



Republic of Macedonia
Ministry of Agriculture, Forestry, and Water Economy

**NATIONAL STRATEGY
WITH ACTION PLAN
FOR ORGANIC AGRICULTURE
OF THE REPUBLIC OF MACEDONIA
2008 - 2011**

August 2007

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ABBREVIATIONS USED

NSAP—the abbreviated name for the document the draft-version of which is being proposed:
National Strategy with Action Plan for Organic Agriculture of the Republic of Macedonia 2008-2011

MAFWE/МЗШВ—Ministry of Agriculture, Forestry, and Water Economy

ACC/CKK—Advisory Coordination Commission, a body within MAFWE in charge of communication and coordination with all stakeholders in organic agriculture

MEPP/МЖСПП—Ministry of Environment and Physical Planning

ME/ME—Ministry of Economy

NEA/АППЗ—National Extension Agency (Agricultural Development Support Agency)

NPAA—National Program for Acquisition of the Aquis (~ of the *acquis communautaire*); National program for the adoption of legal regulations of the European Union

EU/EY—European Union; **EU-15/EY-15**—European Union of 15 member-states (1995-2003); **EU-25/EY-25**—European Union of 25 member-states (2004-2006); **EC/EK**—European Commission

GDP/БДП—gross domestic product

SME/МСП—small and medium enterprises

OA/O3—organic agriculture

IFOAM—International Federation of Organic Agriculture Movements

NOP—National Organic Program; the USA law on organic agriculture

JAS—Japanese Agricultural Standards; the Japanese law on organic agriculture

GMO/ГМО—genetically modified organisms

SIDA—Swedish International Development Cooperation Agency; the Swedish governmental donor agency

MAASP—Macedonian Agricultural Advisory Support Programme; donation by SIDA

GTZ—Deutsche Gesellschaft für Technische Zusammenarbeit; the German governmental donor agency

SDC—Swiss Development and Cooperation Agency; the Swiss governmental donor agency

SIPPO—Swiss Import Promotion Program; under the auspices of the Swiss Ministry of Economy

SLR—Structural and Legal Reforms project within MAFWE; donation by EU – CARDS 2004

CIHEAM-IAMB—Centre International de Hautes Études Agronomiques Méditerranéennes-L’Istituto Agronomico Mediterraneo di Bari; the International Centre for Advanced Mediterranean Agronomic Studies-the Mediterranean Agronomic Institute of Bari

IMO—Institut für Marktökologie; an international body headquartered in Switzerland which carries out inspection and certification of organic farming, processing, and trade

INCEBO—an international body (closely related to ECAS BV from the Netherlands) which carries out inspection and certification of organic farming, processing, and trade

CIPOZ/ЦИПОЗ—Centre for Research and Permanent Education in Agriculture, an independent organization within the Faculty for Agricultural Sciences and Food in Skopje

FACE/ФАЦЕ—Foundation Agro-Centre for education, an independent organization within the Agricultural Institute in Skopje

FOREWORD

The Republic of Macedonia is undergoing important and rather fast reforms in its agricultural policy in the sense of its approximation to the EU's Common Agricultural Policy (CAP). As a country of great agricultural tradition, as a country with great potentials to produce products recognizable for their quality and origin, we intend to develop the agricultural production by introducing contemporary agricultural policies, also trying to protect and preserve the significantly rich biodiversity as a legacy to the forthcoming generations.

In this context our country makes efforts to introduce and support the form of agricultural production which is the furthest accomplishment of the developed world – the organic production. The experiences of many countries in the world help us understand the permanent values of the organic systems, which provide for the basic principles of sustainable development, social justice, and environment in general.

The perspectives for the development of organic agriculture in the Republic of Macedonia are visible all around us. Having regions clear from industries and pollution, the traditional methods of production based on sustainable use of natural resources, the use of own inputs in production, reduced use of mineral fertilizers and plant protection agents, do confirm the suitability for organic production as a pre-condition. With the assistance from the international community, especially from the EU countries, a number of projects have made significant impact on the producers to learn and implement the internationally adopted principles and standards of organic agricultural production. These perspectives increased and got expanded after presenting our organic production to international events. We become a country favorable for foreign investments, part of which have already been allocated to production and export of Macedonian organic products.

What proved to be necessary was to define a mid-term organic agriculture development policy following the example of the developed European countries, based on capacities, opportunities and market needs. The adopted "National Strategy with Action Plan for the Development of Organic Agriculture in the Republic of Macedonia 2008-2011", elaborated on current situation analyses with the organic agriculture in Macedonia, may seem thin in its size, but its comprehensiveness and the precise development actions may lead to visible and measurable results already next year.

On the other hand, this document sends a clear signal to the donor agencies to actively get involved in the actions aiming at organic agriculture development. Their involvement in the implementations on the some of the proposed actions is important for the accomplishment of the overall objectives.

The Ministry of Agriculture, Forestry and Water Economy, through the all-inclusive support received from the producers and stakeholders who contributed to the development and enhancement of the organic production in the republic of Macedonia, would like to express its gratitude and wish all involved stakeholders a successful work in the forthcoming years of common agricultural development.

Minister for Agriculture,
Forestry and water Economy
ACO SPASENOSKI

1 INTRODUCTION

Organic production supports the rural development in Macedonia. It can contribute to stabilization of eco-systems, preservation of natural resources and development of rural regions. Organic production as well as other integrated agri-environmental practices directly contributes to sustainability of the rural development in Macedonia.

Agricultural and rural development are key elements for Macedonia's pre-accession to the European Union. Following Macedonia's application for EU Membership in 2004, in December 2005 the European Council granted Macedonia the status of candidate country for European Union membership. Negotiations for accession will start only when the European Commission considers that the country has reached a sufficient degree of compliance with the membership criteria.

MAFWE has adopted the following strategic objective as the basis for agricultural and rural development and the formulation of agricultural policy:

To strengthen the ability of Macedonian agriculture to compete in the integrated regional markets of the European Union and south-eastern Europe through measures to increase the efficiency of agricultural production, processing and marketing, and to build appropriate, effective public and private institutions; to improve farm incomes; to ensure that consumers have access to safe, healthy food; to optimize the use of scarce land, forest and water resources, in an environmentally sustainable manner; and to build viable rural communities through sustainable rural development.

The objectives of the NSAP are increasing the organic farming in Macedonia, strengthening cooperation among stakeholders working in the sector, strengthening the federation of organic producers in Macedonia, increasing the knowledge on organic farming of the producers, consumers as well as creation of knowledge which will work on the future development of the organic agriculture in Macedonia.

The NSAP also has the objective to increase the promotion and sales of organic agricultural products both on domestic and foreign markets and to ensure safe and healthy food to the consumers.

This document will be approved by the Government of the Republic of Macedonia at its regular session.

The financial resources for realization of the NSAP is planned to be provided mainly by the State Budget of Republic of Macedonia through its annual programmes for financial support of organic agriculture.

The document has been prepared by the working group nominated by the Minister of Agriculture in accordance of National Programme for the Adoption of *Acquis Communautaire* (NPAA), in cooperation and coordination with relevant stakeholders working in the organic agro-food sector and expertise provided by international projects.

It is envisaged that the implementation of the NSAP will result in increasing the organic agricultural production and processing in Macedonia, increasing supply and demand on organic products, increasing knowledge, research activities in organic agriculture and strengthening the advisory services in the sector, as well as linkages of the stakeholders working in the sector.

2 DEVELOPMENT OF THE NATIONAL ACTION PLAN

The elaboration of the NSAP is in line with the EU integration process as described in NPAA. Accordingly, the Government of the Republic of Macedonia highlighted the importance of agricultural development in the programme of work 2006—2010. In this programme organic products are acknowledged for their potential for export and as a technique to integrate all aspects of environmental protection in agriculture.

MAFWE delegated the task of coordinating the elaboration of the NSAP to its Unit for Organic Production. The Swiss project “Organic Agriculture Development in Macedonia 2005/2008” has facilitated and supported the work.

In line with the white paper on European Governance (EC 2001) which aims at “opening up policy making to make it more inclusive and accountable” the actors and stakeholders of the organic sector and sectors related to organic agriculture are involved in the development of the NSAP. Stakeholders include all individuals, groups or organizations with an interest in organic agriculture on the public as well as on the private sector (for details see Annex 3). The stakeholders commented at all phases of the elaboration of the NSAP.

Table 1. Phases in the elaboration of the National Strategy with Action Plan

Time	Event	Contents
13/14 December 2006	First Workshop: Status Quo Analysis, needs assessment for NSAP elaboration	Workshop with stakeholders of the private and public sector to analyse the Status Quo and elaborate objectives for the NSAP.
December 2006 to April 2007	Elaboration of first draft	The NSAP Working Group comprising of experts from the private and public sector meets regularly to develop the NSAP. Individual negotiations with stakeholders also take place.
24 April 2007	Second Workshop: The first draft finalized.	Workshop with stakeholders of the private and public sector to discuss the first draft and invite proposals for changes.
April to July 2007	Elaboration of the second draft	The NSAP Working Group comprising of experts from the private and public sector meets regularly to develop the NSAP. Individual negotiations with stakeholders also take place.
July 2007	Publication of the first official draft	The first official draft is finalized (in Macedonian and English).
August 2007	Circulating of the draft to all Ministries, Governmental bodies and non-governmental organizations	Invitation to send in comments and opinions; the document is posted on MAFWE’s web site.
August 2007	Meetings in the regions to discuss NSAP	Farmers groups and communities are invited in various regions in Macedonia to discuss the NSAP.
20 August 2007	Public Hearing on the proposed draft NSAP	Elaboration of the final draft on the basis of the feedback from hearings and comments.
22 August 2007	NSAP submitted to the Government of the republic of Macedonia	The document, with comments from the public hearing incorporated in, is submitted by MAFWE to the Government for approval.
September 2007	NSAP is approved by the Government of the republic of	The Government adopted the NSAP at its regular session.

	Macedonia.	
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The final draft was sent for broad consultation among the stakeholders. The stakeholders participating either in the regional or the national Hearing have been asked to rate the suggested actions, i.e. to indicate for the most relevant actions whether they are in their opinion “very important”, “important” or “not important”. The rating revealed high agreement with the suggested action plan. All actions except one achieved an agreement of at least 93 %, one measure (measure 1.4, pilot farms) reached 78% due to concerns regarding an effective implementation of the measure).

Table 2. Actions rated as being very important by at least 50 % of the stakeholders participating in the hearings (72 participants)

Action	Very important	Important	Total agreement
Financial support for organic production area	88%	11%	99%
Development and implementation of a national public awareness campaign for organic production	76%	18%	94%
Re-imbursment of inspection and certification costs to the farmers	71%	26%	97%
Voucher system for advisory services to farmers for organic technology	65%	31%	96%
Co-financing participation of organic operators at national events, exhibitions and fairs	63%	37%	100 %
Increasing the availability of organic seeds	61%	36%	97 %
Improving availability of necessary farm inputs and establishing a list of approved inputs (brands/trademarks)	57%	42%	99 %
Simplification of governmental administration procedures related to organic production	56%	43%	99 %
Establishment of a policy to involve the stakeholders in all activities related to the NSAP	56%	40%	96%
Capacity building on OA for students, experts, farmers, advisors	53%	46%	99 %
Market research of the national (domestic) market, and for selected products of their export markets	51%	47%	98%

Based on the results of the public hearings the proposal was adopted to increase the share of the State Budget to be allocated for “Market Development” and “Education Measures”.

In a final voting at the national hearing 93 % of the participants agreed fully with the NSAP and 7% agreed partly.

A crucial function of the NSAP is the coordination of activities in the public and private sector. The NSAP covers therefore not only the activities implemented by the Ministry of Agriculture, Forestry and Water Economy and financed by the State Budget (from the Agricultural development Support Programme) but also other national programmes with a specific focus on Organic Agriculture and the activities of international donors. The programmes of the international donors, e.g. SDC, GTZ, SIPPO, SIDA, IAMB, SLR play an important role in the development of the organic agriculture sector in Macedonia. Whereas the activities are usually more or less coordinated with the MAFWE, decisions for support programmes and the details are taken by donors and the program periods do not coincide with the planning of the NSAP. Subsequently these activities are only partially reflected in the NSAP.

A lot of activities described in the NSAP have been developed prior or in parallel to the elaboration of the NSAP (e.g. financial support for the organic production area and reimbursement of inspection costs) and are already implemented or ready for immediate implementation. Other actions have been suggested by the NSAP Working Group on the bases of the SWOT analysis and

the stakeholders' feedback to complete the action plan and achieve a comprehensive and consistent set of measures aiming at meeting the objectives defined in the NSAP. These measures are often only briefly outlined in the NSAP and the elaboration of an adequate concept or programme will be part of the implementation of the NSAP.



The effectiveness and success of the NSAP depends on a thorough implementation and continuous adjustment on recent developments. Therefore it is necessary to provide sufficient personnel capacities in the MAFWE to implement and monitor the NSAP and to establish an Advisory Coordination Committee comprising of representatives of the public and private stakeholders to accompany the implementation, monitor and evaluate its effectiveness, and recommend and respectively decide on necessary adjustments.

3 ORGANIC AGRICULTURE IN THE INTERNATIONAL FRAMEWORK

3.1 Historical Development of Organic Agriculture

According to the FAO/WHO Codex Alimentarius guidelines for organic food, organic agriculture is *"a holistic production management system which promotes and enhances agro-ecosystem health, including biodiversity, biological cycles, and soil biological activity. It emphasizes the use of management practices in preference to the use of off-farm inputs, taking into account that regional conditions require locally adapted systems. This is accomplished by using, where possible, agronomic, biological, and mechanical methods, as opposed to using synthetic materials, to fulfill any specific function within the system."*

The first organic farming method has been developed in Europe in 1920s by the Austrian Philosopher Rudolf Steiner as bio-dynamic agriculture. In the mid of the 20 century other organic initiatives grew in various European countries, and in 1971 scientists and farmers founded the International Federation of Organic Agriculture Movement (IFAOM). In 1982 IFAOM published the first Basic Standards for Organic Production and processing which become an internationally acknowledged ground work for certification of organic foodstuffs.

Since mid of the 20th century farmers are farming organically as a worldwide strategy with increasing public support and aiming at achieving sustainable development and protection of the environment on the Earth. In 1991 the EU passed the Council Regulation (EEC) No 2092/91 a Community framework defining in detail the requirements for agricultural products and foodstuffs labeled as organic as an instrument of the European structural policy. In the European Union the number of farmers practicing this production system and the number of consumers buying its food products has grown at a fast pace during the last decade.

In 1999 the Council recognized organic farming in its strategy on environmental integration and sustainable development in the common agricultural policy linking it to the EU structural policies (Programming period 2000-2006), as set out in the Council Regulation 1257/1999 (EEC) on support for rural development from the Agricultural Guidance and Guarantee Fund (EAGGF). The application of the structural policy, which has been implemented until now by EU countries, indicates that it is a specific, more and more important tendency, which will determine the direction of this policy in the next years.

In June 2001, the Commission presented the European Union Strategy for Sustainable Development to the Göteborg European Council. One of the actions identified was that the CAP should reward quality rather than quantity by, for example, encouraging the organic sector and other environmentally-friendly farming methods.

Furthermore, at the Conference in May the Copenhagen Declaration was adopted by signature of the ministers of agriculture across Europe due to the statements that a) organic farming is a highly relevant tool to food production, rural development, environment and animal welfare, b) organic food and farming is becoming a major opportunity for food producers due to the increased consumers interest and c) need for its further development in Europe.

In 2002, the European Parliament and the Council, with a decision for having the Sixth Community Environment Action Program, actions were proposed in view of achieving the objectives of the program that is "to encourage more environmentally responsible farming, including, where appropriate, extensive production methods, integrated farming practices, organic farming and agro-biodiversity." Furthermore European Commission issued in 2002 a document called "Analysis of the possibility of a European Action Plan for organic food and farming", in which it asked the Member States to prepare their own action plans.

Therefore, the EU Council of Ministers of Agriculture adopted at its meeting of 19 June 2001, the following conclusions:

- (1) *Recognize organic farming as one of the ways towards sustainable growth;*
- (2) *Highlights the importance of the Council Regulation 2092/91 of 24 June 1991 on organic production of food products;*
- (3) *Underlines that EU member states have a chance to promote the development of organic farming within the framework of the rural development under the Council Regulation 1257/1999 of 17 May 1999 (recent one Council Regulation 1698/2005);*
- (4) *Recognize the importance of efforts in the area of labeling fodder produced by organic methods and of organic farming controls in animal production;*
- (5) *Emphasized the growing interest of consumers in Europe in organic food products;*
- (6) *Calls upon the Member States, the European Commission and investors to cooperate in the preparation of suggestions for further development of the production, processing and trade in products of organic agriculture in Europe; and*
- (7) *Calls upon the European Commission to analyze the possibility of an Action Plan of the European Union to promote organic farming and food and to present the relevant proposals.*

Finally, the objective of the 2003 reform of the CAP is to support agriculture with a number of underlying principles that can be summarized as follows:

- Economic sustainability, through increased competitiveness, stronger market orientation and more efficient income support (focused on consumers);
- Social sustainability, through more responsiveness to consumer demands, encouragement to improve food quality and safety and a better balance of funding towards rural development; and
- Environmental sustainability, through a clear framework for a more efficient application and development of environmental and animal welfare standards.

Therefore support is focused on environmentally friendly agriculture and on production of high quality and safe food products, that will also contribute to a dynamic development of organic farming. The development of the organic farming sector in the EU is also fully compatible with the Commission's recently announced initiative, the Environmental Technologies Action Plan,

Above mentioned Copenhagen Declaration enhanced the preparation of the European Action Plan for organic food and farming (2004) as a tool to ensure the ongoing development of the organic sector in the Community and also, through this development, to facilitate imports of organic produce from developing countries. It sets out a series of policy measures designed to encourage such a development. The main questions concerned are marketing, the Common Agricultural Policy, standards, inspection and research.

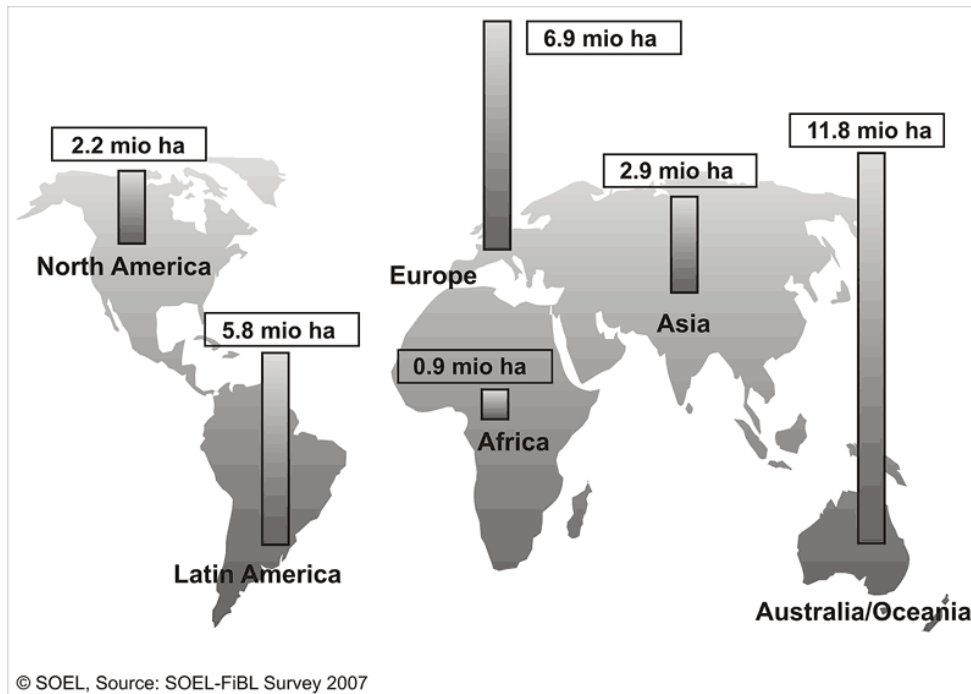
Looking in the future, organic farming is explicitly outlined in the Community Rural Development Policy (Programming period 2007-2013) where improvement of environment and countryside is emphasized.

3.2 Fact and Figures in Europe and Worldwide¹

3.2.1 Organic Farming Areas Worldwide

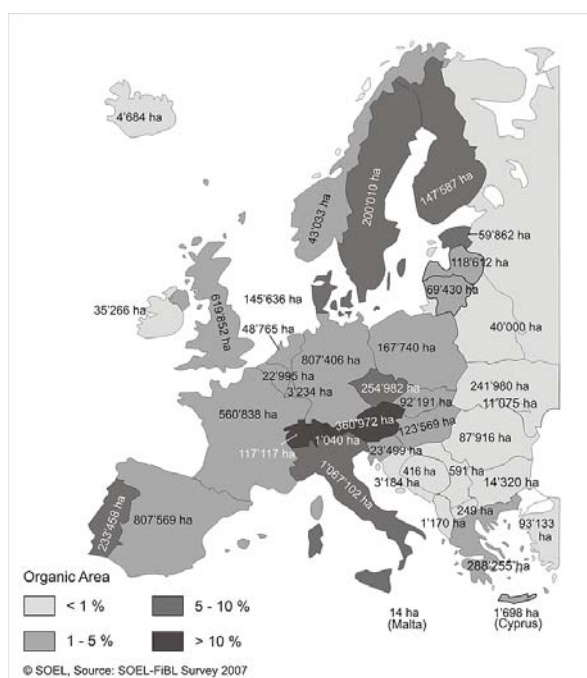
¹ If not indicated otherwise is all data in this chapter from "The World of Organic Agriculture", IFOAM, SÖL, FiBL 2007.

The total World organic farming area was 30,6 million hectares in 2006 presenting 0.7% of the total agricultural land area. With 11.8 million hectares Australia has the largest areas, followed by Europe (6.9 million hectares, out of which 1.1 million ha belongs to Italy) and Latin America (5.8 million hectares, out of which 3.1 millions ha are dedicated to Argentina). North America (2.2 million hectares), Asia (2.9 million hectares) and Africa (0.9 million hectares) are far behind.



3.2.2 Organic Farming Areas in Europe

European organic farming areas were 6.9 million hectares in 2006 (of which 6.5 million hectares in the EU-25) distributed with 23% in the total worldwide organic land and 30% of organic farms. Countries with the largest areas are Italy (1.07 million hectares), Germany and Spain (0.81 million hectares each), the UK (0.62 million hectares), France (0.56 million hectares) and Austria (0.36 million hectares). From the New Member States, significant producers are the Czech Republic (0.25 million hectares), Poland (0.17 million hectares) and Hungary (0.12 million hectares).



The share of organic farming areas within the total agricultural area of the Europe has been 1.38 in 2006 but there are wide differences across countries. Organic farming has the highest shares in Austria (14.2%); Finland (6.5%), Italy (8.4%) and Sweden (6.3%). Non-member Switzerland has also a high share (10.9%).

3.2.3 Number and Sizes of Organic Farms Worldwide

There were altogether 633,891 organic farms worldwide in 2007. Australia, though dominating the total World organic area, has only 1,869 farms – but with an average farm size of more than 6 thousand hectares. The share of organic areas within the total Australian farming area is only 2.68%.

Europe had 187,697 organic farms of which around 160 were in the EU-15 (3.9% of the total agricultural area). Countries with the highest numbers of farms are Italy (44,733 farms), Austria (20,310 farms), Spain (15,693 farms) and Germany (17,020 farms). With 40 hectares, the average organic farm area in the EU-15 is considerably higher than the average size of conventional farms (15 hectares). One explanation to the difference can be differences in product structures.

3.2.4 Organic Markets Worldwide and in EU

World total organic retail sales were estimated at 25 billion EUR in 2005. Global organic food and drink revenues have increased by 43 percent from 18 billion Euro in 2002. The biggest markets are Europe (13 billion EUR) and North America (15 billion EUR).

The biggest national markets in Europe are Germany, the UK, France and Italy. The organic market in the New Member States is much less developed. The combined market size of the ten countries is only 60 million EUR.

The share of organic products in total food sales varies between 1.5 and 2.5 % in the EU-15 while it is as high as 7.5% in Switzerland.

While North America still shows a 16% market growth rate per year since 2002, the formerly spectacular expansion of the organic has slowed down in Europe in recent years. Even so,

the organic market is one of the most dynamic and attractive from all food markets. Annual market growth rates have been around 5% in recent years in Italy, Germany and France but as high as 12% in the UK. Forecasts for the period 2003 to 2007 were UK 11%, France 6.1%, Italy 5.5% and Germany 4.8% (IFOAM).

Organic market prospects are promising also for the future. Some risk factors, however, may limit growth as occasional oversupplies which may have even long-term negative effects; and reduced price premiums which may not only adversely impact profitability but also decreases supply in the longer run.

3.2.5 Certification Services

Today, 395 organizations worldwide offer organic certification services. Most certification bodies are in Europe (160), followed by Asia (93) and North America (80). The countries with the most certification bodies are the US, Japan, China and Germany. Many of the certification organizations also operate outside of their home country. 40 percent of the certification bodies are approved by the European Union, 32 percent have ISO 65 accreditation, and 28 percent are accredited under the US National Organic Program.

4 BACKGROUND IN MACEDONIA

4.1 Importance and Role of the Agricultural Sector in Macedonia

The Gross Domestic Product (GDP) of the Republic of Macedonia has grown in the 2000-2005 period, notwithstanding a drop decline in 2001 due to political instability. In 2005, the GDP stood at € 4.46 billion, or around one percent of the EU-25 GDP. Per capita GDP stands at around 38% of the EU-25. Low standard of living, increasing poverty, high unemployment rate and a relatively low economic growth rate remain central economic issues.

Agriculture (including hunting, forestry and fishery) is the third largest sector after services and industry. In the 2000-2005 period, the share of the agricultural sector in the overall GDP has remained relatively stable contributed around 12% (compared to the 1.6% in the EU-25). If to the formation of the national GDP, agro-processing is included, the percentage increases to 16%.

In 2004 agriculture has provided income and employment to approximately 17% of the national workforce² but the real contribution probably exceeds this percent as according to the latest Census (2002) about 43% of the population, 36% of the labour force, and 44%³ of the poor live in rural areas.

Agriculture is an important contributor to foreign trade. The relative share of agri-food and fishery export in the total trade for the period from 2002-2005 is within the range of 16% to 19% (17.4% in 2005). The country is however a net importer of agricultural and food products which accounted for about 15 % of total imports in 2004-05. The agricultural trade deficit in value terms has been widening in recent years, though a sizeable increase in tobacco and wine exports narrowed the gap in 2005.

The total land area (25,713 km², equivalent to 6% of EU-25 land area, and about the size of Belgium) is prevalently mountainous and intersected by large valleys. Hills and mountains account for around 80% of the land area, with the balance made up of 19% plains and 2% natural lakes.

Soil structures are very heterogeneous (there are more than thirty types of soils) as consequence of the varied natural conditions for the soil creation (topography, climate, flora, geological formation and anthropogenic influence).

In 2006, about half of the total land area is classified as agricultural (1.23 million ha), out of which 537,000 ha (44%) are cultivated land and 688,000 ha (56%) as permanent pastures. The area classified as forestland⁴ is approximately 1.16 million ha (45% of the total Macedonian territory) out of which forests proper are 947,653 ha (37.2 %)⁵.

Agricultural land includes 688,000 ha of pastures (or 55.6%) located mainly in the highlands, and 560,000 ha of cultivated land (or 44.2%) mainly concentrated in valleys. From the total cultivated land, 461,000 ha (82%) was arable land⁶ and gardens, 58,000 ha meadows (10%), 26,000 ha vineyards (5%) and 15,000 ha orchards (3%). Each year, one third of total arable land is estimated to be left fallow. Per capita arable land is 0.625 ha which is higher than the EU-25 average (0.35 ha).

² "Labour force survey, 2004, basic definitions, methods and final results". SSO. Survey made according to ILO methodology.

³ "FYR Macedonia: Growth and Poverty, 2002-2004. Western Balkans Programmatic Poverty Assessment". World Bank.

⁴ According to the Law on Forests (the Official Gazette No. 47/97, 7/2000 and 89/2004), forest land is land covered with forest tree and shrub species, as well as forest bare lands and meadows, forest roads, forest nurseries and other areas that are closely connected to forests.

⁵ "Strategy for Sustainable Development of Forestry in the RM". 2006. MAFWE.

⁶ Arable land includes land planted to annual crops (cereals, industrial, vegetable and fodder crops), nurseries and fallow land.

Cultivated land shows a decreasing trend from 633,000 ha in 1999 to 560,000 ha in 2004, mainly due to land abandonment (rural-to-urban population migration) and urban/industrial developments which occur at the expense of agricultural lands.

Biodiversity in agriculture is of particular importance for the human survival primarily for satisfying the basic needs of food supplies. With the civilization development, humanity continuously creates new species, varieties and breeds with improved characteristics. Especially in the past 50-100 years, modern genotypes are forced for the purpose of intensive production “high investments – high yields”. In this process, many of the old varieties and breeds were unable to survive and are extinct as genetic resources. The indigenous varieties, breeds and types/ species present on the Macedonian territory should be preserved mainly because of the economic, scientific, cultural, social-economic, and environmental interest/benefits.

The main agro-environmental problems identified are:

- Soil erosion is one of the most important environmental problems;
- Water pollution by nitrates and phosphates, pesticides and organic manures caused by agricultural sources are reported in Macedonia;
- Biodiversity loss due to intensification of agriculture;
- Biodiversity loss due to land abandonment;
- Agricultural generated air pollution;
- Environmental problems related to irrigation;
- Soil-related environmental problems;
- Genetic erosion of local breeds and varieties; and
- Impact of the climatic changes on the agricultural production.

4.2 Importance and Role of the Organic Sub-Sector in Macedonia

Organic production in Macedonia is still in an early stage of development. Out of the total area of conventional production in Macedonia, the organic production share is around 0.1% of cultivated area and 0.01% for wild collection.

Organic production has a high potential in Macedonia due to extensive traditional agriculture production, mainly in mountainous areas with extremely good environmental conditions suitable for organic production (more than 50% of total agriculture area). However products of these regions already have a very good reputation among Macedonian consumers. Consumers prefer products from recognized environmental regions which they call “ecological” products (e.g. Berovo cheese and plums, Palanka fruits and potatoes, Ohrid cherries, etc.) due to their traditional connection with the regions. Organic production requires financial resources in the whole production process, and especially in the less developed and most environmental region farmers are not able to pre-finance organic certification costs.

Considering the natural conditions Macedonia has high potentials for further development of organic farming. The objective of the Strategy for Organic agriculture production is to provide medium-term instruments for recognition and utilization of natural resources appropriate for this sub-sector.

Organic farming meets the expectations of the society regarding the environmental protection, production of high quality and safe food with high nutrition value, sustainable management of non- renewable natural resources and adequate concern for animal welfare.

Organic farming is based on the balance of the system: soil-plants-animals-human, and the closed nutrient cycle within the system. No synthetic chemical fertilizers and pesticides, growth regulators and hormones may be used in organic farming. The use of genetically modified organisms (GMO) and their products is also prohibited. Instead, methods based on reasonable and rational use of natural resources are applied, i.e. crop rotation, cultivation of inter crops with nitrogen fixing legumes, livestock manure, green manure and compost, biotic control of pests, diseases and pest resistant crop species, and other techniques.

Organic farming contributes considerably towards ensuring public good, especially towards maintenance of biodiversity and drinking water sources, job creation due to increased labour demand and increased value of the work per product unit, preservation of cultural landscape in the county side and environmental protection.

It would be therefore reasonable for organic farming to take the leading position in drawing up and implementation of other policies as well. Additionally, the Strategy for tourism development is planning traditional organic products to be produced for the purpose of services in gastronomy and catering sector. The Law on Tourism (the Official Gazette No. 62/2004) defines services in ecotourism as visiting regions with special natural characteristics, as well as in protected areas for the purpose of vacation, recreation and site seeing of the natural beauties on a manner determined by law. Tourism services in ecotourism are renting of vehicles for site seeing of natural beauties, selling of natural fruits, describing the natural beauties, photo safari and other services that do not harm the nature on a manner determined by law. The natural conditions in Macedonia (geological content, relief, climate, hydrography, soil, flora, fauna) make it one of the rare countries in Europe with wealth of natural values.

5 STATUS QUO IN MACEDONIA

5.1 Historical Development in Macedonia

1997

- The largest pharmaceutical company in Macedonia has introduced to the market several varieties of organic teas produced from wild collection.

1998

- First activities in the field of organic agriculture in Macedonia were initiated by 4-5 farmers from the region of Ohrid, Kumanovo and Strumica who produced under the organic farming principles for the already secured market.

1999

- Initial expertise has been provided for drafting the legal bases for organic production.

2000

- At the end of 2000 the first draft of the Organic Production Law was prepared with consultation of European experts for organic production.

2001

- Government has adopted the draft Law for Organic Production and passed to the Parliamentary procedure.
- Establishing of the first organic production associations initiated and established.
- In frame of Environmental NGOs Support Program, the “Local Initiatives Support Project towards Organic Agriculture” started.

2002

- An introduction workshop for the importance of associations for organic agriculture and their National Union was organized.
- Regional cooperation in the organic agriculture was promoted through organizing several workshops entitled “Promotion of the Organic Agriculture in the Balkans” for the period 2002—2005⁷.

2003

- As a result of the successful completion of the “Local Initiatives towards Organic Agriculture” a decision was made to start an altogether new project fully dedicated to organic agriculture development in Macedonia.
- Cross-border cooperation in domain of education and training, study visits, and publishing brochures for organic agriculture, with Bulgaria, Croatia, Greece, Switzerland, etc.
- The first 13 organic farmers were inspected.

2004

⁷ The 1st workshop was held in September 2002 in Struga, Macedonia; the 2nd workshop was held in October 2003 in Ribaritz, Bulgaria; the 3rd workshop was held in September 2004 in Mali i Robit, Albania; the 4th workshop was held in October 2005 in Budva, Montenegro.

- The Law on Organic Agricultural Production was adopted by the Parliament in April 2004 (the Official Gazette No. 16/2004) which required furthermore the adoption of 12 by-laws.
- The first by-laws have been adopted in December 2004 to establish an Advisory Coordination Commission on OA. The task of the Commission is to support MAFWE in the development and implementation of the organic agriculture policy and related activities.
- Training was organized for inspection of organic products according to EU Regulation 2092/91.

2005

- The second by-law, the Organic Agriculture Support and Development Programme, was adopted in March 2005 and implemented in the same year. The Programme allocated funds to support 50 certified organic farmers based on land in conversion, inspection and certification costs and laboratory analyses.
- The State Agricultural Inspectorate has been trained for monitoring and supervision in organic agriculture.
- The Fourth General Assembly of IFOAM ABM (Mediterranean branch of IFOAM) and the First International Conference on Soil Fertility and Diversity in the Mediterranean Agro-Eco-Systems were organized in Ohrid, Macedonia. Around 140 participants from 20 Mediterranean countries had the opportunity to exchange experiences and to present their current and future activities in organic agriculture.
- The monograph and guidelines for “Sustainable Use of Medicinal and Aromatic Plants according to the Principles of Organic Production” were published and training for public enterprises and national parks authorities were organized.
- The organic inspection and certifications body “Balkan Biocert” from Plovdiv, Bulgaria, opened its branch office in Skopje.

2006

- Three by-laws regulating the production standards in organic agriculture (plant production, animal production and processing) were adopted⁸ in June 2006 (the Official Gazette No. 60/2006).
- Training on administration of applications for the organic programmes for the NEA staff was organized.
- The Initial Workshop in the frame of the development of the National Action Plan was organized to analyze with the stakeholders the status quo, strengths and weaknesses, and the needs for further development of the organic agriculture sector.
- “Balkan Biocert” Skopje acquired national accreditation for operation in Macedonia.
- The National Federation of Associations of Producers of Organic Products “Biosan” was registered.

5.2 Organic Agriculture Development in Macedonia

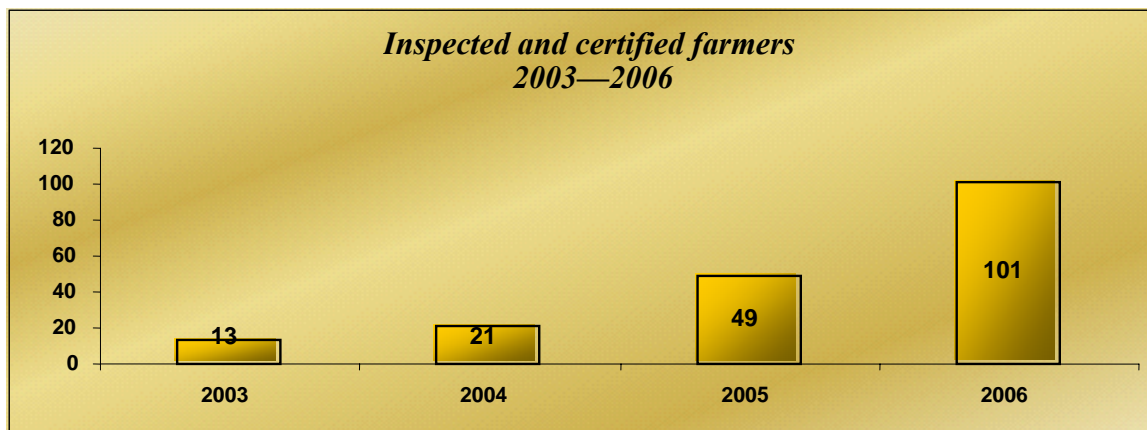
In 2006, in Macedonia 104 operators (clients)⁹ have applied for organic inspection and certification, out of which, 102 farmers have been certified for primary organic production, two companies for processing and one company for trade of organic products. With comparison to the previous year,

⁸ Harmonized with the EU Regulation No. 2092/91.

⁹ Including wild collection companies.

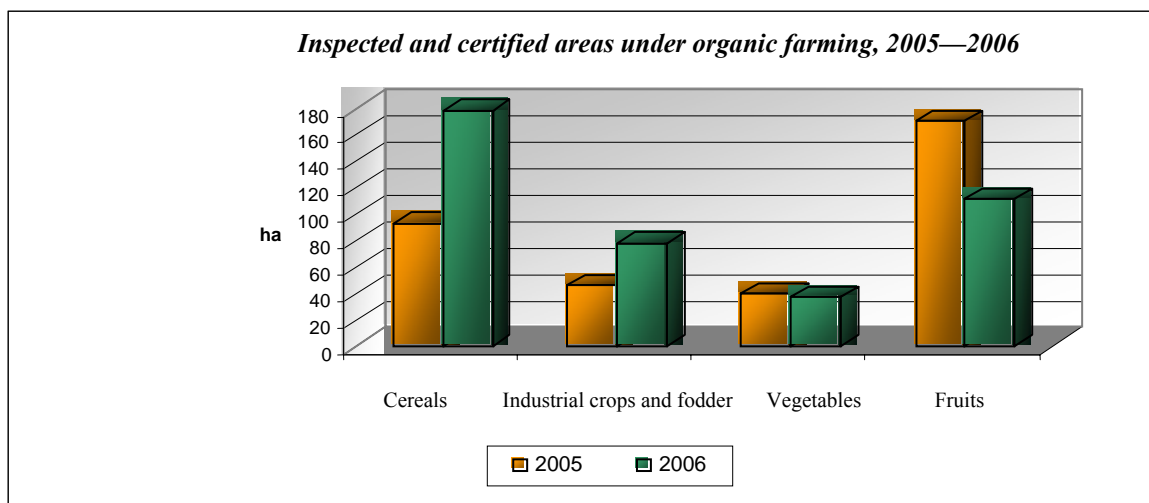
the number of the interest for organic production increased rapidly, showing a growth of more than 100%¹⁰.

Chart 1. Number of inspected and certified farmers, 2003—2006



In 2006, 509.42 ha arable land, including 31 various crops, 505 beehives, were inspected and certified. In comparison with 2005, the total arable area (including fallow land) for organic production increased by almost 33%, while the wild collection area increased by 4%¹¹.

Chart 2. Inspected and certified areas under organic farming, period 2005—2006



The above presented graphic shows that the leading organic crops are cereals representing 44% and fruits representing 27% from the total arable organic certified area¹² in 2006. Certified crops grown on the biggest areas in 2006 are cereals, alfalfa, potato and almonds. Surfaces of each fruit type are less than two hectares, except kaki and almonds. An asparagus and olives emerged as significant new crops and several applicants are interested in growing organic vegetables as cabbages, peppers and carrots.

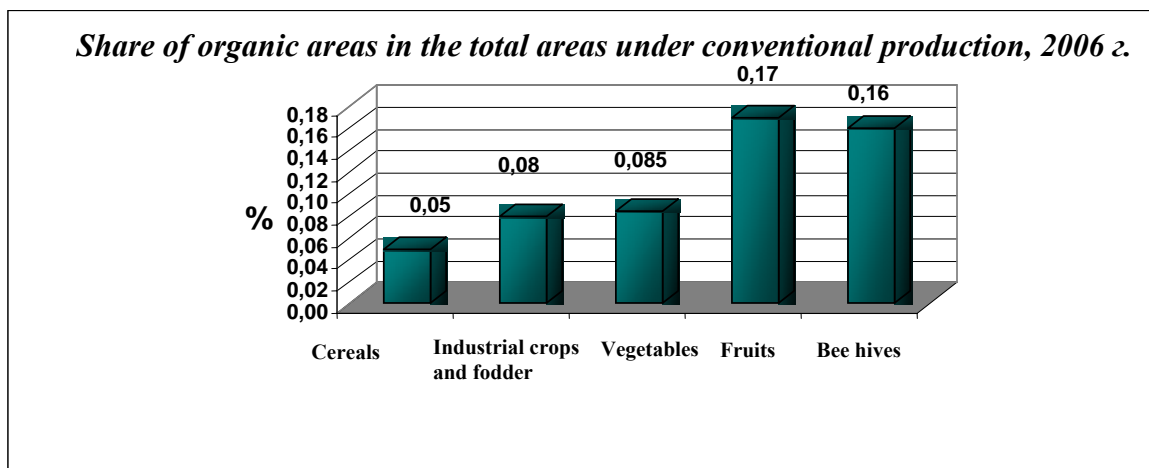
¹⁰ Data source: Balkan Biocert, 2007.

¹¹ Areas of two processing companies in Macedonia operating in processing of wild collection

¹² Not wild collection areas included

The share of organic production in the total conventional production is separately presented on the following graphic. Out of the total cultivated land in Republic of Macedonia, organic farming has a share of around 0.1%. The biggest share of the organic farming has wild collection, representing the approximately 0.1% of the cultivated area and 0.01 % of wild collection under pastures and forests located mainly in the highlands.

Chart 3. Share of organic areas in the total areas under conventional production in 2006

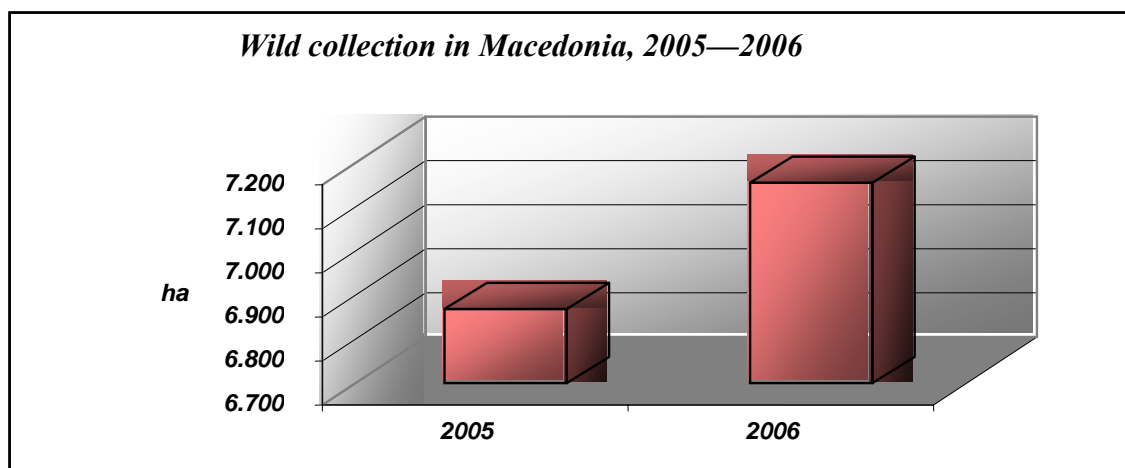


5.2.1 Wild Collection

In 1997, the largest pharmaceutical company in Macedonia was inspected by the Dutch inspection company Skal International. Currently, the collecting regions are located in Berovo covering an area of 876 km², Kičevo with the area of 3206.6 km², Struga with the area of 1023 km² and Kočani covering 461 km². In 2005, the company achieved in addition certification according to US/NOP and JAS to allow for exports to USA and Japan.

In 2005 another company was inspected by Balkan Biosert in the regions of Maleševija, Kriva Palanka and Belasica and certified by IMO for wild collection for 1592 ha in 2006.

Chart 4. Wild collection in Macedonia, 2005—2006



5.2.2 Beekeeping

Beekeeping shows an increasing trend. In 2005 the first two beekeepers with total 110 beehives, whilst in the 2006 6 beekeepers with total 550 beehives have been certified.

5.3 Policy Framework

5.3.1 Strategic Documents

Following policy documents are covering issues related to organic production:

- Stabilization and Association Agreement (2001) – social justice, employment and using of national resources according the sustainable development of the Macedonia.
- Final Draft National Strategy for Agriculture and Rural Development - Status and needs for setting up an agri-environmental policy.
- Strategy for harmonization of the Macedonian agri-food sector EU CAP – laying down the needs for identification of region eligible for organic production and harmonization with EU Regulation.
- Agreement with World Trade Organization (2003) – improvement of international standards for food security and safety adopted by Codex Alimentarius.
- Second National Environmental Action Plan (adopted in 2006) – aiming at mainstreaming of environmental concerns into agricultural development policy and Maintenance of high level basic natural resources essential for sustainable agricultural development. Measures related to aims achievement are a) rational use of natural resources, controlled use of fertilizers and pesticides and promotion, and b) enhancement of organic production and Improvement of monitoring system. Accordingly, establishment of an EU recognized certification system for organic products is defined.
- National Strategy for Biodiversity and Action Plan (adopted 2004) aims to conserve biodiversity and use biological resources in a sustainable manner for the welfare of the people, taking in consideration the unique natural values and the rich tradition of the Republic of Macedonia. In the Strategic approach C for sustainable use of biodiversity, the action for support of agri-environmental programmes is included, with the following activities/projects:
 - stimulate and develop of organic production as a means toward sustainable development (C.2.1.1);
 - stimulate and develop production of cultivated indigenous medicinal and aromatic plants (C.2.1.2); and
 - determine limits (optimal biological thresholds) for the use of biological resources (C.1.2.1).
- National Strategy for Sustainable Development (on going) – MEPP is a coordinating body for realization of the project activities, that will be implemented through the following phases:
 - Phase I – analyzes and assessment of related documents is finished. 11 working groups were established among which are sectoral working groups for agriculture and forestry and cross-cutting support unit for environment, and 11 sectoral reports were produced;
 - Phase II – sectoral strategic planning is ongoing activity; and
 - Phase III – national consolidation.

5.3.2 Institutions Directly or Indirectly Involved in the Implementation of the Organic Agriculture Policies

- Ministry of Agriculture, Forestry and Water Economy, responsible for utilization of agricultural land, forests and other natural resources, organic agricultural production; Department for Agriculture (Unit for Organic Agricultural Production), Department for Financial Support and Rural Development, State Agricultural Inspectorate, Veterinary Directorate and Phytosanitary Directorate.
- Ministry for Environment and Physical Planning, responsible for protection of nature and biodiversity, sustainable use of natural resources, issuing export licence for collection of wild plants, and forest fruits and mushrooms @development of a network of protected areas (strict nature reserves, national parks, monuments of nature etc.); Office of Environment, State Environmental Inspectorate.
- Ministry of Health, responsible for health-care protection and health insurance of the population; observing the health condition of the population, Food Directorate (food inspection).
- Ministry of Economy, responsible for regulating the domestic and foreign trade and consumer protection, State Market Inspectorate.
- Ministry of Finance, responsible for the Custom System and implementing the custom provisions.
- Bureau for Accreditation of Macedonia, responsible for accreditation of bodies for inspection and certification in organic agriculture and organic products.
- Bureau for Standardisation of Macedonia, responsible for technical provisions.
- Bureau for Industrial Property Protection, responsible for registration of the organic product sign.
- Faculty for Agriculture Science and Food, Department for Eco-Agriculture.
- National Extension Agency.
- Accredited inspection bodies for performing expert control in organic agricultural production (Balkan Biocert – Skopje and INCEBO).
- Faculty of Natural Sciences, Institute of Biology.
- Organic Federation “Biosan”.
- Environmental NGO’s.
- Research Institutes.

5.4 Legal Framework

5.4.1 Macedonian Legislation

Following national legislation is providing the legal bases for the organic production:

The **Law on Organic Agricultural Production**, adopted in 2004, regulates the general provisions related to the production, processing, marketing and labelling of organic production and applies to all types of organic agricultural products intended for human consumption and animal

feeding. The Law also provides the basic conditions for inspection and certification of organic agriculture. The reasons for the law are human health protection, biological diversity protection, consumer protection, guarantee of safety, food monitoring and quality.

The by-laws on the Law on Organic Agriculture provide a complete legal framework on the organic agriculture production in Macedonia.

The **Law on Agricultural Development Support** which makes way for annual financial Support Programmes to be established per sectors (agriculture, tobacco, organic production).

The **Law on Environment** has the objectives: preservation, protection, restoration, and improvement of the quality of the environment; protection of human life and health; protection of biological diversity; rational and sustainable utilization of natural resources; implementation and improvement of measures aimed at addressing regional and global environmental problems. Supported are legal entities and natural persons using natural resources through: forests exploitation, by wood cutting; collection and export of plants and parts of plants, branches and other parts of plants; and collection and export of mollusks with and without shells.

The **Law on Nature Protection** regulates the protection of nature by protecting the biological and landscape diversity, and the protection of the natural heritage, in protected areas and outside of protected areas. The protection of nature includes general measures like prohibition of plant protection chemicals for the purpose of protection of habitats and endangered, rare, endemic and relict species and restriction or prohibition of use of natural resource when the favourable conservation status of certain species or habitat types is endangered due to unreasonable use of the natural resource. The protection of wild species is regulated in a way that collection of endangered, rare, endemic and relict species of plants, fungi and their parts shall be conducted upon prior acquisition of license, issued by the Ministry of Environment. Also, trade of endangered and protected wild species of plants, fungi and animals, protected on the basis of international agreements ratified by the Republic of Macedonia, regulated by this.

For the purpose of special protection of wild species MEPP has obligation to prepare Red Lists and Red Data Book of wild flora, fungi, and for the purpose of protection of the biological diversity within the frames of their natural habitats, the system of protected areas (6 categories) shall be established. Except for the first category (strict nature reserve) which main goal is protection of biodiversity, the other 5 categories, in the zone of active management and the zone of sustainable use certain human activities such as such as eco-tourism or traditional extensive agriculture shall be allowed.

5.4.2 EU Legislation

Following EU Regulations govern the organic agricultural production:

Council Regulation (EEC) No. 2092/91 of 24 June 1991 on organic production of agricultural products and indications referring thereto on agricultural products and foodstuffs including all amendments.

Commission Regulation (EC) No. 94/92 of 14 January 1992, laying down detailed rules for implementation the arrangement for import from third countries provided for in Regulation No. 2092/91.

Commission Regulation (EC) No. 1788/2001 of 7 September 2001 laying down detailed rules for implementing the provisions concerning the certificate of inspection for imports from third countries under Article 11 of Council Regulation (EEC) No 2092/91 on organic production of agricultural products and indications referring thereto on agricultural products and foodstuffs.

Commission Regulation (EC) No 223/2003 of 5 February 2003 on labelling requirements related to the organic production method for feeding stuffs, compound feeding stuffs and feed materials and amending Council Regulation (EEC) No 2092/91.

Commission Regulation (EC) No 1452/2003 of 14 August 2003 maintaining the derogation provided for in Article 6(3)(a) of Council Regulation (EEC) No 2092/91 with regard to certain species of seed and vegetative propagating material and laying down procedural rules and criteria relating to that derogation.

5.5 Research

Financial sources of conventional agriculture research have neglected the importance of organic research and should set up new specific criteria for funding research in organic programs. Because of the differences in methods and relevance in conventional and organic farming, the proposals for research in organic farming did not match the existing criteria of research funds. That led to an immediate action to include organic farming among the priorities of sectoral and national research programmes as a field with specific methodological approach.

5.6 Education

The main role of education in organic farming is to increase the level of public awareness, knowledge and information of organic issues among experts, farmers, and other stakeholders in the organic chain.

Organic farming has been scarcely present in the regular national educational system, as the result of which farmers had low level of knowledge about the organic agriculture, and the consumers insufficient understanding of the benefits from the organic food.

In spite of that, some positive initiatives took place in the regular educational system. For example, the concept of organic farming has been introduced into the secondary agricultural schools through practical fieldwork on school training landfields. An Organic Forum was established with two representatives from each agricultural school – the idea is that these teachers become trained in organic farming techniques and responsible for implementation of organic farming activities through practical lessons in the schools. The Forum made sure each school implements particular organic activities which do not overlap other schools, so that all 8 schools together will cover several different aspects of organic farming (composting, vegetable production, grape production, animal husbandry, etc).

Finally, after more than a year of independent work on practical activities in the area of organic production, the Vocational Education Development Bureau, as part of the Ministry of Education and Science, endorsed the introduction of “Organic Agricultural Production” as a facultative subject in the fourth year of education in secondary agricultural schools from September 2007.

On academic level only the Faculty of Agriculture and Food Science has a Department for Environmental Agriculture, which includes some modules related to organic farming.

Simultaneous efforts have been made to institutionalize the non-formal education through establishing CIPOZ and FACE which were founded to develop agriculture including organic agriculture, through strengthening of human capacities.

Non-formal education is a very useful tool in offering a solution of problems in organic agriculture, organic processing and technology transfer to all parties involved in the organic sector. Thus, establishment of educational centres and expert groups within non-formal education are complementary alternatives to formal education.

5.7 Advisory Service

The advisory services are the key element in the organic farming development in the country, taking in consideration that this sub-sector is in the initial stage of its development with great possibilities to be further developed. At the moment, the trainings for organic farming delivered to the advisories are very modest and limited, barring in mind that the short trainings usually are performed in foreign countries with support of international organizations and donor projects (GTZ, CIHEAM-IAMB, USAID, SLR and others). These trainings were delivered to the representatives of:

- Faculty for Agricultural Sciences and Food;
- State Agricultural Inspectorate;
- Research Institutes for Agriculture;
- Advisors of National Extension Agency;
- Independent advisors;
- Representatives of association; and
- NGOs.

MAFWE intends to introduce a voucher system and licensing. The license is a precondition for an advisor to claim advisory service funds. There is on-going pilot project on the introduction of the voucher system.

Multiplicators are an internally developed network of advisors on organic agriculture who operate within the Macedonian-Swiss Project on Organic Agriculture (PROBIO-FiBL). The team of six multiplicators is geographically distributed across Macedonia, and their primary task is to be in day-to-day contacts with the organic farmers with the purpose to:

- Train the framers in organic farming techniques;
- Prepare the farmers for inspection;
- Advise the farmers on current market demands for organic food;
- Identify new farmers to join the organic movement; and
- Elaborate and set up trials the results of which will be used to develop some organic farming techniques specific to Macedonian climatic and other conditions.

In order to extend multiplicator's know-how in organic production, a series of training were conducted. These trainings covered different topics of organic farming: organic fruit production, organic grape production, organic bee keeping, introduction to organic animal husbandry, and also trainings on general principles in organic production, on the existing national regulations and private (commercial) standards for organic farming, on the historical development of the organic movements (IFOAM), etc. Further planned are training on organic vegetable production, organic pest and disease management, etc.

The advisory services are still not enough developed in accordance with the producers needs, particularly for the processors and exporters who call for the consultation in terms of improving their organic production. For the primary organic producer purposes, NEA is providing small advisory packages including general advice for organic production (bookkeeping, plans for production and rotations of crops, soil fertility, usage of seed materials, pests and diseases, etc.).

5.8 Processing and Trade

In Macedonia, there are few processing companies operating in organic industry. Two companies are processing and trading wild collected products and producing for example dried herbs/tea and mushrooms preserved and processed fruits (mostly wild berries) as well as juices, juice concentrate and jams. Most of the production is export oriented, due to the limited local market in our county. Another company is producing vinegar. Furthermore there are some capacities for processing on the farmers level (e.g. honey, juice, bread, essential oils).

5.9 Market Development

Organic production in Macedonia is still not developed sufficiently in volume and diversity as to be able to implement real marketing activities. Most of such activities so far were aiming at national promotion of organic food. In Prilep, Bitola and Rosoman over the past few years, and this year also in Skopje, organic stands were opened on the green markets where organic food was sold under the logo “Tasty Organic Food”. With the purpose to promote the organic food among consumers in Macedonia some events were organized, such as the Organic Day in Strumica. Macedonian organic food was also internationally promoted at the Biofach fair in Nürnberg, Germany. Other activities include selling the freshly squeezed fruit juices in several cafe bars and direct selling of selected products (e.g. honey, bread, fruits) from farmers to supermarkets.

Since there is no continuous supply of domestic organic processed products in adequate quantities it not is possible to set attractive selling points. Furthermore most processing companies are demanding organic raw materials (not in conversion) and they have difficulties to process small and not standardized quantities of organic products. Fresh vegetables and fruits are often sold as conventional since the costs for distribution in the organic supply chain are high and there are limited financial recourses in the primary producer.

A positive example for joint marketing export activity is the organic kaki. The group of organic kaki producers from an association in Valandovo have standardized their product and achieved marketable quantities for export on the EU and Swiss market. In order to be competitive, in the future, the organic producers have to plan jointly and organize better access on domestic and international markets.

5.10 Organic Farmers’ Associations

Back in 2001 organic farmers started organizing themselves locally in civil associations.

In 2003 these local associations joined together in a national organic federation, called Biomak, headquartered in Kavadarci. Soon the federation was joined by trade companies and processing facilities, which were interested in processing and trade of organic food, but also by associations which only declared they intended to do organic production, but had not regulated such an intention legally (with their Statutes, etc.).

Such developments were not welcomed by the farmers i.e. by the producers of the primary agricultural production. Therefore, in July 2006 a new – purely farmers’ and purely organic – federation was registered, the national federation of Associations of Producers of Organic Products “Biosan”, headquartered in Skopje.

At the moments Biosan brings together 8 local organic associations from Valandovo, Gevgelija, Strumica, Pehčevo, Sveti Nikole, Kumanovo, Skopje and Gostivar. It operates on the entire Macedonian territory. Biosan is open to admit new member organizations as long as they can fulfil the minimum criteria for admission – to be registered in court as organic associations (de jure)

and to have in their own membership at least one farmer who has received an organic certificate for their production (de facto).

Biosan's primary role is to guide and coordinate the activities of local organic farmers' associations, according to the Development Strategy of the Federation.

Biosan's activities are mainly focused on:

- Compilation of a general, common and unified data base of organic producers and products;
- Education and training of own advisors;
- Advisory services in organic agriculture;
- Advisory services on utilization of agricultural land on economic, ecological and sustainable principles;
- Marketing of organic products on domestic and foreign markets;
- Establishment of distribution links and common purchase of allowed inputs;
- International cooperation with similar organizations; and
- Educational and training of other clients.

At the moment Biosan is the basic, the biggest and the leading engine of the organic movement in Macedonia. As such, Biosan is in close cooperation with the Ministry of Agriculture, Forestry and water Economy, Ministry of Environmental and Physical Planning, with research and education institutions in Macedonia, and with other relevant players in the sector. Biosan also develops fruitful cooperation with international donor projects in Macedonia dealing with organic agriculture.

5.11 Inspection and Certification

According to the Macedonian law on organic agriculture has the expert control of organic producers, processors and traders to be conducted by registered inspection bodies. These bodies must have headquarters in Macedonia, employ at least three staff persons and be accredited. Until June 2007 two inspection bodies are offering organic certification: Balkan Biocert which has been accredited in 2006 by the Macedonian accreditation institute, and INCEBO, which has applied for accreditation in the field of organic agriculture.

6 SWOT ANALYSIS OF THE MACEDONIAN ORGANIC AGRICULTURE SECTOR

The Working Group on the National Action Plan has elaborated the SWOT Analysis based on the results of the initial stakeholder workshop¹³ and considering the SWOT prepared by Ms Gjongji Kurti SLR Project expert (Competitiveness Study on organic production, June - October 2006).

Table 3. SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Good ecological conditions, clean environment • Traditional farming production for part of agricultural produce • Farmers with long-term experience • Established general institutional system • OA Law adopted and enforced and in line with EU Regulation • Active international cooperation • Initial national support schemes for OA • Advisory Coordination Commission for OA established within MAFWE • Existence of accredited inspection and certification body for produce, processed products and trade • Low cost on labor force • Organic Agricultural Associations are active • Processors and traders visit international fairs and manifestations • Institutional support for organized – associated farmers • OA Competitiveness Study for Macedonia elaborated 	<ul style="list-style-type: none"> • Lack of information on Organic Agriculture on all levels • Farmers have difficulties to meet recording requirements • Limited availability of necessary farm inputs • Insufficient investments and limited financial in OA • Small farmers and companies and scattered production • Lack of client-oriented and trained advisors • Lack of trained and certified collectors of wild plants • Lack of contractual farming • Undeveloped internal market for organic products • Insufficient and not well organized offer of both domestic and imported organic products • Insufficient infrastructure (e.g. storage capacities) • Inconsistent government support and policy • no ongoing environmental monitoring processes and lack of appropriate data on agricultural-related environmental issues (soils, water, biodiversity, landscape) • No connections to tourist offers • Lack of internationally accredited laboratories

¹³ See report from the first workshop on the National Action Plan in Macedonia held on 13. and 14.12.2007 in Ohrid.

Opportunities

- Favorable climatic and soil conditions
- Conventional production with minimum use of protection agents and mineral fertilizers
- Increasing interest for organic production in Macedonia
- High demand for organic products in Western Europe and US
- Higher prices of organic products compared to conventional ones
- support for OA by international donors
- Institutional for OA
- Revitalization of abandoned areas, with potentials for OA development
- Rural development strategy is in favours of OA development
- Natural resources and traditional methods for organic animal production
- Favorable conditions to develop eco-tourism

Threats

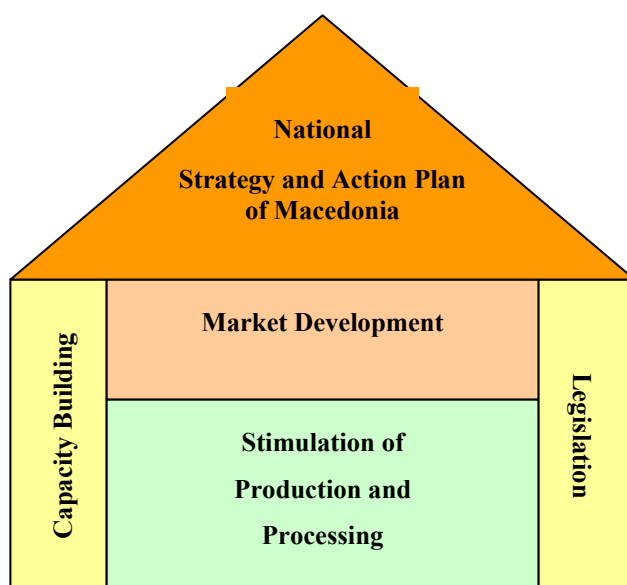
- Little demand for organic products on national market
- Slow development of OA and opportunities for access to international markets
- Greater competitiveness of foreign organic products
- Limited budget funds to support OA
- Increased administration obligations without adequate advisory support
- Increased costs for inputs and services, i/c costs, reproduction materials
- Low financial power and capacities of processing industry to finalize the organic produce
- Complete orientation towards export markets
- Reduction of OA subsidies compared to subsidies in conventional production

7 STRATEGIC GOALS OF THE ORGANIC AGRICULTURE IN MACEDONIA

7.1 Strategy

Organic agriculture in the Macedonia is yet in an initial phase: five years ago, the first farms have been certified, the number of farms had considerable growth over the years due to public and private support programmes but yet the total amounts produced per crop are small. In 2007 new farmers were reluctant to decide for conversion following to the interruption of the governmental support program in 2006. A major incentive for the farms for conversion would be better marketing opportunities and premium prices for the products. But the market for organic products on the national level as well as for exports is also in its initial state and the lack of sufficient quantities, consistent qualities and infrastructure limit and hamper the market development. There are single initiatives for selling organic produce locally but yet there is little demand and little knowledge about organic agriculture among consumers. It is a vicious circle: there is not sufficient market for organic products to stimulate conversion on the one hand and on the other hand market development is hindered by the lack of quantity and quality. It is therefore necessary to push and pull the market development at the same time i.e. to support the production level as well as the demand side and to increase awareness for organic agriculture on all levels – from the farmer to the consumer.

In the support measures focus shall be given to stimulation of production since market development requires a minimum of quantities, quality and range of products on offer. Second priority are tools to stimulate the market development. This includes awareness creation especially on the national level and profesionalization of the export activities. These activities are supported by measures for capacity building and support measures for cooperation and networking in the organic sector and between the private and the public sector and harmonization of the legislation. For the development of concepts of the individual actions priority shall be given to selected crops typical for Macedonian production with a potential to meet consumer demand on the national level and to compete on the international level.



A pre-condition for a sustainable development of organic agriculture is a continuous and consistent support for organic agriculture in Macedonia and on the long-term a sustainable

development of the market. The adoption of the NSAP is a first step towards a middle-term policy support for organic Agriculture.

The NSAP needs therefore to be adapted by the Government of the Republic of Macedonia. On the basis of the governmental decision and supported by the Advisory Coordinative Committee an effective vertical and horizontal coordination and collaboration among institutions and non-governmental organizations shall be ensured. This includes also good contacts with EU Member States and exchange of experience and know-how as well as cooperation with international organizations such as IFOAM.

The support programmes of the international donor organizations contribute considerably to the fruitful development of OA, the NSAP aims to coordinate public and private support. The State Budget for Organic Agriculture shall focus on the key measures and those measures not supported by donor organizations.

Table 4. Prioritization of the NSAP measures – assessment by the NSAP Work Group and selected stakeholders

	1	2	3	4	5	6	7	8	9	10	11	Просек
Production (farming, wild collection)	35	30	30	20	40	40	40	50	20	50	20	34
Processing and Trade	10	25	15	10	15	15	15	10	20	25	20	16
Market development (national and export)	25	30	30	30	25	25	25	20	20	10	40	25
Research and Education	20	10	15	20	10	15	12	10	20	10	10	14
Policy, Legislation and Inspection	10	10	10	20	10	5	8	10	20	5	10	9
Total	100	100	100	100	100	100	100	100	100	100	100	100

7.2 Strategic Goals

Following the above mentioned documents and situation in Macedonian agriculture and specifically in organic agricultural sector and its future development, Macedonian strategic goals are defined towards:

1. By 2011 the organic area share of the total cultivated agriculture area of Macedonia is 2 %.
2. By 2011 the share of the organic wild collection area is 5 % of total agriculture area in Macedonia.
3. By 2011 the majority of the consumers in Macedonia have basic understanding of organic agriculture, and there is a national demand for organic products;
4. By 2011 stable export relationships are established.

The above mentioned strategic goals are going to be achieved following the specific objectives and measures in the field of production, processing and trade, market development, education, research, and policy, legislation, and inspection.

7.3 Specific Objectives

7.3.1 Farming Production

1. To increase organic farming area and animal production;
2. To increase wild collection area;
3. To produce sufficient quantities and assortment of organic products;
4. To improve availability of organic farming inputs; and
5. To strengthen farmers' organizations and to support farmers' co-operations and networking.

7.3.2 Processing and Trade

1. To increase the supply and assortment of processed organic products;
2. To increase the number of processing companies; and
3. To increase know how of companies for technology of organic processing.

7.3.3 Market Development

National market

1. To increase market transparency;
2. To increase public awareness and recognition and visibility for Macedonian organic products;
3. To increasing sales of organic products; and
4. To stimulate ecotourism development with organic products.

Export market

5. To increase sales of Macedonian organic products on export markets; and
6. To increase the knowledge on export markets and competitiveness of Macedonian organic products.

7.3.4 Education

1. Organic agriculture to become part of the regular education (high agriculture schools, universities);
2. To increase knowledge on organic agriculture among stakeholders; and
3. To establish continuous cooperation in education for OA on international level.

7.3.5 Research

1. To initiate research on organic agriculture techniques in Macedonia;
2. To initiate research on natural resources potential in Macedonia;
3. To initiate market research; and

4. To coordinate the work among scientific institutions and projects on national and international level.

7.3.6 Policy, Legislation and Inspection

1. To harmonize the national legislation international legislation, especially with EU regulations;
2. To secure consistent support policy for organic agriculture;
3. To build capacities for institutions involved in organic system (knowledge, human resources, infrastructure);
4. To implement the organic control system effectively;
5. To increase cooperation and communication among all involved parties;
6. To use of natural resources in the field of wild collection sustainably; and
7. To implement the NSAP effectively.

8 ANNEXES

Annex 1: List of Actions

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
	1. Objective – Farming Production							
	<ol style="list-style-type: none"> 1. To increase organic farming area and animal production; 2. To increase wild collection area; 3. To produce sufficient quantities and assortment of organic products; 4. To improve availability of organic farming inputs; and 5. To strengthen farmers' organizations and to support farmers' co-operations and networking. 							
1.1	1, 2, 3	Financial support for organic production area.	Medium-term program with defined measures creating a support program based on the value of organic compared to conventional production. Activities covered: plant production per hectare, wild collection per collection center, animal per head, bees by bee hives. There should be a difference between in-conversion farms and fully organic farms. Eligibility: definition of minimum area per farm except for farms which are fully converted, definition of maximum area, supported.	Market is not well developed and farmers need incentives to convert to OA. On the other side the production is too low to develop the market. Lower yields especially during conversion period must be compensated.	2008-2011	State budget for OA	MAFWE and local branch offices of governmental institutions	Total share of organic agriculture area is 2 %.
1.2	1, 2, 3	Re-imbusement of inspection and certification costs.	Maximum 50 % of the total inspection and certification costs are refunded to the producers.	Farmers do not yet achieve premium prices for organic products. Extra costs for inspection are therefore a barrier for farmers to convert to Organic Agriculture.	2008-2011	State budget for OA	MAFWE and local branch offices of governmental institutions	Total share of organic agriculture area is 2 %.
1.3	1, 2, 3	Financial support for organic production area in protected areas.	Under the Environmental Investment Programme, protection and biodiversity projects including organic farming are eligible and subjects for its approval according to the project justification (subsidies per collection point and organic area).	National parks are most suitable for OA and wild collection. The Law of Nature Protection from 2004 allows traditional farming and eco-tourism in protected areas. Lack of activities in the protected areas in regard to the sustainable use of the natural resources. Need to support investments in the protected areas.	2008-2011	Program for support of investments in protected areas	MAFWE and MEPP	20 % of the land suitable for wild collection and production in protected areas is certified.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
1.4	1, 2, 3, 5	Establishing a net of pilot/demonstration farms.	Establishing a system of leading organic farms in the regions for education and training purposes (private farms are selected and registered and supported). Biosan is involved in setting the selection criteria to define the leading crops* and processes.	Technical knowledge on organic production needs to be increased. Farmers prefer learning from other farmers. They want to see practicability of organic farming system and exchange experiences.	2008-2011	Donors and State budget for OA	MAFWE in cooperation with Biosan	A sustainable net of pilot farms for selected crops has been established according defined criteria.
1.5	1, 2	Voucher system for consulting services for organic technology advice to farmers.	Part of general voucher system planned by MAFWE and SIDA which shall also cover organic production.	Organic production requires specific technical knowledge. By establishing a voucher system farmers can select the consultant of their choice. Such a system supports the development of an efficient local extension service.	2008-2011	Funds from Ministry of Agriculture and SIDA	MAFWE, MAASP	Number of advice services requested by organic farmers.
1.6	4	Establish a database on the availability of organic seeds, propagation material and seedlings.	Establishing a database which indicates the availability of organic seeds and propagation material (varieties, company details, duration of availability). This tool can be further developed at a later stage for issuance of authorizations for use of conventional seeds as requested by EC Reg. 1452/2003.	According the EU Reg. organic seeds should be used. The request for organic seeds shall be increased by increasing the transparency on the market. This is a measure which is requested under EC Reg. 1452/2003.	2008-2009	State Budget and Donors	MAFWE	Propagation material of kaki, kiwi, pomegranates is predominantly from organic sources. For the main crops organic seeds produced in Macedonia are available used.
1.7	4	Financial support for organic farmers for production of approved organic seed material.	Extra costs for farmers for declaration of seed and propagation material shall be compensated.	It is necessary to use organic seed and propagation material to meet EU requirements. Yet there little production in Macedonia and imported material is expensive. Legal procedures for certified seeds are expensive.	2008-2011	State budget, donors	MAFWE Seed and Seedling Directorate Unit for organic agriculture production	Propagation material of kaki, kiwi, pomegranates is predominantly from organic sources. For the main crops organic seeds produced in Macedonia are used.
1.8	4	Facilitating import procedures for inputs needed in organic production.	Facilitating import procedures for organic inputs. e.g. by accepting approval procedures of selected European countries and by reducing costs for registration.	The procedures for importing inputs (license system) are complicate and expensive. Therefore there is a lack of adequate inputs for organic production.	2008-2011	MAFWE, donors	MAFWE, support by external expertise	For the most important crops adequate plant protection and seed and propagation is available.

* Leading crops shall be defined by the NSAP advisory coordinating committee considering production and market potential in Macedonia and abroad.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
1.9	4	Analyzing the necessary farm inputs and establishing a list of approved inputs (brands).	Analysis of availability of farm inputs in Macedonia (plant protection material, fertilizers, veterinary medicine, feed material, cleaning agents...) and strategies to offer these products shall be elaborated in collaboration with MAFWE. A list of available approved inputs shall be published and continuously be updated.	Lack of adequate farm inputs for organic production. The legislation only indicates approved substances, not the label products.	2008-2011	SDC (2008), State budget for OA	Biosan	For the most relevant crops adequate inputs are available.
1.10	5	Financial and technical support for the national federation of organic producers.	Capacity building and contribution to running costs to establish a professional farmer's organization. Provided services: support of marketing, consultancy for farmers, training.	The organic farmer's federation is necessary to represent interest of farmers, for joint marketing activities as well as establishing an extension service and training of advisers specialized in organic agriculture.	2007-2008	SDC (2008)	Biosan	A stable farmer's federation is established. Services of federation are demanded.
1.11	1, 2	Generating specific knowledge for adequate post harvest procedures.	Analyze the deficiencies in organic post-harvest procedures and building capacities for adapted Macedonian approach through study visits, expert support and workshops.	There is not sufficient information on organic post-harvest treatments e.g. for ripening of kaki	2008-2011	Donors	Biosan, projects	Selected* organic products meet quality requirements from the market.
1.12	4	Co-financing of packaging material.	Financing of extra costs arising because of specific requirements from organic standards and the buyers.	Adequate packaging material is hardly available in Macedonia and very expensive (problem of extra costs because of little amounts, specific requirements on material to meet organic standards and expectations of export markets).	2008-2011	Donors and State budget for OA and/or IPARD	Projects, MAFWE	Selected* products adequate packaging material is used.
1.13	5	Publishing an organic farming journal.	Regularly published magazine informing about the development of OA in Macedonia and abroad (e.g. production techniques, research results, marketing activities, organizational development). In printed version until majority of farmers have regular internet access.	A farming journal is an important tool to increase transparency and knowledge in the organic farming sector.	2009-2011	Donors and state budget of OA	Producers federation	A magazine published at least four times a year.

* Leading crops shall be defined by the NSAP advisory coordinating committee considering production and market potential in Macedonia and abroad.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
2. Objective – Processing and Trade <ol style="list-style-type: none"> 1. To increase the supply and assortment of processed organic products; 2. To increase the number of processing companies; and 3. To increase know how of companies for technology of organic processing. 								
2.1	1, 2	Co-financing of certification costs (storage and processing).	Certification costs shall partly be refunded (based on percentage of costs with a defined upper limit).	It is necessary to increase the capacities for processing and storage. Certification costs are a barrier for new companies and start ups.	2007-2011	State budget for OA	MAFWE	15 certified processing companies.
2.2	1, 3	Voucher system for consulting services for organic technology advice to SMEs for processed organic products.	Establishing a voucher system concept and pilot and advisory package for SME's for organic technology advice, this might also include foreign experts.	Processed organic products require introduction of appropriate new technology. Implementation of a voucher system also allows development of local consultancy services.	2008-2011	ME, SIDA	ME, MAFWE,	15 certified processing companies.
2.3	1	Annual award for best new organic processed product:	An expert committee selects most innovative organic product of the year. Selected company receives an award and is promoted in media, e.g. organized by chamber of commerce/association of consumers.	Incentive for processing industry to introduce new products with good market potential.	2009-2011	State budget for OA or donors	MAFWE, donors	3 new innovative products per year.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
3. Objective – Market Development <u>National market</u> 7. To increase market transparency; 8. To increase public awareness and recognition and visibility for Macedonian organic products; 9. To increasing sales of organic products; and 10. To stimulate ecotourism development with organic products. <u>Export market</u> 11. To increase sales of Macedonian organic products on export markets; and 12. To increase the knowledge on export markets and competitiveness of Macedonian organic products.								
3.1	1	Central Organic Farming Internet portal for organic products.	Creation of web side with information of OA. Dissemination of information among stakeholders and consumers; Increase market transparency.	Access to relevant market information must be facilitated. This is a pre-requisite for successful operations in the market.	2007-2011	SDC (2008), other donors	Biosan	Website is established with at least 50 visitors per week from 2008 onwards.
3.2	2	Development and implementation of a National Public awareness campaign for organic production.	Introducing the concept of organic farming to all stakeholders. The most relevant target groups and the measures suitable for the available budget shall be elaborated in the concept.	There is little knowledge about organic agriculture and its advantages on the level of consumers and producers.	2008-2011	State Budget on OA and donors	MAFWE, projects	20 % of the consumers recognize organic products.
3.3	2	Revision of organic logo.	National logo shall be revised in order to be clearly distinguishable to other logos. Process of selection of new logo shall include organic sector.	Stakeholders reject organic logo because of risk of confusion with similar logos for competitive products (e.g. indication of origin). The EU also decided to revise EU logo because of similar problems.	2008	State Budget, donors	MAFWE	State logo is revised in agreement with the organic sector.
3.4	2	Organizing Organic Food days.	Events in regions with participation of the organic sectors targeted to the local communities to introduce organic agriculture.	Little awareness of organic agriculture on the community level.	2008-2011	SDC (2008), other donors	Biosan, projects	In 2008 20 farmers sell their products, with a 50 % growth per year.
3.5	2, 3	Co-financing participations of organic operators at national events, exhibitions and fairs.	Co-financing of fees, promotion material, construction of stands.	Lack of promotion of organic products on national market	2007-2011	State budget of OA, donors	MAFWE, projects	Continuous presence of organic suppliers in relevant national fairs and exhibitions.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
3.6	1, 2, 4	Publishing guides and directory (e.g. tourist guides, shopping guides etc) for organic farms and their products.	Brochures, maps or websites which indicate offer of organic products to increase the interest of consumers to visit organic farms and also publication of a directory for organic providers.	Yet it is difficult for local consumers and tourists to find organic products. It is necessary to bundle information to be more interesting for consumers.	2008-2011	Donors and State budget of OA	Projects, MAFWE	Selling points for organic products in Macedonia are listed in adequate guides or directories. Adequate turnovers regarding on-farm sales.
3.7	5	Financial support for organic producers and processors for export promotion of Macedonian products.	Co-financing of costs for attendance of international fairs, events etc. (e.g. preparation of presentation, costs for promotion material, fees, transport, construction of stands). Advertisements in international magazines. Joint activities shall have preference for support.	Export promotion activities are yet very weak and Macedonian organic products are not known on target markets.	2007-2011	SIPPO, other donors, State budget of OA	Projects, MAFWE	At least 5 new export contracts per year. Selected products are offered on BioFach and SANA by Macedonian suppliers.
3.8	6	Providing information about export procedures and markets in selected countries.	Compilation of information and publication on website or manuals.	Especially for SMEs it is difficult to gather information on export markets since the information is usually in foreign languages and information gathering is very time consuming.	2008-2011	Donors	MAFWE, ME, donor Projects	Information is available and updated for the following markets: EU in general and specifically DE, UK, NL, SL, SE, IT and CH, US, Russia.
3.9	1, 3, 6	Market research on domestic markets as well as for selected products in export market.	Market study to select suitable export products for targeted markets including assessment for identification of leading crops in action 6.0. Preparation of a study for identification of the target group profile of consumers of organic products in Macedonia; identification of adequate products and measures for efficient and effective informing of the target group; and optimum distribution channels.	Knowledge of the market is a prerequisite for successful market development. The nature and the novelty of organic products in Macedonia (which are interesting only for a certain group of consumers) require specific studies. All marketing measures, especially the public awareness campaign should be based on such results.	2008-2011	Donors and state budget of OA	Projects, MAFWE, ME	Clear profile of target group and identification of products with best potential for national and export markets.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
4. Objective – Education								
1. Organic agriculture to become part of the regular education (high agriculture schools, universities); 2. To increase knowledge on organic agriculture among stakeholders; and 3. To establish continuous cooperation in education for OA on international level.								
4.1	1	Developing curricula in OA for agric. faculties and high agricultural schools. Training of teachers, provision of suitable literature.	Offered as optional, compulsive or as a facultative subject and studies on adequate fields for those students who want intensive education in organic farming.	Capacity building is needed in all levels.	2007-2009	SDC (2008), other donors	Centre for Professional Education and projects	Curricula and training materials are developed
4.2	1, 2, 3	Practical education by study visits in institutions abroad.	Financing and coordinating of study visits for Macedonian experts on private and public sectors.	Experts and multipliers shall be updated with latest development and learn from practical experience abroad.	2008-2011	Donors	Organic farmers federation, projects	50 experts and multipliers have conducted study visits in countries.
4.3	2, 3	Student exchange in the field of OA.	Provision of on-farm students training in leading institutes and farms abroad.	Creation of nucleus of young professionals familiar with the day-to-day OA practices.	2008-2011	Donors, IAMB	IAMB, Universities, high schools, projects	10 students have been part of exchange programs per year.
4.4	2	Financial contribution for non-formal education.	Seminars and courses for practicing and potential organic farmers and collectors as a supplement to their regular professional training. Technical training for producers in selected areas of organic production. Specifically targeting young farmers.	Non-formal education is at initiative phase in Macedonia and needs support. Lack of technical knowledge expertise in OA.		State Budget or OA, MAASP and donors	FACE, Biosan, projects	200 participants per year with an increase of 50 % in subsequent years.
4.5	2	Establish a certification system for OA advisors.	Elaboration criteria for qualification of advisors and establishing an approval system.	Assurance of qualified organic agriculture advisors.	2008-2009	Donors	MAFWE	A list of certified qualified advisors is published.
4.6	2	Development of technical manuals and guides on OA.	Provision of the guidelines addressed to all parties involved in the organic sector.	Lack of technical knowledge expertise in OA.	2008-2011	State Budget IAMB, SIPPO, GTZ, SDC (2008), MAASP	FACE, Biosan, NEA	Guides in the relevant fields exist.
4.7	2	Qualification of advisors in the field of organic agriculture.	Capacity building for advisors on the public (NEA) and private sector assuring long-term qualification.	Lack of technical knowledge expertise in OA.	2008-2011	SIDA, SDC (2008)	MAASP, NEA, MAFWE, BIOSAN, FACE	Qualified advisors are available for conversion to OA and for technical advice especially for selected* products.

* Leading crops shall be defined by the NSAP advisory coordinating committee considering production and market potential in Macedonia and abroad.

Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator	
5. Objective – Research								
<ol style="list-style-type: none"> 1. To initiate research on organic agriculture techniques in Macedonia; 2. To initiate research on natural resources potential in Macedonia; and 3. To coordinate the work among scientific institutions and projects on national and international level. 								
5.1	1, 2	Initiation research on selected organic topics in national and sector research programs.	Establish a forum to elaborate a concept for organic agriculture research. This forum should include farmer's representatives, advisors and national research institutes and consider national research as well as the activities on the demonstration farms.	Conventional agriculture research has neglected the importance of organic research on a national level.	2008-2011	State Budget on OA, SDC (2008)	Project in cooperation with MAFWE and Biosan	Research concept indicating the necessary fields of activities is defined. At least 3 trials are established.
5.2	1, 2	Initiate research and demonstration centre for organic farming.	On long-term a centre specializing on research and application of organic agriculture shall be established. This could be a an existing institute specializing on OA.	It is necessary to develop a local approach for organic farming research.	2010-2011	State Budget on OA, donors, governmental programs	MAFWE, farmers associations	First centre is established.
5.3	3	Organization of regional scientific congresses on OA in RM.	Initiate a scientific congress focusing on South-Eastern Europe.	Scientific Congresses on OA will increase experiences exchange among researchers and scientists and will increase the cooperation on the regional level.	2010-2011	Governmental programs, Agricultural Institutes, Faculties	Has to be identified	Congress is organized.
5.4	3	Supporting linking up with European research and participation in existing networks (IFOAM, EU networks).	Financial support for participation in conferences, scholarships for PHD-students, sabbatical of professors in universities and research institutes.	Cooperation and networking is needed to catch up with European research level.	2008-2011	IAMB, other donors	Projects	Macedonia is present in all relevant European organic research conferences. Students and professors regularly work for limited time periods in European research centers. Macedonian experts are member of international committees.

Objec tive	Action	Explanation / Description	Justification	Time- frame	Source for budget	Implements	Indicator	
6. Objective – Policy, Legislation & Inspection								
<ol style="list-style-type: none"> 1. To harmonize the national legislation international legislation, especially with EU regulations; 2. To secure consistent support policy for organic agriculture; 3. To build capacities for institutions involved in organic system (knowledge, human resources, infrastructure); 4. To implement the organic control system effectively; 5. To increase cooperation and communication among all involved parties; 6. To use of natural resources in the field of wild collection sustainably; and 7. To implement the NSAP effectively. 								
6.0	2, 7	Identification of leading crops	<ol style="list-style-type: none"> 1.) Identification of crops where Macedonia is strong in production (quantity and quality 2007) 2.) Selection of those crops which are suitable for organic production (2007). 3.) Selection of crops most suitable as primary crops for national market. 4.) Selection of crops with competitive strengthen on export markets (on basis of market research). 5.) Approval of leading crops by Advisory Coordinative Committee. 	Taken into consideration the status quo of organic production and the limited resources focus should be given to selected crops most suitable for entering the market.	2007-2008	SDC (2007), State Budget of OA (Budget Item 3.9 - 2008)	Pro Bio (2007), MAFWE (2008)	Leading crops are identified.
6.1	2, 7	Improving Organic Data Collection.	Compilation and publication of appropriate data about organic farms, enterprises and activities in organic sector.	Necessary for monitoring the sector and targeted planning of future development.	2008-2011	MAFWE	MAFWE	Up-to-date data on organic farm area and production is available.
6.2	1	Harmonization of Macedonian legislation related to organic production with EU legislation and international standards (IFOAM, Codex Alimentarius)	<ol style="list-style-type: none"> 1) Revision of law on organic agriculture; 2) Finalizing import procedures; and 3) Permanent updating of legislation. 	Export activities as well as access to European Union require harmonization.	2008-2011	State budget of OA, SDC (2008)	MAFWE, government	Organic legislation is equivalent with EU Regulation on organic agriculture.
6.3	2	Simplifying internal administrative procedures related to organic production.	E.g. application for subsidy programs, registration for inspection/certification, permission for collection area, permission for export.	Complicate and time-consuming procedures are a barrier for the development of organic agriculture.	2008-2011	MAFWE and other government al institutions	MAFWE, government	Applications or permissions related to OA are usually completed within four weeks.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
6.4	2	Including organic farming in national/local strategic documents.	Supporting local self-governments in developing models for organic production in regard to protection and sustainable use of natural resources.	By covering OA in strategic documents OA will be considered in Local Economic Plans and Local Environmental Action Plans.	2008-2011	MAFWE	MAFWE, MOEPP, local self-government	National and local strategic documents consider OA.
6.5	1, 7	Establish a concept to insure GMO-free production for OA.	Elaboration of a policy paper to ensure GMO-free production and including adequate measures the legislation for approval of GMO.	Organic products contaminated can not be sold as organic neither on the local nor on the export market.	2008-2011	MAFWE, MOEPP	MAFWE, MOEPP	Policy paper to ensure GMO-free production. No contamination of organic products with GMO.
6.6	3, 4	Improving capacities in state administration dealing with OA.	Target groups: Agricultural State Inspectorate, Food Safety Directorate, Market Inspectorate, Division Organic Production, boarder inspectors and customs officers.	Efficient implementation of the organic legislation and other support measures for OA.	2008-2011	MAFWE, government, donors	MAFWE	Efficient implementation of legal aspects in regard to OA.
6.7	4	Refunding of costs for analysis.	Analysis of soil, water and crop and product samples to assess risk of persistent residues and application of non-authorized products.	Lab analysis is expensive.	2007-2011	State budget for OA	MAFWE and certification bodies	Identification of production areas or crops with a risk of contamination.
6.8	5	Establish concept for sustainable collection activities.	Financial support for inventory of species for collection in collection area. Registration of collection centers. Education and registration of collectors. Monitoring of sustainable collection.	Risk of over exploitation of collection areas and disappearance of collected species.	2008-2011	MAFWE MOEPP	MAFWE MOEPP	No over-exploitation of wild species. Established monitoring system for productivity of collected species.
6.9	2, 4, 6	Establish a policy to involve the stakeholders in all activities related to the NSAP.	Considering involvement of stakeholders for all measures related to the NSAP e.g. by establishing respective committees for consultancy, delegating tasks to sector committees, implementing hearing procedures.	Ensuring efficient and targeted support for organic sector.	2008-2011	--	MAFWE	Main stakeholders are sufficiently represented in national committees related to OA. For all measures related to OA feedback of stakeholders has been requested and considered.
6.10	2, 7	Establishing sufficient capacities for implementation of NSAP.	Providing sufficient human resources (at least one fulltime staff); Defining the role of advisory coordinative committee and making sure that they can participate actively in the implementation of the NSAP. Training and consultancy of Ministry (SDC).	For a successful implementation of the NSAP sufficient human resources are crucial. The current capacities already working to full capacity.	2008-2011	MAFWE, SDC (2008), other donors	MAFWE, projects	Concepts are elaborated and implemented according to planning. For actions partly or fully financed by donors, suitable donors are identified and implementation is coordinated with MAFWE.

	Objective	Action	Explanation / Description	Justification	Time-frame	Source for budget	Implements	Indicator
6.11	2, 7	Monitoring implementation of NSAP.	Continuous monitoring whether the objectives and indicators are met by MAFWE and at least annual reporting to the Advisory Coordinative Committee to allow corrective planning if needed. Training and consultancy for monitoring system (SDC).	Necessary for successful implementation of the NSAP and efficient use of resources.	2008-2011	MAFWE, SDC (2008), other donors	MAFWE	Annual report comparing achieved results with objectives and indicators. Annual planning for adaptation of NSAP.
6.12	2, 6, 7	Support of the activities of the Advisory Coordination Committee (ACC) to increase cooperation among stakeholders.	Establishment of ACC is an obligation from the Law on organic agriculture in order to increase cooperation and communication among relevant stakeholders.	Although the ACC was established in 2005 not so many activities were undertaken so far.	2008-2011	State budget	MAFWE	Regular meetings are conducted. Good cooperation among stakeholders.

Annex 2: Budget for the NSAP

	Actions			1,40	1,30	1,20	1,20		0,0162				
	Production	Source for budget	Time-frame	2008	2009	2010	2011	Total 2008-2011	2008	2009	2010	2011	Total 2008-2011
1.1	Financial support for organic production area.	State budget for OA	2008-11	4.200.000	5.500.000	6.600.000	8.000.000	24.300.000	67.956 €	88.990 €	106.788 €	129.440 €	393.174 €
1.2	Re-imbusement of inspection and certification costs.	State budget or OA	2008-11	1.300.000	1.600.000	2.000.000	2.400.000	7.400.000	21.034 €	25.888 €	32.360 €	38.832 €	118.114 €
1.3	Financial support for organic production area in protected areas.	Program for support of investments in protected areas	2008-2011	300.000	300.000	400.000	500.000	1.500.000	4.854 €	4.854 €	6.472 €	8.090 €	24.270 €
1.4	Establishing a net of pilot/ demonstration farms.	Donors and State budget for OA	2008-2011	1.000.000	1.500.000	1.500.000	1.500.000	5.500.000	16.180 €	24.270 €	24.270 €	24.270 €	88.990 €
1.5	Voucher system for consulting services for organic technology advice to farmers.	Funds from Ministry of Agriculture and SIDA	2008-2011					0	0 €	0 €	0 €	0 €	0 €
1.6	Establish a database on the availability of organic seeds, propagation material and seedlings.	State Budget and Donors	2008-2009		100.000	100.000	100.000	300.000	0 €	1.618 €	1.618 €	1.618 €	4.854 €
1.7	Financial support for organic farmers for production of approved organic seed material.	State budget, donors	2008-2011	500.000	500.000	1.000.000	1.000.000	3.000.000	8.090 €	8.090 €	16.180 €	16.180 €	48.540 €

1.8	Facilitating import procedures for inputs needed in organic production.	MAFWE, donors	2008-2011					0	0 €	0 €	0 €	0 €	0 €
1.9	Analyzing the necessary farm inputs and establishing a list of approved inputs (brands).	SDC (2008), State budget for OA	2008-2011	0	100.000	100.000	100.000	300.000	0 €	1.618 €	1.618 €	1.618 €	4.854 €
1.10	Financial and technical support for National Federation of Organic Producers.	SDC (2008)	2007-2008					0	0 €	0 €	0 €	0 €	0 €
1.11	Generating specific knowledge for adequate post harvest procedures.	Donors	2008-2011					0	0 €	0 €	0 €	0 €	0 €
1.12	Co-financing of packaging material.	Donors and State budget for OA and/or IPARD	2008-2011	100.000	200.000	200.000	200.000	700.000	1.618 €	3.236 €	3.236 €	3.236 €	11.326 €
1.13	Publishing an organic farming journal.	Donors and state budget of OA	2009-2011		50.000	100.000	100.000	250.000	0 €	809 €	1.618 €	1.618 €	4.045 €

	Processing and Trade	Source for budget	Time-frame	2008	2009	2010	2011	Total 2008-2011	2008	2009	2010	2011	Total 2008-2011
2.1	Co-financing of certification costs (storage and processing).	State budget for OA	2007-2011	600.000	900.000	1.200.000	1.500.000	4.200.000	9.708 €	14.582 €	19.416 €	24.270 €	67.956 €
2.2	Voucher system for consulting services for organic technology advice to SMEs for processed organic products.	ME, SIDA	2008-2011					0	0 €	0 €	0 €	0 €	0 €
2.3	Annual award for best new organic processed product:	State budget for OA or donors	2009-2011	0	200.000	200.000	200.000	600.000	0 €	3.236 €	3.236 €	3.236 €	9.708 €

	Market Development	Source for budget	Time-frame	2008	2009	2010	2011	Total 2008-2011	2008	2009	2010	2011	Total 2008-2011
3.1	Central Organic Farming Internet portal for organic products.	SDC (2008), other donors	2007-2011					0	0 €	0 €	0 €	0 €	0 €
3.2	Development and implementation of a National Public awareness campaign for organic production.	State Budget on OA and donors	2008-2011	1.500.000	1.500.000	3.000.000	3.000.000	9.000.000	24.270 €	24.270 €	48.540 €	48.540 €	145.620 €
3.3	Revision of organic logo.	State Budget, donors	2008	160.000	0	0	0	160.000	2.589 €	0 €	0 €	0 €	2.589 €
3.4	Organizing Organic Food days.	SDC (2008), other donors	2008-2011					0	0 €	0 €	0 €	0 €	0 €
3.5	Co-financing participations of organic operators at national events, exhibitions and fairs.	State budget of OA, donors	2007-2011	300.000	300.000	300.000	300.000	1.200.000	4.854 €	4.854 €	4.854 €	4.854 €	19.416 €
3.6	Publishing guides and directory (e.g. tourist guides, shopping guides etc) for organic farms and their products.	Donors and State budget of OA	2008-2011	100.000	200.000	250.000	350.000	900.000	1.618 €	3.236 €	4.045 €	5.663 €	14.562 €
3.7	Financial support for organic producers and processors for export promotion of Macedonian products.	SIPPO, other donors, State budget of OA	2007-2011	100.000	100.000	500.000	600.000	1.300.000	1.618 €	1.618 €	8.090 €	9.708 €	21.034 €
3.8	Providing information about export procedures and markets in selected countries.	Donors	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €

3.9	Market research on domestic markets as well as for selected products in export market.	Donors and state budget of OA	2008-2011	1.000.000	1.000.000	0	0	2.000.000	16.180 €	16.180 €	0 €	0 €	32.360 €
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	Education	Source for budget	Time-frame	2008	2009	2010	2011	Total 2008-2011	2008	2009	2010	2011	Total 2008-2011
4.1	Developing curricula in OA for agric. faculties and high agricultural schools. Training of teachers, provision of suitable literature.	SDC (2008), other donors	2007-2009	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
4.2	Practical education by study visits in institutions abroad.	Donors	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
4.3	Student exchange in the field of OA.	Donors, IAMB	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
4.4	Financial contribution for non-formal education.	State Budget or OA, MAASP and donors		1.000.000	1.000.000	1.200.000	1.500.000	4.700.000	16.180 €	16.180 €	19.416 €	24.270 €	76.046 €
4.5	Establish a certification system for OA advisors.	Donors	2008-2009										
4.6	Development of technical manuals and guides on OA.	State Budget IAMB, SIPPO, GTZ, SDC (2008), MAASP	2008-2009	200.000	200.000	200.000	200.000	800.000	3.236 €	3.236 €	3.236 €	3.236 €	12.944 €
4.7	Qualification of advisors in the field of organic agriculture.	SIDA, SDC (2008)	2008-2011					0	0 €	0 €	0 €	0 €	0 €

	Research	Source for budget	Time-frame	2008	2009	2010	2011	Total 2008-2011	2008	2009	2010	2011	Total 2008-2011
5.1	Initiation research on selected organic topics in national and sector research programs.	State Budget on OA, SDC (2008)	2008-2011	400.000	1.200.000	1.200.000	1.200.000	4.000.000	6.472 €	19.416 €	19.416 €	19.416 €	64.720 €
5.2	Initiate research and demonstration centre for organic farming.	State Budget on OA, donors, governmental programs	2010-2011	200.000	200.000	200.000	200.000	800.000	3.236 €	3.236 €	3.236 €	3.236 €	12.944 €
5.3	Organization of regional scientific congresses on OA in RM.	Governmental programs, Agricultural Institutes, Faculties	2010-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
5.4	Supporting linking up with European research and participation in existing networks (IFOAM, EU networks).	IAMB, other donors	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €

	Policy, legislation, and inspection	Source for budget	Time-frame	2008	2009	2010	2011	Total 2008-2011	2008	2009	2010	2011	Total 2008-2011
6.1	Improving Organic Data Collection.	MAFWE		0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
6.2	Harmonization of Macedonian legislation related to organic production with EU legislation and international standards (IFOAM, Codex Alimentarius)	State budget of OA, SDC (2008)	2007-2011	300.000	200.000	100.000	100.000	700.000	4.854 €	3.236 €	1.618 €	1.618 €	11.326 €
6.3	Simplifying internal administrative procedures related to organic production.	MAFWE and other governmental institutions	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
6.4	Including organic farming in national/local strategic documents.	MAFWE	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
6.5	Establish a concept to insure GMO-free production for OA.	MAFWE, MOEPP	2008-2009	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
6.6	Improving capacities in state administration dealing with OA.	MAFWE, government, donors	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
6.7	Refunding of costs for analysis.	State budget for OA	2007-2011	1.000.000	1.000.000	400.000	400.000	2.800.000	16.180 €	16.180 €	6.472 €	6.472 €	45.304 €
6.8	Establish concept for sustainable collection activities.	MAFWE MOEPP	2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €

6.9	Establish a policy to involve the stakeholders in all activities related to the NSAP.		2008-2011	0	0	0	0	0	0 €	0 €	0 €	0 €	0 €
6.10	Establishing sufficient capacities for implementation of NSAP.	MAFWE, SDC (2008), other donors	2008-2011	140.000	150.000	150.000	150.000	590.000	2.265 €	2.427 €	2.427€	2.427 €	9.546 €
6.11	Monitoring implementation of NSAP.	MAFWE, SDC (2008), other donors	2008-2011		400.000	400.000	800.000	1.600.000	0 €	6.472 €	6.472 €	12.944 €	25.888 €
6.12	Support of the activities of the Advisory Coordination Committee (ACC) to increase cooperation among stakeholders.	State budget	2008-2011	100.000	100.000	100.000	100.000	400.000	1.618 €	1.618 €	1.618 €	1.618 €	6.472 €
Total			14.500.000	18.500.000	21.400.000	24.500.000	78.900.000		232.992 €	299.330 €	346.252 €	396.410 €	1.274.984 €
	Direct to production		8.00.000	10.000.000	11.800.000	14.000.000	43.800.000		129.440 €	161.800 €	190.924 €	226.520 €	708.684 €
	Direct to production, %		55%	54%	55%	57%	56%		55%	54%	55%	57%	56%

		Total per area							Total per area, %				Average
	Production	7.400.000	9.850.000	12.000.000	13.900.000	43.150.000			51%	53%	56%	57%	55%
	Processing and trade	600.000	1.100.000	1.400.000	1.700.000	4.800.000			4%	6%	7%	7%	6%
	Market development	3.160.000	3.100.000	4.050.000	4.250.000	14.560.000			22%	17%	19%	17%	18%
	Education	1.200.000	1.200.000	1.400.000	1.700.000	5.500.000			8%	6%	7%	7%	7%
	Research	600.000	1.400.000	1.400.000	1.400.000	4.800.000			4%	8%	7%	6%	6%
	Policy and legislation	1.540.000	1.850.000	1.150.000	1.550.000	6.090.000			11%	10%	5%	6%	8%
		14.500.000	18.500.000	21.400.000	24.500.000	78.900.000			100%	100%	100%	100%	100%

Annex 3: List of stakeholders who worked on the NSAP

Annex 3.1: Resolution by the Minister of Agriculture, Forestry, and Water Economy to establish the Work Group for Drafting the NSAP

Друштво за трговија и услуги
ПРОБИО ДООЕЛ увоз-извоз
Бр. 11-001/1
15.01. 2007 год
СКОПЈЕ



РЕПУБЛИКА МАКЕДОНИЈА
МИНИСТЕРСТВО ЗА ЗЕМЈОДЕЛСТВО
ШУМАРСТВО И ВОДОСТОПАНСТВО

Бр. 02-187/1
09.04. 2007 година
Скопје

Врз основа на член 49 став 1 и член 55 став 1 од Законот за организација и работа на органите на управата (Службен Весник на РМ бр. 58/2000 и 44/2002), Министерот за земјоделство, шумарство и водостопанство донесува

РЕШЕНИЕ

За формирање на работна група

1. Заради потребата за изработка на Стратегија со Национален Акционен План за развој на органското земјоделско проеизводство во Република Македонија, се формира Работна група во следниот состав :

- Панче Николов	Министерство за земјоделство
- Софица Георгиевска	Министерство за земјоделство
- Робертина Брајановска	Министерство за животна средина и просторно планирање
- Владимир Цабирски	Факултет за земјоделски науки и храна
- Љубинка Габрова	СЈР проект за институционално зајакнување на капацитетите на МЗШВ
- Ирена Цимревска	ГТЗ МАФП проект
- Гордана Пецел	СДЦ-Пробио
- Оливера Бичклиска	Министерство за земјоделство

2. Работната група ќе работи на состаноци од кои со записник редовно ќе го известува министерот за извршената работа.
3. По потреба Работната група, доколку смета за неопходно, може да ангажира надворешни лица како експерти од областа.
4. За работата на членовите на Работната група следи надомест, кој ќе го одреди министерот со посебно решение.
5. Ова Решение стапува во сила со денот на донесувањето.

изработил: Панче Николов 



МИНИСТЕР,

Ацо Спасевски 

Annex 3.2: List of participants in the Initial NSAP Workshop: Status Quo Analysis (Ohrid, 13. and 14.12.2006)

1. Panče Nikolov Ministry of Agriculture, Forestry, and Water Economy
2. Sonjica Georgievska Ministry of Agriculture, Forestry, and Water Economy
3. Robertina Brajanovska Ministry of Environment and Physical Planning
4. Vladimir Georgiev National Extension Agency
5. Vasko Zlatkovski National Extension Agency
6. Biljana Ćorčeska National Extension Agency
7. Ljupčo Ristovski Cabinet of the Vice-Prime Minister for Agriculture
8. Tatjana Mitkova Faculty for Agricultural Sciences and Food
9. Tatjana Prentović Faculty for Agricultural Sciences and Food
10. Vladimir Džabirski Faculty for Agricultural Sciences and Food
11. Rukie Agić Agricultural Institute
12. Ljupčo Tošev FACE – Foundation Agro-Centre for Education
13. Elizabeta Angeleska Association of Secondary Agricultural Schools
14. Goran Angelovski Federation of Producers of Organic Products “Biosan”
15. Dimče Baleski Federation of Producers of Organic Products “Biosan”
16. Ćorgi Hadži-Kotarov Federation of Producers of Organic Products “Biosan”
17. Vladimir Trajkov Farmers’ Federation of Macedonia
18. Natalija Angelova MED – Macedonian Environmental Movement
19. Lilian Kandikjan SDC – Swiss Development and Cooperation Agency
20. Gordana Pecelj SDC project: Organic Agriculture Development in Macedonia
21. Radomir Trajković SDC project: Organic Agriculture Development in Macedonia
22. Irena Džimrevska GTZ project: Macedonian Agriculture and Food Production Promotion (MAFP)
23. Valentina Stojanoska SIDA project: Support to farmer Associations in the Republic of Macedonia (SFARM)
24. Petar Ćorgievski SIDA project: Macedonian Agricultural Advisory Service support project (MAASP)
25. Ljubinka Gabrova MAFWE (EU CARDS) project: Structural and Legal Reforms in MAFWE (SLR)
26. V. Kolar-Jovanovska “Balkan Biocert” private body for organic inspection & certification
27. Krste Georgiev “Trgoiņineriņg” private company from ođ Radoviš
28. Biljana Stojmirova “Antares” private company from Kočani
29. Jovančo Sekulovski “Gica” private company from Ohrid
30. B. Dimitrova-Radeska “Eko-Agro” NGO from Ohrid

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|----------------------|---|
| 31. Beate Huber | FiBL – Swiss Research Institute for Organic Agriculture |
| 32. Milena Nikolova | Ministry of Agriculture and Forestry of Bulgaria |
| 33. Tom Vaclavik | Green Marketing, Organic Business, the Czech Republic |
| 34. Irena Andreevska | GTZ |

Annex 3.3: List of Participants in the Second NSAP Workshop: Presentation of the First Draft (Skopje, 25.04.2007)

1. Panče Nikolov	Ministry of Agriculture, Forestry, and Water Economy
2. Sonjica Georgievska	Ministry of Agriculture, Forestry, and Water Economy
3. Olivera Bičikliski	Ministry of Agriculture, Forestry, and Water Economy
4. Milijana Georgievska	Ministry of Agriculture, Forestry, and Water Economy
5. Robertina Brajanovska	Ministry of Environment and Physical Planning
6. Vaedin Dauti	Ministry of Economy
7. S. Mihajlovska-Đošić	EU Affairs Secretariat
8. Vasko Zlatkovski	National Extension Agency
9. Vladimir Georgiev	National Extension Agency
10. Elizabeta Taseva	National Extension Agency
11. Valentin Zahariev	National Extension Agency
12. Rukie Agić	Agricultural Institute
13. Ljupčo Mihajlov	Institute for Southern Crops
14. L. Trajkova-Gudeva	Institute for Southern Crops
15. Fidanka Trajkova	Institute for Southern Crops
16. Boris Anakiev	Faculty for Agricultural Sciences and Food
17. Tatjana Prentović	Faculty for Agricultural Sciences and Food
18. Blagica Sekovska	Faculty for Veterinarian Medicine
19. Goran Angelovski	Federation of Producers of Organic Products “Biosan”
20. Suzana Dimitrievska	“Ovčepolski Eko-Proizvodi” Organic Association
21. Jasmina Velkova	“Ovčepolski Eko-Proizvodi” Organic Association
22. Andrijana Slavkovska	“Eko-Svet” NGO
23. Goran Garevski	Farmers’ federation of Macedonia
24. Goce Atanasoski	“Mavrovo” National Park
25. Oliver Avramovski	“Pelister” National Park
26. Sašo Despotovski	Economic Chamber of Macedonia
27. Andrijana Mučeva	“Alkaloid” pharmaceutical company – Bilka
28. Boban Dimovski	“Balkan Biocert” private body for organic inspection & certification
29. Pandeli Pasco	Mediterranean Agronomic Institute of Bari
30. Patrizia Puglieze	Mediterranean Agronomic Institute of Bari
31. Kanj Hamade	Mediterranean Agronomic Institute of Bari
32. Iva Milenković	Mediterranean Agronomic Institute of Bari
33. Lilian Kandikjan	SDC – Swiss Development and Cooperation Agency
34. Natalija Puntevska	SIPPO – Swiss Import Promotion Program

35. Sonja Boglevska GRDP
36. Irena Džimrevska GTZ project: Macedonian Agriculture and Food Production Promotion (MAFP)
37. Žaklina Golčeva IFAD - 2
38. Trajan Dimkovski SIDA project: Support to farmer Associations in the Republic of Macedonia (SFARM)
35. Petar Ćorgievski SIDA project: Macedonian Agricultural Advisory Service support project (MAASP)
36. Ljubinka Gabrova MAFWE (EU CARDS) project: Structural and Legal Reforms in MAFWE (SLR)