main objectives of agricultural policy. What is more, in 2002 the federal government approved a national sustainability strategy that included organic farming as one indicator for sustainable development in Germany. In consequence, organic farming was no longer only a main aim of agricultural policy; it became part of the overall policy goals of the German government. In IT, the rural development plans established in 1999 established the framework for further development of organic farming at regional level. However, their influence on the development of the organic farming sector has not been evaluated so far.

5.3.2 Changes in organic farming policy

Against the background of a generally more open attitude towards organic farming, the agriculture ministries in EN and DE both developed targeted action for this type of farming, mainly after the year 2000. In IT, such a focussed policy is only starting and a new national bill on organic farming is said to come into force in 2004, along with an action plan. Common to EN and DE is the establishment of a comprehensive programme aiming at supporting the development of organic farming. In DE, the main changes took place in a shorter time, focussing on the year 2001. Financial support for farmers for conversion and maintenance was raised stepwise in most *Länder*, the national label for organic products was introduced and the BÖL (Federal Programme for Organic Farming) was developed on the basis of suggestions made by external experts and representatives of organic farming associations. A law on organic farming regulating information and inspection of organic farming was

implemented in 2003 which, among other things, assigned the role of supervising inspection to the BLE (Federal Agency for Agriculture and Food). The English Organic Action Plan and the German Federal Programme for Organic Farming can be seen as culminating points of an agricultural policy that is taking organic farming seriously. This development started in EN with increased financial support for conversion in 1999 and continued with the establishment of an Organic Action Plan committee in 2001 that brought together organic farming organisations, retailers, consumers, the food industry, environmental NGOs, research bodies and other stakeholders. The Action Plan was implemented from 2002 onwards and can be seen as a response of the government to the growth of the organic market as well as to developments elsewhere in Europe. This increased public support for organic farming is not free from criticism. Although trying to promote organic farming as being strategically relevant for policy-makers, the organic sector in EN fears losing control over the direction of development.

In IT, agricultural policy is dealt with by both the Ministry of Agriculture and the 21 Regional Governments. Conflicts among these institutions have historically been the basis for fragmentation of organic (and mainstream) farming policy. Recently, these conflicts are being resolved, which prepares the ground for a greater degree of harmonisation and coordination of organic farming policies between national and regional level.

In 2000, a National Committee for Organic & Ecological Farming (Comitato Nazionale per l'Agricoltura Biologica ed Ecocompatibile) was established by the Minister of Agriculture. The most important institutions in organic and mainstream farming appointed members to this Committee, as did consumer organisations and mainstream processors' umbrella organisations. The Committee had a consultative role and aimed at promoting organic farming in Italy. In the new bill presented in 2004, the Committee was renewed and transformed into an official and permanent committee for negotiating organic farming policy. The Committee was enlarged and now comprises a majority of organic sector representatives, representatives of the Ministry and, as a new addition, representatives of the Regional Governments. The bill also includes a proposal for a negotiating and coordinating committee for organic farming policy at national level with members of both the Ministry and the Regional Governments in order to facilitate harmonisation of sectoral policies at regional level.

5.3.3 Summary of the institutional changes in agricultural policy

Organic farming has become increasingly important for agricultural policy in EN and DE. In these two countries, the state has played an important role by initiating focused political action aimed at promoting organic farming. In IT, the situation varies from region to region, while at national level a policy more focused on organic farming has recently been considered.

A major influencing factor in DE and EN was the change in government that brought with it a more open-minded attitude towards organic farming. Concerted Actions for organic farming started, and organic farming seems to have become part of agricultural policy to a reasonable extent. These Concerted Actions created the framework for increased state activity in the food market domain too (as described in chapter 5.2). In accordance with observations made in countries with a larger organic farming sector, private organisations in these countries now fear that they may lose their influence on the direction of organic farming development.

5.4 Changes within the institutional setting

Both in EN and DE, a variety of examples of cooperation between the organic farming sector and other groups in society can be identified over recent years. Trade plays an important role as a partner in EN, whereas in DE only a few initiatives involving cooperation between organic farming organisations and trade enterprises can be found. For both countries, the public debate on GMOs seems to play a role in the cooperation of institutions across domain borders. For EN it is reported that such instances of cooperation have indeed strengthened the position of the organic sector in getting policy development onto the government agenda.

As far as intra-movement cohesion is concerned, two phases of development can be distinguished in DE. Until 2001, an umbrella organisation of organic farming associations existed, but internal conflicts increased to such an extent that the organisation was dissolved. The sector recovered quite quickly, however, by creating a new umbrella organisation, BÖLW, which now encompasses not only farming organisations, but also processing and trade. It has been able steadily to gain influence on German agricultural policy. Such internal cooperation is not reported for the organic sector in EN. Conflicts among organic farming institutions concern fundamental questions relating to the direction of the organic farming movement's development. Experts fear that these internal conflicts could weaken the political influence of the organic sector.

Most conflicts in DE and EN occur between organic farming institutions and policy or the state, respectively. Thus, the organic sector is able to show its strength and is accepted as a partner for discussion on agricultural policy issues. The situation here can best be described as creative conflict, as the general attitude of policy in EN and DE is not resistant to organic farming concerns.

Conflicts with mainstream institutions seem less important in DE, but are reported for EN. As the increase in financial support for organic farming has led to conflicts about reducing the funding available for conventional farming, the interrelationship between the organic and the mainstream sector has tended to become increasingly competitive.

All in all, the state plays an important role in EN and DE by defining the framework within which market activities for organic farming can take place (see chapter 5.2). Through Concerted Actions like the Organic Action Plan in EN and the Federal Programme for Organic Farming (BÖL) in DE, institutions were supported to become active in the organic market domain and in this way an institutional setting was established to some extent.

In IT, the level of cooperation of the organic sector institutions with others is reported to be rather poor, and the number of conflicts is low. This may be due to the lack of cohesion among organic sector institutions that weakens its acceptance by mainstream institutions. Competition may be the best word to describe this lack of contact. At the moment a strong organic movement seems not to have been established successfully. However, in 2000, the "Comitato Nazionale per l'Agricoltura Biologica ed Ecocompatibile" a national committee for organic farming was initiated by the Ministry of Agriculture. It aims at grouping together all organisations relevant to organic farming. It is said to have been the most important forum at national level so far, constituting a training arena for capacity building of the organic sector institutions, but it has also highlighted the conflicts and divisions among the organic sector representatives. Until now, an effect on the organic farming community in terms of more cohesion has not been reported as an outcome of this development. Nevertheless it is a first step in the institutionalisation of organic farming.

5.4.1 Summary of changes within the institutional setting

The institutional setting is more highly developed in EN and DE than in IT. In the first two countries, creative conflict is coming into being between the organic farming sector and the agricultural policy; the organic farming sector is recognised by the state as a serious partner for discussion. Conflicts with mainstream agricultural institutions are said to play a role in EN, but not in DE. Of all three countries, internal conflicts within the organic movement are lowest in DE and highest in IT, where these conflicts hamper acceptance by the state. Here, contact between organic and mainstream institutions is scant, which points to a situation of competition.

5.5 Summary of the development of the institutional environment

The guiding hypothesis for this country group was that for further development of the organic farming sector (in EN and IT), a change in the institutional environment would have been a prerequisite. As information about the Italian situation is scant, the following conclusions will mainly discuss the situation in DE and EN.

- Regarding the interrelationship between the organic and the mainstream farming community, we can observe a change in the direction of creative conflict in EN, while no change in the cooperative (and competitive) relationship can be recorded for IT. The higher level of acceptance of the organic farming community by the state in EN and also in DE forced mainstream farming organisations likewise to recognise organic farming as a serious partner for discussion. Thus, the foundations for creative conflict have been laid. Consequently, the hypothesis holds true for EN and could also be corroborated for DE. In IT, the organic farming sector has grown in spite of ongoing conflicts within the organic farming community, and other factors also seem to exert an influence here.
- As regards the food market domain, changes at the institutional level can be observed in EN and IT. Involvement of mainstream institutions has increased considerably and the interrelationship between organic and mainstream institutions has thus changed from competition to cooperation. When testing the hypothesis in DE, however, we find a situation more comparable to EN, so that, all in all, the importance of a cooperative interrelationship between the institutions of the organic and the mainstream food market can be affirmed in all three countries.
- The institutional setting has gained in importance in EN and DE in recent years. In both countries, the institutionalisation of organic farming accompanied activity on the part of the government in establishing an action plan or a federal programme for organic farming, respectively. In IT, internal conflicts within the organic farming community are said to hamper full recognition by the mainstream farming community and thus the interrelationship in the institutional setting has not developed away from cooperation, even though the state has made an attempt to bring together representatives of organic farming.
- The level of conflict within the organic farming community in IT is still high, leaving room for mainstream farming organisations to claim to represent organic farming.

In this Chapter 5 we described the importance of the state for the development of the organic farming sector (implementing an organic action plan or a federal programme

for organic farming). Thus, when looking at the leading hypotheses, recognition in all domains of society and state intervention seem especially interesting for this group of countries.

- In DE organic farming is recognised at government level as a realistic option for the sustainable development of the country. This constitutes the greatest degree of recognition in this group. However, in EN, organic farming is also recognised by policy, the food market and the farming community as a realistic option. A different situation emerges for IT again. Here, organic farming is highly recognised by the market and the policy domain, but not yet by the general farming community. Internal conflicts within the organic farming community hamper its full recognition by the state and the mainstream farming organisations.
- It was hypothesised that state intervention may cause a loss of organic farming identity. We need to look at this argument more closely, particularly for the situation in EN and DE. In these countries, the stronger commitment of the state, e.g. after a change in government, influenced organic farming development in two respects. On the one hand, this commitment facilitated access to policy by organic farming organisations, and at the same time these organisations had to respond to state activity. Thus, they were forced to formulate their positions and find a more unified approach. On the other hand, the high level of recognition by the state encouraged mainstream institutions to take organic farming more seriously as they became new competitors for political control. In conclusion, the pull strategy from the state side has led to a more beneficial situation for organic farming development: recognition by the state, recognition by the general farming community and more unity within the organic farming community. The hypothesis could therefore not be corroborated; rather, the identity of the organic farming community has been strengthened by the creation of favourable framework conditions by the state.
- The change in government has to be mentioned as a catalyst in EN and DE. The institutional setting that has developed through the Organic Action Plan (EN) and, to a smaller extent, through the Federal Programme for Organic Farming (DE), may ensure the catalyst function in future.

6. Countries with a large organic sector: AT, CH, DK

The countries in this group generally have a long history of organic farming. The share of organic farms in each case is clearly above EU average. The growth rate of the share of organic farms varies: in CH and DK on the one hand, it doubled between 1997 and 2002, while in AT it has stagnated at a high level. Of this group of countries, AT and DK were already studied in the previous report.

Table 6-1: *The interrelationship between organic farming and mainstream agricultural institutions in AT and DK from the previous study*

	Organic farming community	General farming community	Food market	Agricultural policy	Institutional setting	Overall evaluation
AT	competition	cooperation	creative conflict developing	cooperation	cooperation dominated by general farming institutions	pure cooperation
DK	cooperation	creative conflict	creative conflict	creative conflict	Creative conflict dominated by organic farming views	creative conflict

Source: Michelsen et al. (2001)

Analogously to the previous country groups, we will try to answer some country-specific questions that concretise the general hypotheses set out in the introduction. The overall interrelationship between organic and mainstream farming institutions in AT is characterised as being close to pure cooperation. This would lead to the assumption that development will stagnate if no major change in the institutional environment occurs. In contrary to what was said for IT and EN, an institutional setting does exist. So the hypotheses for AT are:

- A higher level of internal cooperation within the organic farming community in AT might contribute to the development of institutional interrelationships in the direction of creative conflict.
- If there were an impulse for the development of organic farming in AT, the interrelationship between organic and general farming institutions would change in the direction of creative conflict.

In DK, the overall evaluation of the institutional interrelationship between the two farming systems is one of creative conflict. It seems reasonable to postulate the following hypothesis:

- Persisting creative conflict between organic and general farming institutions has led to organic farming growth in DK.

For this group, CH may serve as a control function for the hypotheses established.

- In CH, a similar pattern of institutional development and development of interrelations can be observed as in DK and AT; the pattern of interrelationships is comparable and the steps needed for successful development of the sector have been completed.

6.1 Institutional changes within the farming community

In this section we will look at institutions in the farming community, focusing on changes that occurred between 1997 and 2003. We are interested in the organic farming community itself, with its internal relations and changes, as well as its interaction with institutions of the general farming community. The farming community comprises farmers' associations and institutions for research, training and advice.

6.1.1 Organic farming associations and their interrelationships

In all of the countries with a larger organic sector, organic farming associations were established some time ago and umbrella organisations play a role; however, umbrella organisations are found at different stages of development. CH has had one unifying organic farming association since 1981, in DK two (formerly closely collaborating) organisations merged in 2002, while in AT the merging process is currently (as of 2004) under way.

In CH, the change that took place in the period 1997-2003 was the re-naming of the umbrella organisation in 1998 from the abstract short form "VSBLO" to "BIO SUISSE", which could be more easily recognised in the market, thus acting as a sort of brand. This new orientation towards the market was supported in 1999 by outsourcing the certifying body to an independent organisation "bio.inspecta", which also took over inspection activities from FiBL (Research Institute of Organic Farming). At the same time, two other independent inspection bodies were founded outside of BIO SUISSE: BIO TEST AGRO and SQS, thus diversifying the inspection market in Switzerland, which now consists of four institutions altogether for inspection of farms (two), processing and trade (three).

In Denmark, the organic farming association LOJ merged with the umbrella organisation of organic trade associations, OLC, into the newly founded DO (Danish Association for Organic Farming) in 2002. This can be regarded as the last step in a process of consolidation following a period of reorientation and repositioning vis-à-vis mainstream agriculture. In the years preceding this merger, the considerable importance gained by LOJ in the initial years of organic farming in Denmark had been continuously eroded. As a result, eight organisations merged into one (DO) to strengthen their influence on politics. DO has managed to retain the influence that the former eight independent organisations had built up.

The organic farming sector in AT decreased in the period from 1997-2003 in terms of the number of organic farms, and did not begin to recover from this trend till 2001. This is due to the fact that in 2000 the Austrian environmental programme ÖPUL came to the end of its term, and farmers were able to choose whether to continue or to withdraw from the programme. Since then, at the institutional level, a process has been under way to found a common governing body of organic farming associations in Austria, named "BIO AUSTRIA". Its aim is to unite the different and often opposing organic farming umbrella organisations ARGE Biolandbau, ÖIG and Bio ERNTE AUSTRIA to form one organisation that could then act as a contact for state bodies. It should be emphasised here that this process was largely initiated by the state and not by the organisations themselves. However, the organic umbrella organisations took up the challenge and are now actively shaping the process of unification. External factors prompted another change in the period in question. The number of inspection bodies was reduced from 22 to seven in 1998 due to new

requirements under EU norm 45011 (General requirements for bodies operating product certification systems) that not all of them were able to comply with.

The level of conflict among organic farming associations is low in CH and DK, but higher in AT, where umbrella organisations have hitherto competed. It is estimated that the establishment of a new governing body will present a more unified image of the organic farming sector in AT. In DK, the organic farming community is reported to be losing its grassroots character as it becomes increasingly professional. The merger into one organisation representing organic farming in Denmark at the political level has been successful and, in consequence, DO is developing towards becoming a strong political actor. In CH, internal conflicts within BIO SUISSE or between BIO SUISSE and other institutions of the organic farming community have not so far resulted in weakening its position towards third parties. BIO SUISSE is recognised as “the” actor for organic farming in Switzerland.

6.1.2 Institutional changes in research, training and advice

A common characteristic of countries with a large organic sector in terms of training and advice institutions is the integration of organic into the mainstream at least to some extent during recent years. As regards research, there has been some integration, while separate organic research institutions have remained important especially in CH and DK.

In DK no changes in the high level and number of mainstream research institutions working entirely on organic agriculture via DARCOF (Danish Research Centre for Organic Farming) can be reported for the period 1997-2003. In CH, in contrast, mainstream federal research institutions became more involved in organic research during this time. In AT, an important development for organic farming research was the establishment of the IFÖL (Institute for Organic Farming) at the Vienna University of Natural Resources and Applied Life Sciences (BOKU) in 1998. From then on, research activities have been reinforced and courses already offered at university level have been extended and properly established.

Organic farming can be found in the curricula of vocational training for young farmers in all three countries, and separate schools for organic farming can also be found. In DK, specialised vocational training has been available since as far back as 1982, and from 2003 on, institutions have been reorganised in such a way that one agricultural college is now exclusively teaching organic farming. In AT, a separate vocational training institute dedicated exclusively to organic farming was established in 2002. A similar initiative (with a one-year course) will start its trial run in CH in the academic year 2004/2005.

With regard to extension services, again a certain level of integration into mainstream institutions is reported for all the three countries. In CH and AT, there is a recognisable tendency towards integration of organic advisory services into the extension system of the cantons or *Länder* respectively. The development in DK is more straightforward: here, the centre for organic extension that pools knowledge resources on organic farming is located within the main agriculture extension service system. In addition, organic advisors are placed in the regions.

6.1.3 Interrelationships between organic and general farming: cooperation or conflict?

In the group of countries with a large organic sector, a distinction can be made between countries with a constructive atmosphere between mainstream and organic farming organisations, namely CH and DK, and AT, where the interrelationship is less constructive.

The interrelationship between organic and mainstream farming institutions in Switzerland can be described as mutual respect. The biggest conflict between BIO SUISSE and the BLW (Federal Office for Agriculture) in recent years occurred in 1998 when the national regulation on organic farming was discussed in detail. BIO SUISSE is regarded as such a strong independent organisation that the SBV (Swiss Farmers' Union) did not see the need to establish a working group of its own on organic farming. That is, positions are quite clear and are respected by the different actors; discussions can take place. While cooperation can be recognised in some respects, such as the attitude towards GMO in agriculture, for example, competition is reported in others. These are characteristics of a situation of creative conflict.

In DK, the organic farming community follows a double strategy towards mainstream farming: on the one hand, integration is sought (and has already been achieved to some extent), while on the other hand, it fosters relations with allies of organic farming outside the agricultural sector. It seems that in such a situation mutual respect between the general and the organic farming community is given, but differences are not toned down as organic farming tends to stay in close contact with allies from the environmental sector. Creative conflict can take place.

In AT, the organic farming community is not completely unified although, as a consequence of the development of BIO AUSTRIA, a trend towards more unity can be observed. However, this development was to a large extent initiated by the state (which is closely linked to the mainstream farming community), so that actual strengthening of the organic farming community cannot clearly be stated. The general farming community, on the other hand, has been creating its own working groups and committees on organic farming, thus trying to integrate organic farming into its organisations. This is perceived as 'alibi activities' by some representatives of the organic farming sector and is another example of the weak position of this sector. The interrelationship between the two farming communities can be regarded as cooperative, with the organic farming community being too weak to publicly announce differences (which is also due to financial dependency on government resources). Internal conflicts still play an important role, although this role has become less important in recent times. On the other hand, the laborious process of unification forces the organic bodies to concentrate on themselves and thus hampers broad public debate.

6.1.4 Summary of the institutional changes in the farming community

The situation of the organic farming community is different in each of the three countries with a large organic sector. A distinction can be made between CH and DK on the one side and AT on the other. In CH and DK, we find a rather strong and unified organisation representing the organic farming community. It is highly self-determined in its development and able to maintain creative conflict with mainstream institutions. They are recognised as serious partners in the discussion process on agricultural policy. In AT, the organic farming community is more diverse and internal differences hamper the establishment of a creative conflict with

mainstream institutions. Instead, the interrelationship is more conflicting. Due to the weak position of the organic farming community, it is best described as cooperation where differences of the farming systems are toned down. The state and other external factors play an important role as regards changes in institutions. Development within the organic farming community is to a large extent initiated by the state, and not self-determined. In consequence, recognition by state officials remains rather superficial.

Integration into mainstream institutions can be observed in all of the countries in the field of training and advice, while segregation is also reported (separate vocational training for organic farmers).

6.2 Institutional changes within the food market

As far as the food sector is concerned, one observes a high level of integration of the organic into the mainstream. In AT, CH and DK, large retail chains are the main distribution channels for organic produce. In recent years, this trend of integration has continued. In DK, for example, four organic food firms merged with mainstream food firms in the period 1999-2000. A discounter entered the organic food market in Austria in 2002, whereas in CH the main suppliers of organic food, COOP and MIGROS, have expanded the range of organic products they offer. Mainstream market institutions in Switzerland tend to integrate the organic food sector into their organisations, e.g. via specialised working groups which work together with BIO SUISSE to different extents.

In all three countries, concentration within the (general) food sector is an ongoing process. Due to the high level of integration, this trend also influences the market for organic food. The responses of the organic sector towards this trend differ from one country to another. While in Denmark a number of processing and distribution firms established the “O-group” in 1998 and are generally working together more closely with the organic farmers’ association, in Austria the governing body BIO AUSTRIA is just developing. This umbrella organisation will aim, among other things, at strengthening the position of the organic sector within the general market. There are also efforts being made at the level of product sectors, such as the “Bio-Getreideagentur” which keeps a tight grip on the organic cereal supply chain to the processors and mainstream market outlets. The establishment of an organic food cluster following the Danish example, however, has failed.

In both DK and AT, a second strategy can be observed: to a small extent the organic food market is segregating itself from the general food market by initiatives such as internet marketing ventures and organic supermarkets. In DK, around 40.000 frequent customers use the new internet-based box scheme currently based mainly on vegetables and fruit, but continuously enlarging the range it offers. In AT, so-called eco-regions (“Bio-Regionen”) were established, combining organic farming with regional identity in a rural development process in which marketing initiatives can take place. So far, these initiatives have more of a niche character, but may be interpreted as an answer to concentration trends. Here, it should be noted that direct marketing was the original strategy for organic farming in the early days. An important factor for its growth, however, has been marketing via big retail chains. The current trend towards greater segregation from mainstream market channels as a kind of diversification of the market is only possible if a critical size of organic food market is reached.

In CH, several new organisations have been established in recent years aimed at coordinating the organic food market. The importance of different branch

organisations is increasing in Switzerland. So far, the organic food sector has not found its own strategy in response to this development. At the present time, both scenarios are possible: further integration into such mainstream organisations or establishing separate organisations. In AT, few branch organisations were established between 1997-2003 in order to connect the collection of organic food and distribution through mainstream sales channels. In DK, OLC already fulfilled this role before 1997 and merged into DO together with the “O-group” of processing and distribution firms in 2002 (see chapter 6.1).

In DK and AT, the state plays an important role in the organic food market. Several marketing initiatives for organic products have been launched, supported or financed by the state. These state initiatives range from consumer information and promotion campaigns to projects and regional legislative initiatives for the supply of public canteens with organic food. No such campaigns have been reported in CH, where the private sector runs promotional campaigns. However, in Austria, the state initiatives are not exempt from criticism as it is reported that the image of organic farming is also being used in promotional campaigns for mainstream farming. This was a major source of conflict between the organic and mainstream farming sector in 2001.

6.2.1 Summary of the institutional changes within the food market

In conclusion, one can find a cooperative situation between the organic and the mainstream food market in countries with a large organic sector. It is an atmosphere of mutual respect; in CH and DK, some creative conflict is reported. In order to avoid toning down of the distinctiveness of organic products due to their increasing integration into mainstream food institutions, new strategies are being developed by the organic institutions, involving stronger cooperation within the organic food sector and explicit involvement of organic farmers’ organisations in the food market.

6.3 Institutional changes within agricultural policy

In countries with a large organic sector, discussions that do not primarily focus on agriculture are increasingly influencing the framework for the development of institutions relevant to organic farming. Institutional changes are happening both in general agricultural policy and in specifically targeted organic farming policy.

6.3.1 The role of changes in general agricultural policy

In all three countries AT, CH and DK, organic farming has become part of the general agricultural policy debate. Organic farming is no longer regarded as exotic, but is accepted by state institutions responsible for agricultural policy. It should be pointed out, however, that this acceptance does not reach the same degree in every country, and boundaries between true acceptance and absorption by the mainstream are fuzzy.

The most important changes in agricultural policy that influenced organic farming development took place prior to the period considered in this report. The early nineties marked a time of major changes in favour of organic farming. During this time, in all three countries, AT, CH and DK, agricultural policy recognised organic farming as a way of improving environmental performance and general reduction of surplus in agriculture. Organic farming was granted financial support and governments showed themselves to be open-minded towards this particular method

of farming. Nevertheless, changes in the period 1997-2003 did influence the development of organic farming and its institutions.

In AT and DK, promotion of organic farming was conceived as an appropriate policy instrument to reach environmental targets. AT viewed organic farming as a strategy for reaching sustainability targets based on the Kyoto protocol and as a suitable instrument for rural development. In Denmark, organic farming is indirectly mentioned in the Action Plan for the Aquatic Environment as a suitable measure for a cleaner aquatic environment. Currently, the broad public debate on GMO (genetically modified organisms) is directing public attention in all countries towards organic agriculture as an alternative to mainstream farming due to its clear non-GMO strategy.

New institutions became involved in organic farming in AT and CH. In AT, as an answer to the BSE crisis, the Agency for health and food safety (AGES) was established in 2002 and is responsible – inter alia – for quality assurance and inspection; in CH, the Federal Office of Public Health (BAG) became involved in the implementation of the regulation on organic farming in 1997. These examples indicate a stronger integration of organic farming issues into the mainstream agricultural policy environment, which had already taken place in DK.

6.3.2 Changes in organic farming policy

Targeted policy development for organic farming has not stood still in this group of countries, although the focus varies.

In all of the countries, and especially in AT, state involvement in organic farming policy resulted in a reduction in the importance of private organisations. In 1997, the state regulation on organic farming came into force in Switzerland, with the immediate consequence that the importance of the private standards of BIO SUISSE diminished and BIO SUISSE found itself increasingly in the situation of reacting to changes at national level instead of acting. A similar development was noted in DK, where the DO suspended its private standards after the state engaged in organic farming regulation. In AT, private organisations never had a major influence on national policy, mainly due to lack of unity in the organic farming community. The state took the active part to such an extent that not only did it decide to provide financial support to farmers, but it was also instrumental in initiating the establishment of BIO AUSTRIA as an umbrella organisation of organic farming associations. In AT, the whole discussion on organic farming is very much directed by the agricultural ministry, whereas in CH BIO SUISSE has been able to retain some influence.

In DK, the period between 1997-2003 can be divided into two phases. Until the change of government in 2001, a cooperative atmosphere between private and state institutions was reported to have positively influenced the political environment. Action Plan II – “Developments in Organic Farming” came into force in 1999 as an comprehensive policy instrument. The state institution in charge of organic farming, OAC (Organic Agricultural Council), was reorganised in 1997 to OFC (Organic Food Council), which constituted a shift from the production point of view to food and consumption. In 1999, the OFC was strengthened when a permanent secretariat was installed. A task force was established within the agricultural ministry to coordinate and promote organic food interests. This positive attitude of state institutions towards organic farming was revised after the change in government in 2001. The task force’s importance diminished and organic farming was not included in new initiatives to regulate agricultural pollution.

On the private side, major changes cannot be recorded except for Austria. The development of an umbrella organisation of organic farming associations is said to be of considerable importance. Again, however, this development was initiated by the state, and the private sector is now responding only as a consequence. It was mentioned that this might have a positive effect in terms of strengthening the organic farming sector, but no evidence of this can be given so far, as internal debate within the sector has hampered development. In addition, the GMO debate has unified a range of environmental and alternative agriculture NGOs. Their influence on political decisions, however, remains weak.

In Switzerland, changes in private institutions relevant to organic farming policy mostly affected the coalition of actors that actively promoted an alternative agricultural policy prior to 1992 when major changes took place (these were mostly consumer and environmental organisations). After its success, the importance and cohesion of this coalition, and thus its influence on politics, diminished. Only recently, with the current debate on GMO, it is reported that the “old” alliance has been reactivated and even complemented by the mainstream farmers’ union joining in the rejection of GMO in Swiss agriculture. For the new agricultural law, BIO SUISSE was assigned to working groups that advised policy-makers on the design of the law. However, it was not included in the government’s advisory committee for agriculture, which may indicate that, in the eyes of the state, this purely organic farming actor is not perceived as very relevant for general agricultural policy.

It can be observed that, at present, organic farming policy in AT, CH and DK is not only focussed on national policy, but is clearly oriented towards the EU. In DK, Action Plan II is particularly concerned with the development of export markets for organic produce as a response to the oversupply of products for the domestic market and in accordance with the general export-oriented strategy of DK agriculture (which exports more than two-thirds of domestic production). AT regards organic farming as a major opportunity within the new trends of EU measures for rural development, as is the extension of the second pillar of CAP. In CH, bilateral contracts with the EU have led to increasing adaptation of EU standards relating to organic farming. Additionally, Switzerland is included in the information exchange system of the EU, which enables the state to adjust its standards according to changes at EU level. On the private side, however, there is no counterpart in the countries studied for this strong orientation towards the EU.

6.3.3 Summary of the institutional changes in agricultural policy

Common to the three countries is that policy issues that were not originally or exclusively linked to organic farming have become linked to it in recent years. Examples are the GMO debate and environmental policy issues. Organic farming has found its way into mainstream agricultural policy, but is recognised by the state to different extents. In DK and CH, the sector is highly accepted as an independent and strong movement, whereas in AT this respect is lacking, although it is commonly accepted in the country that AT should maintain its position of being “organic country n°1” within Europe. The most important changes in agricultural policy took place prior to the period studied here. It is stated that a phase of consolidation can currently be observed in CH and DK, with the state still playing an active part (but with less involvement) in further developing organic farming policy in all three countries. Private organisations are considerably influencing policies in DK, although their influence diminished for a short period because of the change of government in 2001, which gave organic farming policy a stronger orientation towards serving the food market. In CH, the importance of private standards decreased after the

implementation of the state regulation on organic farming, but the private sector still has some influence. Based on a comparison of these three countries, the influence of private organisations on policies is estimated to be lowest in AT .

6.4 Changes within the institutional setting

After having studied the three domains of farming community, food market and policy, this section is concerned with the interrelationships among the domains, i.e. the institutional setting. We will focus on the issue of conflict and cooperation and compare the internal and external interrelationships of the organic sector.

In AT, CH and DK, a considerable degree of cooperation among different institutions can be observed, as well as an important number of conflicts. The types of cooperation and conflict differ from country to country and it is difficult to draw a general conclusion.

In AT and CH, conflicts between organic and mainstream institutions seem less important than conflicts within the organic sector. In CH, member organisations of BIO SUISSE tend to debate issues directly related to organic production or trade with organic products, while conflicts in AT are judged to be more fundamental, i.e. regarding the organisation of the organic sector. Distribution of power plays an important role, and this is becoming even more obvious during the process of the BIO AUSTRIA development (which has not yet come to an end). Due to the rather low importance of the conflicts in CH, the organic farming organisation, BIO SUISSE, is still recognised as a strong strategic partner by other actors in the agricultural domain. This is underlined by the high number of instances of cooperation in which this organisation is involved with partners in all domains. In AT in contrast, the organic farming organisations do not engage in much cooperation; trade organisations and research institutions are the preferred partners.

In DK, cooperation is noted mostly between the state institution OFC and mainstream actors. The power of the organic farming sector is therefore not clear. On the one hand, the DO is highly accepted by state institutions and is a member of the OFC, while on the other hand, it does not engage directly in cooperation. The DO is reported to have several conflicts with mainstream institutions, mostly concerning trade and market issues. Internal conflicts within the organic sector also occur, but appear to be less important. According to experts interviewed, the organic sector in DK had relied too much on politics in the past, which led it into trouble when the government changed. However, because an institutional setting had been successfully established, and thus contacts with other actors had already been established in the past, it was possible to adapt to the new situation.

Cooperation with environmental groups is reported in all of the countries. It is currently focussed on (if not triggered by) the debate on GMO. Interestingly, the lines of conflict are not similar in the countries. Whereas the mainstream farm organisation joined an informal anti-GMO coalition in CH and AT, in DK it is outside the coalition against GMO.

6.4.1 Summary of changes within the institutional setting

In all the countries of this group, an institutional setting has been developed. Differences can be observed concerning the types of cooperation and conflict between institutions in the countries. Internal conflicts within the organic farming sector have hitherto been most significant in AT, and they play a role in CH, but are rather

unimportant in DK. In consequence, organic farming organisations do not manifest much cooperation with mainstream farming institutions in AT, whereas in CH the organic farming umbrella organisation is cooperating with a large number of institutions in all domains. In DK, the organic farming umbrella organisation has some conflicts with mainstream farming institutions. These conflicts are partly managed by the very active forum for debate and administration, OFC, which is organised by the state. For all countries in this group, cooperation with environmentalist organisations is reported, with the debate on the introduction of GMO in agriculture having an important influence.

6.5 Summary of the development of the institutional environment

With regard to the hypotheses established for AT, we can conclude that no major impulse for the development of organic farming has come from changes in the institutional environment. Government institutions regard the development of organic farming as necessarily based on market development. The goals formulated in the national action plans are rather modest. The possible results of the formation of BIO-AUSTRIA cannot be assessed at the moment.

- Cohesion within the organic farming community in AT is still lacking even though an umbrella organisation is currently developing. In consequence, the potential for entering into creative conflict with mainstream farming organisations is still rather low and the sector is stagnating.

In CH and DK, organic farming is recognised by the state as a realistic option for the future development of agriculture and is taken more seriously than in AT. The development of organic farming has not sped up in recent years, but, in contrast to AT, the organic farming sector in CH and DK doubled from 1997 to 2002.

- As far as DK is concerned, we can conclude that several steps were undertaken in the first part of the period studied and that therefore, creative conflict was able to develop between the organic and the mainstream farming community, as well as in the food market domain. In the second part of the period, no big steps for the development of organic farming took place in the policy domain. Recently, there has been a small step backwards, when subsidies for new organisational initiatives were cut back.
- In CH, the institutional environment is quite comparable to that of DK, with a high level of cohesion within the movement, cooperation between organic and mainstream farming institutions in the food market domain, and creative conflict with general farming community, the mainstream food market and in the policy domain. The established hypotheses thus seem to hold true in this control case.

For all the countries in the large organic sector group, it might be important to find ways of maintaining the potential for further change and development. That is, it is important to have an institutional setting or other catalysts to provide an impulse for adaptation when the need arises. The organic sector should be able to repeat some or all of the steps in the path for successful development of organic farming described by Michelsen *et al.* (2001).

7. Conclusions

7.1 Conclusions on the introductory hypotheses

In the conclusions at the end of each country group chapter, we have discussed the hypotheses established with regard to country-specific questions. We will now return to the hypotheses postulated in the introductory part of the report and discuss more general findings about the steps to be completed for successful development of the organic farming sector.

Hypothesis 1

Building up an organic farming identity is essential.

- **External (to a country or to the organic farming sector) pressure to initiate an organic farming sector or to change it significantly cannot lead to institutional development and organic farming growth if the organic farming community is lacking identity.**
- **State intervention may cause a loss of organic farming identity.**

An organic farming community has been established in all countries. However, the level of identity and internal cohesion varies. As this issue is most important for organic sectors at an early stage of development, we will focus on the group of new EU Member States. In the CEE countries studied, the pressure to develop organic farming has come not least from external factors related to the accession process. With the exception of PL, internal forces seem to have been present to use this external pressure for development of the sector. The share of organic farms has increased considerably in all of the countries except PL from 1997-2003 (see Table 3-1). In PL, the organic farming community is scattered across the country and cohesion is lacking. It thus seems that it has not been possible to establish an organic farming identity, which may explain why the size of the organic farming sector remains small. External driving forces have not translated into organic farming growth. These observations support the hypothesis postulated. As far as state intervention is concerned, the conclusions must distinguish between different modes of intervention. We will show that the hypothesis in this simplified form cannot be sustained.

We can distinguish four different patterns of state-private interaction during the development of the organic farming sector:

1. the private sector acts largely independently of the state, and thus state politics do not influence organic farming development to any significant extent (CH);
2. the state creates framework conditions that make it possible to start organic farming development (CEEC);
3. the state announces its commitment to organic farming and thus creates a pull factor for the organic farming community to become active (EN and DE from 1997-2003, DK at the initial stages of organic farming development);
4. the state itself gets involved in the development of the organic farming community (AT).

Each of these patterns has different implications for the organic farming community and its identity. In the first case, the organic farming community has to build up an

identity of its own if it wants to be recognised by the state as a political partner. Recognition by the state is easier in cases where the state provides favourable framework conditions or expresses strong commitment. In this case, it is the organic farming community that needs to adapt to the state initiative. Once an identity has been soundly built up, there seems to be little danger of losing it as a result of increasing state activities. In the case of strong state involvement, the organic farming community has to develop a proper identity and establish its own activity. If not, the identity of the farming community can be lost.

Thus we can conclude that it depends on both the state and the private organic farming community whether state involvement endangers the development of an organic farming identity. It is the interplay of state intervention and adaptation of the organic farming community to its circumstances that determines the outcomes of state involvement.

Hypothesis 2

Organic farming has to be recognised as a realistic option in all domains of society.

In countries with an average or large organic sector, institutions in the different domains of society recognise organic farming as an option. The mainstream farming community has accepted organic farming as a possible alternative in CH, DK, DE and UK and enters into discussion with the organic sector on various agricultural policy issues. In AT, the attitude of mainstream farming institutions is reported to be one of acceptance, but seemingly not one of true commitment. Marketing initiatives have tried to profit from the “organic” image for their own purposes of marketing agriculture in general, and thus differences between mainstream and organic farming are in danger of being toned down. The food market domain has demonstrated its interest in selling organic products, and supermarkets are strongly involved in most of these countries or are even the driving force behind organic farming development as in CH. The policy domain too has stated its openness to organic farming, but commitment on the part of the state to organic farming varies. Organic farming has been identified in AT and DE as an important component of an overall strategy for sustainability, and action plans or a federal programme for organic farming have been created in DK, EN and DE . Thus, recognition on the part of the state can be reported here, too.

In some of the countries with a smaller organic sector we also find recognition of organic farming in the policy domain. Recognition on the part of the state can be reported for CZ – a CEE country with a share of organic farms corresponding to the EU average. The environmental role of farming is also stressed in the agricultural policy of SI, and within this framework, support of organic farming is justified. It is thus recognised by the policy domain as an option, but still remains at a low level. In the other CEE countries, the situation is more one of ignorance. No policy strategy has been identified that explicitly names organic farming as an objective. Organic farming is mostly seen as a way of making use of EU money and in this way it is seen as an option by the policy domain.

We find recognition of organic farming as an option by all domains of society only in countries with an average or large organic farming sector. In the other countries, such recognition is only found in one or a few domains or is completely lacking. Our hypothesis can thus be corroborated, in that the recognition stated is a prerequisite for meaningful organic farming development.

Hypothesis 3

For organic farming growth, a climate for debate has to be created that allows for an exchange of views among all actors involved in agricultural policy and other relevant policy fields.

- **The interrelationship within the organic farming community has to be one of cooperation.**
- **The interrelationship between the general and the organic farming community has to be non-competitive.**

We were able to corroborate this hypothesis in our survey of eleven countries. In two of the three countries with a large organic sector, cohesion within the organic farming community is high and the interrelationship with the mainstream farming community is one of creative conflict. In countries where organic farming has been pursued by the state in recent years, cooperation within the organic farming community has increased. Both DE and EN have established an umbrella organisation. The organic farming community is thus more unified and better recognised by the mainstream farming community. When looking at the CEE countries, where organic farming is still in its initial stages, countries where there is strong cohesion within the organic farming community, namely CZ and HU, have the most highly developed organic farming sector in terms of the share of organic farms. In CZ, some examples of cooperation with the general farming community are given, although the importance of organic farming and its recognition are still at a low level. In all the other CEE countries that were included in our study, the organic farming community is more heterogeneous and there is less cohesion. A very clear example here is PL, where there are numerous different independent organic farming organisations that act at regional level without any superordinate coordination.

Hypothesis 4

For the development of organic farming, an institutional setting is needed.

- **It has to coordinate activities among the different domains.**
- **It can act as a facilitator for the adaptation of the organic sector to changing conditions.**

An institutional setting has been developed in all countries with a larger organic sector and is also starting to work in countries with an average organic sector (see Table 7-1). In EN, an institutional setting was established in the course of developing the Organic Action Plan. In IT, an institutional setting has so far been established only partially. It is generally lacking in countries with a small organic farming sector, i.e. the CEE countries except CZ. Here, a first step towards establishing an institutional setting was undertaken when the Organic Farming Action Plan was developed. All in all, an institutional setting does not seem to be very important for organic farming development in countries where the organic sector is still in its infancy. It gains importance when the sector is more developed, because then new actors appear in the different domains and institutions develop further. Consequently, coordination is needed to exploit synergies. From countries with a large organic sector we can see that an existing institutional setting was able to ensure organic farming growth. The first part of the hypothesis can thus be corroborated for countries with a more highly developed organic farming sector.

The second part of the hypothesis can also be corroborated. From our country studies, we can conclude that a well-established institutional setting can enable the organic sector to adapt to changing conditions and can thus act as a catalyst for change. Evidence is provided by the situation in DK, where the political framework conditions became worse, but the institutional setting was developed to such an extent that the organic farming community was able to react to the change and limit its negative consequences. This example also shows the importance of the quality of the institutional setting. In DK, it was and is based largely on organic farming views and enables an interrelationship of creative conflict to exist among the different domains of society. The institutional setting in AT is much less powerful, as it is more rooted in mainstream farming. Evidence of this was seen when the political climate for organic farming cooled down: the ability of the organic farming community to promote organic farming growth weakened as the institutional setting was not in favour. On the other hand, the community seemed too weak for creative conflict to take place.

Apart from the institutional setting, our survey was able to identify further factors that can act as catalysts for institutional change:

- change in government
- the EU accession process
- political debate.

In DE and EN, a change in government prompted the organic sector to react and make use of the new situation that was clearly more open to the concerns of organic farming. The result in both countries was increased recognition by the state and the mainstream farming sector, as well as a higher level of unity within the organic farming community. On the other side, the change of government in DK brought about a loss of acceptance of organic farming by the state. Although an institutional setting was established here, negative consequences for the organic farming sector were felt. It should be noted, however, that the extent of any negative effects was limited, as the institutionalisation of organic farming is well developed. This observation supports our assumption that a change in government can act as catalyst for the development of the organic sector in either a positive or a negative way.

For all CEE countries studied in this survey, it was clearly stated that the EU accession process had an important influence on the development of the organic farming sector. PHARE programmes were available from 1990 on and supported the activities of the organic farming community, which had started to become active mostly around the years 1989/90. With negotiations on EU accession starting in 1997, the CEE countries adopted European law and thus implemented organic farming regulations. Thus, the foundations were laid for further development of organic farming in these countries, organic farming was formally recognised by the state and financial support granted.

Political debate is presumed to be another means of catalysing organic farming development. One example is the debate on the Organic Farming Action Plan in CZ that gave an important impulse for organic sector development. In other countries, recent debates on GMOs are likely to push the development of the organic sector forward. Coalitions have been renewed in CH, and in other countries with a large organic farming sector, too, this public debate stimulates the sector's development. No changes have been identified in the organic sector for the time being, but in all countries experts attach some importance to the GMO debate. This leads us to the assumption that such a debate may act as catalyst for the development of the organic sector in future.

Thus, the hypothesis postulated above needs to be expanded. An institutional setting undoubtedly supports organic farming and can be a starting point for change, but other catalysts are possible, too. For further development of the organic sector, a driving force for change is indispensable; without such a driving force, it appears to be difficult for the organic sector to adapt to changing framework conditions.

Hypothesis 5

The larger the organic farming sector, the more steps on the path towards successful establishment of the organic farming sector have been completed. Completion of steps 1 to 3 (establishment of an organic community, political recognition, financial support for organic farmers) forms the basis for organic farming growth. Steps 4 to 6 (positive involvement of mainstream farmers' organisations, development of a proper organic food market, establishment of an institutional setting) are additional factors.

Table 7-1 gives an overview of the steps that have been completed in each country. We specify whether the step has been completed partly or fully, and whether it has been undertaken a second time (see Hypothesis 6).

Table 7-1: Completed steps to establish an organic farming sector by country

Country	① establishment of an organic community	② political recognition	③ financial support	④ positive involvement of general farming community	⑤ organic food market	⑥ institutional setting
EE	●	◐	●	○	○	○
PL	●	◐	●	○	○	○
SI	●	◐	●	○	○	○
HU	●◐	◐	●	○	○	○
CZ	●	●	●	○	○	◐
IT	●	●	●	○	●	◐
EN	●	●	●	◐	●	◐
DE	●●	●	●	◐	●	◐
AT	●	●	●	◐	●◐	●
CH	●	●	●	●	●	●
DK	●●	●	●	●	●◐	●

○ lacking ◐ partly completed ● fully completed ●◐/●● repeatedly undertaken

Source: Chapters 4 to 6

The table shows that steps 1 and 3 have been completed in all countries. A definition of organic farming has been laid down and a system of certification established. Financial support has been made available for organic farmers, although to varying degrees. Step 2, political recognition, has been achieved at least partly in all countries; in CEE countries, organic farming is often recognised by the political domain only in formal terms. This is a qualitative difference to countries of the other groups, where political recognition includes stronger commitment on the part of the state. The mainstream farming community is positively involved in organic farming only in countries with an average or large organic farming sector (except for IT), and the same cannot be stated for any of the CEE countries. Its involvement is stronger in

countries with a large organic farming sector, such as CH and DK. The fifth step, a proper organic food market, has been fully accomplished in all countries except the CEE countries. The next step, the establishment of an institutional setting, is the last step according to the report by Michelsen *et al.* of 2001. An institutional setting has been fully established only in two countries with a large organic farming sector (CH and DK), and partly in countries with an average-sized sector, including CZ. In the other CEE countries, no institutional setting has developed so far.

To sum up, the basis for development of the organic sector is present in all countries, and in countries with a more highly developed organic farming sector, more steps have been completed. However, this basis does not automatically guarantee the continued growth and development of the organic farming sector, as can be seen from the Austrian case of stagnation. Our hypothesis can thus be corroborated for countries where the organic sector is still at an early stage of development, but cannot simply be applied to countries with a more established sector. The next hypothesis sheds light on this conclusion.

Hypothesis 6

In countries with a larger organic sector, the steps have been undertaken more than once.

In countries with an average or large organic farming sector, a process of consolidation can be seen to some extent. This is explicitly reported for DK and DE. Table 7-1 shows the steps that have been undertaken repeatedly, thus indicating a sort of consolidation process. Evidence of such a process is the reorganisation of the organic farming community. Organisations have merged or agreed on closer cooperation through an umbrella organisation, and the work to be done has been (partially) redefined. Currently, experts from the organic farming movement feel that reorganisation has to continue further in order to cope with changing framework conditions. Step 1 has been undertaken a second time in DK and to an extent also in DE (and it has also started in HU). In the food market domain (step 5), one can observe some activity and alternative ways of selling products are being tested in AT and DK. No similar process of redefinition can be observed in CH. Experts do mention the need for debate on the self-conception of the organic farming community, which would mean reconsidering step 1. However, this cannot be reported from CH, and at the same time the organic farming sector has slowed down its development.

If we look at the situation in AT, we find stagnation or even a slight decrease in the number of organic farmers between 1997 and 2003, though the overall number remains relatively high. All of the steps for successful development of the organic farming sector have been completed at least in part. However, the framework conditions for organic farming (such as the institutional setting) are largely shaped by the state and a counterpart on the private side is needed. So far, such a counterpart is lacking. Further development is hampered. At the moment, we can observe that the farming community in AT is starting to reconsider its role by creating an umbrella organisation. But as this process has not yet been completed, the implications cannot so far be assessed.

Thus, our hypothesis is supported by the current situation of the organic farming sector in AT (not developing), and in DK and DE (reorganisation of parts of the sector). The Swiss case may add to the hypothesis, based on the experts' assessments.

7.2 Conclusions on the institutional interrelationships and the development of the organic farming sector

After reviewing the hypotheses established in the introduction to this report, we will now discuss two concepts resulting from the report by Michelsen *et al.* (2001). In chapter 7.2.1 we present the types of interrelationship between institutions as we found them for the year of this study (2003), and in chapter 7.2.2 we will further develop the steps required for successful development of organic farming.

7.2.1 Discussing the concept of cooperation, competition and creative conflict

In this study we relied heavily on the concept of cooperation, competition and creative conflict established by Michelsen *et al.* (2001). In Table 7-2 we assign a type of interrelationship to each domain of the organic sector in the countries studied.

Table 7-2: The interrelationship between organic farming and general agriculture institutions in eleven countries by societal domain

Domain	Organic farming community	General farming community	Food market	Agricultural policy	Institutional setting	Overall evaluation
EE	cooperation at a low level	competition, sporadic cooperation	lacking	competition	lacking	competition
PL	competition	competition, sporadic cooperation	lacking	competition	lacking	pure competition
SI	cooperation	competition, sporadic cooperation	modest/incipient cooperation	competition	lacking	competition
HU	cooperation	competition	modest/incipient cooperation	competition	lacking	competition
CZ	cooperation	competition and cooperation	incipient cooperation	cooperation (potential for creative conflict)	incipient cooperation	cooperation
IT	competition	cooperation and competition	cooperation and competition	cooperation	cooperation	cooperation
EN	creative conflict	competition/creative conflict developing	cooperation	cooperation/creative conflict developing	cooperation/creative conflict developing	creative conflict developing
DE	cooperation	creative conflict	cooperation and competition	creative conflict	creative conflict	creative conflict developing
AT	competition/incipient cooperation	cooperation	cooperation	cooperation	cooperation	pure cooperation
CH	cooperation	creative conflict	cooperation/creative conflict	creative conflict	cooperation	creative conflict
DK	cooperation	creative conflict	creative conflict	creative conflict	creative conflict	creative conflict

Source: Chapters 4 to 6

For those countries studied in an earlier survey covering the years 1985-1997, an attempt is made to draw a comparison in the discussion in order to identify changes in institutional interrelationships and link them to the development of the organic farming sector.

In the CEE countries, cohesion within the organic farming community is sometimes lacking. With the exception of CZ, the prevailing interrelationship between organic and general farming institutions is competition. Cooperation occurs only sporadically and at regional rather than national level. A food market is often lacking or only starting to develop on a cooperative basis. The interrelationship in the policy domain is described as mainly competitive, again with CZ being the exception as it manifests a situation of cooperation. Here, we even find signs of incipient creative conflict. An institutional setting is mostly lacking, and only in CZ does there seem to be some cooperation in this respect. Overall, we find a situation of competition between the organic and the mainstream farming sector in five of the six new EU Member States, which may hamper the future development of organic farming. In CZ the situation is more one of cooperation. According to Michelsen *et al.* (2001), this could again pose a challenge for the further development of the organic sector if the potential for creative conflict (in the policy domain) is not used.

In all countries with an average-sized or large organic farming sector, the interrelationship in the institutional setting and in the agricultural policy domain is described as non-competitive. As far as the interrelationship in other domains is concerned, the situation is more diverse and competition is found in one or two countries. Within the organic farming community, the interrelationship is described as cooperative in three countries (DE, CH, DK) and as competitive in two (AT, IT). In EN, creative conflict describes the internal interrelationship of the organic farming community. The interrelationship with the mainstream farming community is competitive only in IT, whereas in other countries cooperation or creative conflict is found. EN is at a stage where creative conflict is developing out of competition. In the food market domain, both cooperation and competition can be observed in IT and DE, as both integration into the mainstream food market and separate market channels play a role. In the other countries we find cooperation and in some cases (DK, CH) creative conflict.

For the countries included in the earlier study, we will now compare the situations found and discuss changes in the types of interrelation. In EN we can find a development away from competition and in the direction of creative conflict in all domains. The overall evaluation, therefore, changed from pure competition to a developing creative conflict. In IT, a development away from competition towards cooperation can be observed. The food market domain is a good example here and a cooperative institutional setting is starting to develop. In AT, no change in the overall situation is observed; only the internal interrelationship within the organic farming community is changing from one of competition to one of greater cooperation, with an umbrella organisation developing. In DK, the overall evaluation of the institutions continues to be that creative conflict prevails. However, a slight change may be noted in the domain of the institutional setting. Earlier, the creative conflict existing here was dominated by the views of organic farming. Nowadays, the influence of the organic sector has lost some of its importance. This raises the question of whether the situation of creative conflict is in danger of changing to cooperation. It is interesting to look for reasons for such a change. From our survey, we may conclude that it is important to find an issue of conflict in order to maintain conflict. Looking at the countries studied we can see that the issue of conflict in countries at an initial stage of

organic farming development is organic farming itself, but with a growing sector and thus recognition by the state and the mainstream, the importance of this issue dwindles. Creative conflict is then in danger of slowing down to cooperation as an issue of conflict is disappearing. New issues of conflict have to take their place. This view is supported by some statements made by experts who see the ongoing public debate on GMO in agriculture as a chance for organic farming to create a sharp profile and fight for it.

7.2.2 Conclusions on the steps to establish an organic farming sector

If we rely on the assumption that creative conflict is the best type of interrelationship between organic and general farming institutions to support the development of organic farming, it is indispensable that such a conflict, once established, is maintained. In chapter 7.2.1 we concluded that this implies finding issues of conflict. Thus, the six steps for a successful establishment of an organic farming sector as established by Michelsen *et al.* (2001) have to be complemented by another step. This seventh step constitutes the existence of an issue of conflict. It can probably be seen more as an attendant circumstance which is not only favourable but, from a longer-term perspective, indispensable for organic farming development. In Table 7-3 we have extended Table 7-1 to include this seventh step and show for each country whether the step has been partly or fully completed.

Table 7-3: Extension of the steps to establish an organic farming sector

Country	① establishment of an organic community	② political recog- nition	③ financial support	④ positive involve- ment of general farming community	⑤ organic food market	⑥ institu- tional setting	⑦ issue of conflict
EE	●	◐	●	○	○	○	●
PL	●	◐	●	○	○	○	●
SI	●	◐	●	○	○	○	●
HU	●◐	◐	●	○	○	○	●
CZ	●	●	●	○	○	◐	●
IT	●	●	●	○	●	◐	●
UK(EN)	●	●	●	◐	●	◐	●◐
DE	●●	●	●	◐	●	◐	●◐
AT	●	●	●	◐	●◐	●	◐
CH	●	●	●	●	●	●	●◐
DK	●●	●	●	●	●◐	●	●◐

○ lacking ◐ partly completed ● fully completed ●◐/●● repeatedly undertaken

Source: Chapters 4 to 6

For countries at an initial stage, the issue of conflict often is clear: it is organic farming itself that creates conflicts with the mainstream. Consequently, Table 7-3 shows that an issue of conflict is present in all countries with a short history of organic farming (the CEE countries). In countries with an average or large organic

sector, this initial conflict has been resolved to some extent. There are two exceptions to this conclusion. One is AT, where organic farming did not give rise to many conflicts in its initial stages. The second is IT, where the initial conflict seems not to have been completely resolved so far. As soon as the mainstream has accepted organic farming as a realistic option, however, the issue of conflict has to be redefined. This can be by introducing problems (e.g. GMO) for which organic farming may be a solution. This step needs strong involvement and a high level of activity on the part of the organic farming community. As may be seen from Table 7-3, it has not yet been fully completed by any of the countries with a larger organic farming sector. Discussions have started, but have not yet resulted in a redefinition of organic farming's identity.

In accordance with the need for an organic farming community as stated in step 1, it can be added that it may be most effective for the community if the issue is chosen and announced by them in first place, and not brought up by institutions external to the organic farming sector.

7.3 Evaluation of the grouping of the countries

Due to the potential risk of losing information by analysing the development of organic farming institutions, it is necessary at this juncture to evaluate the country group approach used in this study.

First of all, it is obvious that none of the country groups is homogeneous. In each group we find one country where the organic farming sector is developing differently than in the others. The countries were grouped according to the size of their organic sector (in terms of share of organic farms) and the history of its development. From our results, we can see that in group 1 (CZ, EE, HU, PL, SI), CZ stands out, in group 2 (DE, IT, UK) IT shows its own particularities more than the other two countries, and in group 3 (AT, CH, DK) AT is somehow found to be special in several respects. To evaluate the grouping of the countries, we will focus on the main conclusions of the study, which are i) the steps completed on the path of organic farming development, and ii) the types of interrelationship found in the different domains. If it is possible to find these conclusions for the aggregated (group) level, then the grouping would appear to be meaningful.

As it can be seen in chapter 7.2.2, all of the countries that have not fully completed at least one of the steps 4 to 6 belong to the group of new EU Member States. Again, IT is an exception in this context, because the general farming community is not positively involved in organic farming. However, an organic food market is fully established and an institutional setting is beginning to develop, which constitutes the major difference between IT and the group of new Member States. Countries in the group of new Member States all asserted that an issue of conflict between the organic and the mainstream farming sector is present. It is the topic of organic farming itself that creates conflict, and other issues have not so far attained the same level of importance for the conflicting farming communities. Apart from the situation in IT, in most other countries new issues have entered the debate between the organic and the mainstream farming community since the high-level political recognition of organic farming. A special situation was reported for AT, where initially there was no conflict between farming systems. The issue of conflict that is currently gaining importance is – as in the other countries – one from outside the farming sector. Except for HU, all countries that have undertaken some steps repeatedly can be found in the groups of countries with an average or large organic farming sector. All in all, the number of steps completed in the countries studied justifies the choice of

splitting them into a group of new EU Member States and a group of old EU Member States plus CH. It does not, however, satisfactorily justify the distinction between the group of countries with an average organic farming sector and those with a larger one.

To further verify our grouping, we will now look at the types of interrelationship between the organic and the mainstream farming sector. The interrelationship between the organic and the general farming community is competitive in the new EU member countries whereas this interrelation has more of a creative conflict in all other countries except IT and AT, where cooperation (and competition in IT) is also observed. All countries with an overall situation of competition are found in the group of new EU Member States. CZ is the only country in the new Member States group with cooperation at this level of evaluation. However, none of the new EU Member States shows overall creative conflict, which, on the contrary, is the case for most other countries. IT and AT again are the exceptions with a cooperative situation. Those countries where creative conflict is currently developing belong to the group with an average organic farming sector. Countries where creative conflict is further established are part of the group with a large organic sector. Thus, the different quality of overall interrelationship between the organic and the mainstream farming sector allows for a distinction between the group with an average and a large organic sector. When we compare the current institutional interrelationships with those stated in the previous report by Michelsen *et al.* (2001), we notice that important changes have occurred in UK (EN) and IT, whereas no changes in the overall evaluation can be stated for AT and DK. Thus, a certain level of consolidation of the organic farming sector institutions can be seen in the group of countries with a large organic sector, which is in accordance with their lower growth rates in terms of share of organic farms. In the group of countries with an average organic sector, institutional changes have played a more important role and the sector showed more dynamism.

In conclusion, we can state that the grouping of the countries into new and old EU Member States as a first step, and into countries with an average or larger organic farming sector as a second step, is well reflected by the findings of our study. The first partition is mirrored in the different number of steps that have been undertaken. The second can be understood on the basis of the different qualities of institutional interrelationship between the organic and the mainstream farming sector and the different levels of dynamism of institutional development. Although some heterogeneity remains within the groups, they have demonstrated their ability to shed light on the questions raised at the beginning of this report.

7.4 Recommendations for successful development of organic farming institutions

In the previous concluding chapters, we summarised and discussed the results of our study with a focus on the hypotheses established in the introduction, and we considered the role of the state and the private sector for the development of organic farming. We furthermore reconsidered the system of types of interrelationship (cooperation, competition and creative conflict) and extended the concept of a path for successful development of the organic farming sector from six to seven steps. In this section we make recommendations regarding the actions to take to develop the organic farming sector further. It should be noted that Michelsen *et al.* (2001) already concluded their report with policy recommendations that followed the steps identified as a path for successful development. We will therefore not repeat their

recommendations, but seek to complement them with new findings from this more in-depth study. For any development of the organic farming sector, a critical mass is necessary. The sector needs to attain a certain size so that institutions can develop successfully. In the light of this fact, we derive some recommendations from our study for the development of the sector.

We distinguish two phases in the development of the organic farming sector for which we can make recommendations. Phase 1 is the phase of building up, and phase 2 the phase of maintenance of the organic farming sector.

Phase 1

1a. Building up organic farming identity

A well-grounded identity is essential for the organic farming community to build up power in the different domains of society. Only then can the sector develop continuously. Such an identity not only has to be established at an early stage of organic farming development, but it has to be kept alive in the long run. Even though there may be external forces to support the development of the organic sector, a community with a clear identity must be present to make use of such supportive framework conditions. That is, some sort of social movement is necessary to keep organic farming flexible enough to develop. When the organic farming sector has developed beyond its initial stages, it is necessary for the organic farming community itself to start to redefine its position and role. The result is a concentration process where institutions focus on certain activities, and a unification process where institutions working in the same field come together to unify in such a way that synergy effects can be exploited. When framework conditions in any domain change, this process has to be repeated and the organic farming identity thus has to have the potential for continued adaptation. This does not mean giving up its identity; on the contrary, identity has to be the result of self-reflection and debate on the role of the organic farming community.

1b. Building up potential for conflict

On the basis of a robust identity, the organic farming community can be recognised by mainstream institutions of societal domains along the whole supply chain. It is necessary to seek dispute with mainstream institutions at a level that is favourable for serious recognition. If organic farming identity is clearly established, the sector can form a true counterpart and engage in debate with mainstream institutions in the policy domain, as well as in the market domain. Such a debate will promote organic farming development.

Phase 2

2.a Maintaining a climate for creative conflict

Debate between partners that accept and recognise each other may result in an interrelationship of creative conflict. For enduring development of the organic farming sector, creative conflict has to be maintained in the long run. Keeping up creative conflict facilitates adaptation to changing framework conditions. Such conditions may result from a new type of interaction between the state and private bodies, or from changes in the attitude of politics towards organic farming in general. Furthermore, creative conflict is needed to make use of catalysts that bring about change, as mentioned in the discussion of hypothesis no. 4 in chapter 7.1. To maintain creative conflict, the organic farming sector must continuously seize upon

issues of conflict with mainstream institutions. It has to introduce them into the public debate and have a clear position on them. In this way, organic farming identity can be maintained and creative conflict in all domains of society can be kept going.

2.b Institutionalisation of the potential for internal change of the organic farming community

Another aspect of the development of the organic farming sector lies within the sector itself. It must seek to establish an institutional basis so that organic farming is present in all domains of society. It has to be able to coordinate activities so that the sector can act in a proactive way, independent of external influences, and remain capable of adapting to changing framework conditions.

2.c Institutionalisation of creative conflict with mainstream farming institutions

Furthermore, an institutional setting has to be built that facilitates debate between the organic and mainstream farming institutions along the whole supply chain. A climate for debate has to be created in collaboration with disputants from both sides. This goes along with the earlier result that *fora* for discussions are needed. We include this recommendation in our list as it seems to be of importance not only for the institutional setting in general, but also with regard to the need for ongoing creative conflict. It can be seen as the institutionalisation of creative conflict.

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9.2 Annex II: List of key informants

AT Austria

Representative of ARGE Biolandbau

Representative of BMLFUW

Representative of AGES

Representative of LBI

Representative of Die Grünen

Representative of PRÄKO

(former) representative of BILLA- Supermarket chain

CH Switzerland

Representatives of FiBL

Expert on the organic farming sector in Switzerland

CZ Czech Republic

Representatives of PRO-BIO and VUZE

Organic advisors

Representative of the market domain

DE Germany

Representatives of the market domain (Alnatura, Bioland)

Representatives of research (FAL, FiBL Deutschland, Universität Hohenheim)

DK Denmark

Representative of the ministry of food, agriculture and fisheries

Representative of COOP Denmark

Representative of the standing committee on food in the national parliament

Representative of organic farmers and their organisations

Representative of DO

EE Estonia

Representatives of the MoA

Representative of EOFF

Representative of CEET

Representative of SEEB

Representative of EBA

HU Hungary

Representatives of the Ministry of Agriculture and Regional Development: AMC,
Department for Agri-environment

Representative of the Agricultural Chamber for Bács-Kiskun County

Experts from the Institute of Environmental and Landscape Management, Szent Istvan University

Representative of organic farmers' organisations (BA, AHOF, regional Biokultúra Associations)

Representative of the Organic Farming Training, Research and Advisory Association

Representative of the Biokontroll Hungária Public Benefit Company

Representative of the Hungarian Organic Traders' Association

Representative of the Hungária Öko Guarantee Ltd

Representative of the Hungarian Environmental Partnership Foundation

IT Italy

Representative of FIAO

Expert on the organic product market

PL Poland

Experts from Warsaw Agricultural University and Institute of Crop and Soil Science in Pulawy

SI Slovenia

Experts for ISD and Agricultural Institute Maribor

Representative of USOFA

UK United Kingdom

Representative of Soil Association

Representative of Royal Society for the Protection of Birds

Representative of DEFRA

Representative of National Farmers' Union

Expert on organic farming in EN

9.3 Annex III: Guiding questions for key informant interviews

1. General questions over all domains

1.1 Can you identify any public agency or private organisation that originally was not concerned about organic farming (policy), but became active in this field in the years 1997-2003?

We are interested in those private organisations or public agencies for whom development of organic farming was not the main objective; e.g. environmental organisations, political parties, farmers' associations,...

- When did they get active?
- What are their targets?
- What were the driving forces that made them get engaged in organic farming policy? E.g., did the growth of organic farming play a role for their activity?

1.2 Within the years 1997-2003, can you observe any emerging forums for discussion on issues of organic farming policy? E.g. round tables, regular exchange meetings that are institutionalised by now, and others.

Who is taking part in such forums: Public agencies or private organisations, organic or mainstream (or both), others as environmental or societal groups?

- Who initiated the forum?
- When was it initiated?
- What issues are discussed?
- What is the target of the forum?
- What were the driving forces to build up the forum? E.g., did the growth of organic farming play a role?

2. Farming community

2.1 Do you observe an integration of organic farmers into the mainstream institutional system of the farming community within 1997-2003, e.g. farmers' associations, advisory system, research institutions?

What is the positive / negative effect on the organic farming sector?

2.2 Do you observe a segregation of organic farmers from the mainstream institutional system of the farming community within 1997-2003, e.g. farmers' associations, advisory system, research institutions?

What is the positive / negative effect on the organic farming sector?

2.3 How did the organic farming sector institutions develop in the years 1997-2003?

- Did any public agencies or private organisations disappear?
- What was the effect of their disappearance from the political scene?
- Were new ones founded?
- Were umbrella organisations formed? If yes, with what purpose?

- When did they appear on the political scene?
- What was the effect of their appearance on the political scene?

3. Market

3.1 Have (national) state marketing initiatives been created in the years 1997-2003 in order to foster the organic food market?

- Which ones?
- When did they start their work?

3.2 Do you observe an integration of the organic food market into the institutional system of the mainstream food market within 1997-2003?

What is the positive / negative effect on the organic farming sector?

3.3 Do you observe a segregation of the organic food market from the institutional system of the mainstream food market within 1997-2003?

What is the positive / negative effect on the organic farming sector?

3.4 How did the organic market sector institutions develop in the years 1997-2003?

- Did any public agencies or private organisations disappear?
- What was the effect of their disappearance from the political scene?
- Were new public agencies or private organisations founded?
- Were umbrella organisations formed? If yes, with what purpose?
- When did they appear on the political scene?
- What was the effect of their appearance on the political scene?

4. Agricultural policy

4.1 Have changes in the general agricultural policy between 1997-2003 influenced the development of institutions of the organic farming sector?

- What were the changes?
- Who initiated them?
- When did they take place?
- What was the positive / negative effect on the organic farming sector?

4.2 Have changes in the organic farming policy occurred in the years 1997-2003?

- What were the changes?
- Who initiated them?
- When did they take place?
- What was the positive / negative effect on the organic farming sector?

5. Institutional setting

5.1 Have co-operations developed in the years 1997-2003 between organisations of different agricultural sector domains (farming community, food market, agricultural policy) that influence organic farming policy?

- Which organisations are allied?
- What are the targets of the formed co-operations?
- When did the co-operations appear on the political scene?
- What was the reason for their development?
- What was the positive / negative impact on the organic farming sector?

5.2 Have co-operations between organisations broken up in the period of 1997-2003?

- Which organisations were part of these co-operations?
- When did they break up?
- What was the reason for their break-up?
- What was the positive / negative impact on the organic farming sector?

5.3 What were the most important conflicts between institutions of the organic farming policy in the years 1997-2003?

Think of the three domains farming community, food market and agricultural policy!

- On which issues?
- Who were the counterparts?
- What were the reasons for the conflict?
- What was the positive / negative effect on the organic farming sector?

6. Trigger events

6.1 Can you identify events in the time period from 1997-2003 that were crucial for the development of organic farming in your country?

- When did they take place?
- What was their effect on organic farming policy?

7. Individuals

7.1 Are there any outstanding individuals who particularly were of importance for the development of the organic farming sector in the years 1997-2003?

What role did/do they play?