



Brussels, 22.12.2020
SWD(2020) 399 final

COMMISSION STAFF WORKING DOCUMENT

EVALUATION

of the

impact of the EU agricultural promotion policy in internal and third countries markets

{SWD(2020) 401 final}

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Glossary

Agricultural/agri-food products refer to (agricultural/food) products produced agriculturally as opposed to through hunting, gathering, and so on.

Annual work programmes are an administrative tool used by the Commission to set the annual strategic priorities for EU spending programmes. In this case, for the promotion programme, the work programmes are adopted by the European Commission in line with Article 8 of Regulation (EU) 1144/2014 of the European Parliament and of the Council of 22 October 2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries.

The **Consumers, Health, Agriculture and Food Executive Agency (CHAFEA)** is an executive agency for the management, technical and financial implementation of four spending programmes, including the multi programmes supported by the EU agricultural promotion policy.

A **competent national authority** is the service designated by the government of the Member State responsible for managing a particular spending programme or legislative requirement. For the agricultural promotion policy, the competent national authority is the service charged with implementing simple programmes.

High-level missions are a Commission initiative run under the EU agricultural promotion policy. They constitute missions for EU officials and business delegates to engage with target audiences outside of the EU (e.g. business representatives) and governments with the aim of opening up international markets, facilitating international partnerships and supporting exports by providing information on EU products.

Implementing bodies are selected by proposing organisations and are responsible for the day-to-day implementation of the programmes.

Key performance indicators are measurable programme milestones for key actions used to track the level of progress of an initiative or measure, often against a target.

In the context of the EU agricultural promotion policy, a **multi programme** is a programme submitted by at least two proposing organisations from at least two Member States or by at least one organisation recognised at the European Union level, which is managed by CHAFEA.

Protected designation of origin is a label given to products that are produced, processed and prepared in a specific area, using a particular, usually traditional, method.

Protected geographical indications identify a product as originating in a particular area, which may be a whole country; the product's given quality, reputation or other characteristic must be attributable to this area and at least one of the production steps must take place in the defined area.

In the context of the EU agricultural promotion policy, **proposing organisations** are both applicants and beneficiaries of simple and multi programmes, depending on the stage of the procedure. In case the proposing organisation is a body governed by public law within the meaning of Directive 2014/24/EU (of the European Parliament and of the Council of 26 February 2014 on public procurement), it must select bodies responsible for implementing programmes under the national legislation transposing this Directive.

In the context of the EU agricultural promotion policy, a **simple programme** is a promotion programme submitted by one or more proposing organisations from the same Member State and managed by national authorities together with the Directorate-General for Agriculture and Rural Development.

Traditional Speciality Guaranteed is a label highlighting the traditional aspects of that product, such as the way it is made or its composition, without being linked to a specific geographical area. The name of a product being registered as a ‘traditional speciality guaranteed’ protects it against falsification and misuse.

Acronyms and abbreviations

AWP	Annual Work Programme
CAP	Common Agricultural Policy
CHAFEA	Consumers, Health, Agriculture and Food Executive Agency
DG	Directorate-General
DG AGRI	Directorate-General for Agriculture and Rural Development
EU	European Union
GVA	Gross Value Added
PDO	Protected Designation of Origin
PGI	Protected Geographical Indications
SPS	Sanitary and Phytosanitary Standard
TSG	Traditional Speciality Guaranteed

1. INTRODUCTION

Purpose and scope

The European Union's agricultural promotion policy is designed to support the EU's agricultural sector by promoting EU products on the internal market and in non-EU countries. This is achieved by co-financing promotion projects and organising information campaigns and high-level missions to raise awareness about the quality of the EU's agricultural products.

Providing information and promoting agricultural products are the key methods used under the common agricultural policy to increase the competitiveness and consumption of EU agricultural products and to increase their market share. By finding new markets, consolidating existing markets and raising awareness among consumers inside and outside the EU of the high standards and high quality of EU agricultural products, the promotion policy contributes to the Commission's objectives of ensuring jobs and growth in rural areas and of tackling increased pressure on the EU agricultural sector¹. In addition, by explaining to consumers and importers the high standards and the quality of EU agri-food products, EU promotion measures can support EU producers in increasingly competitive markets.

The policy is laid down in Regulation (EU) No 1144/2014², Commission Delegated Regulation (EU) 2015/1829³ and Commission Implementing Regulation (EU) 2015/1831⁴. The evaluation covers all three regulations.

Under Article 34 of the Financial Regulation⁵ applicable to the general budget of the European Union, the EU agricultural promotion policy is subject to periodical evaluations, like all EU programmes and activities that entail significant spending.

Article 26(2) of Regulation (EU) No 1144/2014 states that *'[b]y 31 December 2020, the*

¹ Strategic Plan 2016-2020 of the Directorate-General for Agriculture and Rural Development, 19 July 2016. https://ec.europa.eu/info/publications/strategic-plan-2016-2020-agriculture_en.

² Regulation (EU) No 1144/2014 of the European Parliament and the Council of 22 October 2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries and repealing Council Regulation (EC) No 3/2008; OJ L 317, 4.11.2014, p. 56–70.

³ Commission Delegated Regulation (EU) 2015/1829 of 23 April 2015 supplementing Regulation (EU) No 1144/2014 of the European Parliament and of the Council on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries; OJ L 266, 13.10.2015, p. 3–8.

⁴ Commission Implementing Regulation (EU) 2015/1831 of 7 October 2015 laying down rules for application of Regulation (EU) No 1144/2014 of the European Parliament and of the Council on information provision and promotion measures concerning agricultural products implemented in the internal market and in the third countries; OJ L 266, 13.10.2015, p. 14–26.

⁵ Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012; OJ L 193, 30.7.2018, p. 1–222.

Commission shall submit to the European Parliament and to the Council a report on the application of this Regulation together with any appropriate proposals’.

The evaluation provides input to the report issued by the European Commission to the European Parliament and the European Council. The evaluation will also feed into the upcoming review of the EU promotion policy for agricultural and food products with a view to stepping up its contribution to sustainable production and consumption, as set out under the European Commission’s farm to fork strategy⁶.

The evaluation period begins with implementation of Regulation (EU) No 1144/2014, and covers the information and promotion projects carried out since their start in 2016 by the European Commission and the organisations that ran the promotion programmes from all EU Member States and the United Kingdom (i.e. the geographical scope of the evaluation is the EU-28).

The evaluation examines the EU agricultural promotion policy measures targeting EU and non-EU markets over the period 2016-2019. It focuses on assessing the effectiveness, efficiency, relevance, policy coherence and EU value added of specific changes to the implementation and scope of the policy since the previous legislation on promotion policy under Council Regulation (EC) No 3/2008⁷. Specifically, the changes were an increased budget and higher co-financing rates; a broadened scope (measures supported, eligible beneficiaries and products); simplified administrative processes, and more focus on non-EU country markets.

The evaluation is underpinned by the support study on the EU agricultural promotion policy targeting both EU and non-EU markets, published on 14 October 2020 (the ‘support study’)⁸ and takes into account additional data and information.

2. BACKGROUND TO THE INTERVENTION

Description of the intervention and its objectives

The measures specified under the common agricultural policy (CAP) are information provision and the promotion of agricultural products. The general objective is to enhance the competitiveness of the EU agricultural sector and thereby make a direct contribution to the general objective of the CAP in terms of viable food production.

The specific objectives of these information and promotion measures are to:

- a) increase awareness of the merits of EU agricultural products and of the high standards applicable to the production methods in the EU;
- b) increase the competitiveness and consumption of EU agricultural products and certain food products and to raise their profile both inside and outside the EU;
- c) increase the awareness and recognition of EU quality schemes;

⁶ Farm to fork strategy - for a fair, healthy and environmentally-friendly food system is at the heart of the European Green Deal aiming to make food systems fair, healthy and environmentally-friendly; https://ec.europa.eu/food/sites/food/files/safety/docs/f2f_action-plan_2020_strategy-info_en.pdf.

⁷ Council Regulation (EC) No 3/2008 of 17 December 2007 on information provision and promotion measures for agricultural products on the internal market and in third countries; OJ L 3, 5.1.2008, p. 1.

⁸ https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cmef/regulation-and-simplification/evaluation-support-study-eu-agricultural-promotion-policy-internal-and-third-country-markets_en.

- d) increase the market share of EU agricultural products and certain food products, specifically focusing on those markets in non-EU countries that have the highest growth potential;
- e) restore normal market conditions in the event of serious market disturbance, loss of consumer confidence or other specific problems⁹.

Information and promotion measures take the form of:

- a) information and promotion programmes (hereafter ‘programmes’), which can be ‘simple programmes’ submitted by one or more proposing organisations from the same Member State, or ‘multi programmes’ submitted by at least two organisations from at least two Member States, or by one or more EU-level organisations; and
- b) measures taken at the Commission’s initiative, including developing technical support services for the sector.

The EU helps the agri-food sector to finance information and promotion campaigns. By explaining to consumers and importers the high standards and the quality of EU agri-food products, EU promotion programmes can support European producers on an increasingly competitive market. Using the generic signature ‘Enjoy, it’s from Europe’, the policy aims to encourage opening up of new markets, to diversify trading partners and to raise consumer awareness of the high quality methods used by European farmers.

Below the main changes brought in by the 2014 reform of the promotion policy.

- The new promotion policy was given a more substantial budget, increasing from EUR 60 million in 2015 to EUR 200 million as of 2019.
- Although national co-financing by Member States was withdrawn, the EU co-financing rates were significantly increased to reach 70% for simple programmes in the internal market, 80% for multi programmes and simple/multi programmes targeting non-EU countries and 85% for programmes to restore normal market conditions in the event of serious market disturbance, loss of consumer confidence or other specific problems. There is also a 5-percentage point top-up for beneficiaries from Member States under financial assistance.
- The promotion policy is now based on a genuine strategy framed at EU level, with the adoption of an annual work programme. The strategic priorities and their corresponding budgets for promotion policy in terms of population groups, products, schemes or markets to be targeted and the nature of the information and promotion messages to be disseminated must be specified annually in the work programme.¹⁰ It also provides for specific temporary arrangements in response to a serious market disturbance or loss of consumer confidence. It sets out the criteria for evaluating the proposals and specifies that the annual work programme is implemented by means of published calls for proposals.
- The scope of eligible beneficiaries was extended to include producer organisations and EU-level organisations¹¹. The list of eligible products was

⁹ Article 2 of Regulation (EU) No 1144/2014 https://eur-lex.europa.eu/legal-content/en/TXT/?uri=OJ%3AJOL_2014_317_R_0004.

¹⁰ Setting strategic priorities for the promotion policy was a recommendation made by the European Court of auditors, in order to avoid a dispersion of resources and to increase Europe’s visibility through these information provision and promotion measures.

¹¹ See Recital 12 to Regulation (EU) No 1144/2014.

extended to include more processed products (e.g. chocolate). To generate a higher return on investment, restricted mentions of origin and displays of brands are now allowed, without jeopardising the generic nature of the promotion programmes.

- The promotion programmes should demonstrate a European dimension, in terms of impact and content, with a main EU-level message, complementing the initiatives run by the Member States and the private sector.
- Follow-up output, result and impact indicators were defined to better evaluate the performance of promotion measures¹² and be consistent with the common monitoring and evaluation framework of the common agricultural policy¹³.
- The Commission provides a technical support function to help businesses participate in co-financed programmes, prepare efficient campaigns and develop activities on export markets.
- Another important aspect of the reform was to simplify the administrative procedures:
 - some implementation tasks were transferred from the Commission to the Consumers, Health, Agriculture and Food Executive Agency (CHAFEA)¹⁴, for cost efficiency reasons;
 - the administrative procedures were simplified by abolishing the two-step selection procedure (which previously included a pre-selection step);
 - the workflow was also streamlined and modernised. In response to the calls, programme proposals are submitted electronically and evaluated by CHAFEA with the contribution of external expert evaluators specialised in the agri-food business and marketing;
 - the Commission's selection of the proposals is based on the evaluation carried out by external evaluators and strictly follows the ranking of the proposals drawn up by the evaluators¹⁵;
 - multi programmes are managed by CHAFEA under direct management, while simple programmes continue to be managed by national authorities under shared management. The Agency's mandate was extended to cover coordination of measures taken at the Commission's initiative, such as communication campaigns, participation in trade fairs and high-level missions.

From a broader policy perspective, the EU agricultural promotion policy complements other programmes run by the European Commission and at national level, such as national support programmes in the wine sector, the fruit and vegetables operational programmes and school schemes. It aims not only to improve competitiveness and increase market share but also maintain existing shares on highly competitive markets.

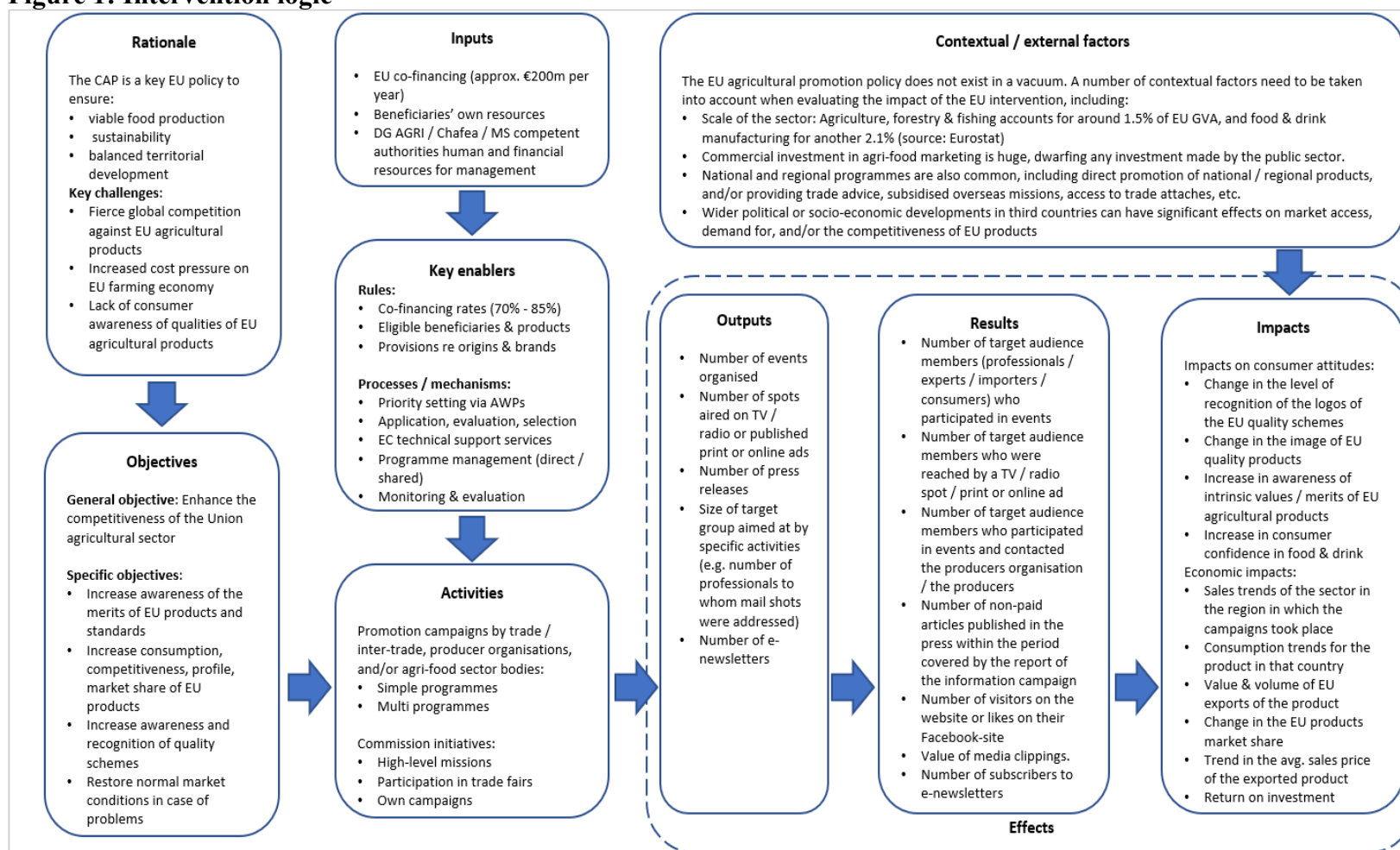
¹² See Article 22 of Commission Implementing Regulation (EU) 2015/1831.

¹³ https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cmef_en

¹⁴ 2014/927/EU: Commission Implementing Decision of 17 December 2014 amending Implementing Decision 2013/770/EU in order to transform the 'Consumers, Health and Food Executive Agency' into the 'Consumers, Health, Agriculture and Food Executive Agency' (OJ L 363, 18.12.2014, p. 183).

¹⁵ The Commission does not intervene in the independent evaluation and has never diverted from the ranking based on the evaluation.

Figure 1: Intervention logic



Other major world players in the agri-food sector also use similar policies. The U.S. Department of Agriculture, for instance, issued funding amounting to USD 300 million in 2019 alone under the agricultural trade promotion programme¹⁶. Over the past few years, Russia has seen exceptional growth in the agriculture sector¹⁷, and both the Russian Export Centre and the regional authorities offer a wide range of services to promote Russian goods in cross-border markets¹⁸.

The scale of governmental funds spent on agricultural promotion should also be put in context alongside private-sector initiatives on food advertising (estimated to amount, for example, to EUR 2 billion for Unilever in 2019).

The European Commission adopts the budget for implementing the EU agricultural promotion policy as part of the annual work programmes for information and promotion measures¹⁹. The budget allocated to information and promotion measures in the annual work programmes almost doubled between 2016 and 2019, from EUR 113 million to EUR 201 million. In particular, the annual budget for multi programmes increased from EUR 16.8 million in 2016 to EUR 91.6 million in 2019. Since 2017, the annual budget allocated to Commission own initiatives remained stable at EUR 9.5 million.

The annual work programmes set the strategic priorities of a given year, according to the needs of the sector²⁰. Priorities can be set on more than one basis (i.e. by product type or to prioritise EU or non-EU markets). Then calls for proposals are launched. The first calls for proposals for simple and multi programmes under the new policy on information provision and promotion measures for agricultural products were launched in 2016 (with the selection in November 2016, of the first programmes awarded funding). After that, two calls for proposals – one for simple and one for multi programmes – are launched each year. Further information on implementing the policy is given in chapter 3.

Points of comparison

When making policy comparisons, note that the period covered by this evaluation spans 2016 to 2019 for Commission own initiatives, but only 2016-2017 for simple and multi programmes (that started implementation in 2017).

The period before Regulation (EU) No 1144/2014 was implemented should serve as the baseline for comparison in the context of this evaluation.

Under the common agricultural policy, Commission funding for promotion and information on agricultural products has evolved significantly since the early 1980s²¹.

¹⁶ <https://www.fas.usda.gov/atp-funding-allocations>

¹⁷ <https://www.rbcc.com/resources/bulletin-online/the-agriculture-and-food-sector-in-russia-global-opportunities-for-growth>

¹⁸ <https://www.exportcenter.ru/en/company/>

¹⁹ For example, for 2019: Commission Implementing Decision on the adoption of the work programme for 2019 of information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries, Brussels, 14 November 2018.

²⁰ The annual work programme forms the basis for calls for proposals for simple and multi programmes.

²¹ Evaluation of Promotion and Information Actions for Agricultural Products, 2012, ADE; <http://www.ade.eu/publications.php>.

Since the outset, the policy has addressed the need to increase awareness of EU quality products, increase competitiveness and increase sales, in particular in non-EU countries. However, before Regulation (EU) No 1144/2014, it was unclear whether the policy met these needs effectively and efficiently as a suitable monitoring and evaluation framework and it largely lacked quantitative outcome indicators. This meant that it was difficult to measure the success of the promotion policy over that period.

Under Regulation (EC) No 3/2008, the scheme was based on co-financing, usually up to a maximum contribution of 50% from the Commission²², with at least 20% from the private sector and the remainder financed by the Member States concerned.

Promotion projects had to be presented in the form of a programme submitted by a professional trade or branch organisation in response to national calls for proposals. The programmes were pre-selected by the Member State and the Commission carried out the final selection.

Prior to the 2014 reform, a high number of the programmes submitted (up to 57%) were rejected by the European Commission's Directorate-General for Agriculture and Rural Development (DG AGRI), mainly due to eligibility and quality reasons. To clarify requirements and expectations, the Commission issued several guidelines since 2006, incorporating lessons learnt from previous programmes and from framework contract evaluations.

The yearly overall Commission expenditure for promotion measures increased from minor amounts in 2002 to relatively stable amounts since 2007, between EUR 45 million and EUR 50 million. Approximately three quarters of this funding was spent on promotion in the EU and the rest on promotion to non-EU countries.

Six products and themes accounted for 78% of all Commission expenditure from 2002 to 2010: fruit and vegetables (26%); dairy (15%); meat (11%); EU quality schemes (9%); wine (8%); and organic products (8%). As for the breakdown by country, 56% of Commission expenditure went on programmes proposed by five countries: Italy (19%), France (14%), Spain (8%), Germany (8%) and Greece (7%). A further 16% was allocated to promote multi-country programmes.

Out of a total 458 programmes signed between 2001 and 2010, most were single proposer programmes targeting national markets. Multi-country programmes, although a priority in the selection process, accounted for less than 10% of total spending, with 41 programmes running between 2001-2010, but for 16% of budget, indicating that they were often of higher financial value.

3. IMPLEMENTATION / STATE OF PLAY

The annual work programme

The annual work programme introduced by Regulation (EU) No 1144/2014 is adopted through an implementing decision²³ taken by the Commission that sets annual strategic priorities for the promotion measures. When deciding on the substance of the work

²² The Commission contribution can be increased from 50 to 60% for schemes to promote healthy eating of fruit and vegetables targeted at children in education, and for information on responsible drinking patterns and harm linked to hazardous alcohol consumption.

²³ https://ec.europa.eu/info/promotion-eu-farm-products_en#annualworkprogramme

programme, the Commission takes into account contributions from the Member States (via the Committee for the Common Organisation of the Agricultural Markets), from stakeholders from the agri-food sector and the socio-professional sector (via the Civil Dialogue Group), and internal macroeconomic analysis²⁴. 128 promotion programmes were funded under the annual work programmes over 2016-2017: 112 simple programmes and 16 multi programmes.

Market priorities are based on the objectives set out in the Regulation, notably to increase the number of activities aimed at non-EU countries where there is the highest potential of growth. Within the EU, the main objective is to inform consumers about the high standards of EU products, the EU quality schemes and the associated symbols, namely organic production, protected geographical indication, protected designation of origin, traditional speciality guaranteed, 'mountain product' and the logo for products from outermost regions.

For non-EU countries, the Commission conducted a macroeconomic analysis on the projected increase in imports, and a policy review of free trade agreements and expected removal of barriers to trading health and plant-health products. Indeed, promotion programmes can help lay the groundwork for potential exports to non-EU markets before concluding or applying a free trade agreement.

The aim of annual work programmes is to provide a relevant tool to achieve a dynamic and targeted promotion policy, by aligning each year with the evolving needs and opportunities of the sector, and identifying priorities with an indicative, specific budget.

In addition, the promotion policy is responsive and includes a facility to allocate ad hoc, specific budget to fund programmes supporting sectors that face difficulties, such as the dairy and pigmeat sectors in 2016 and 2017, beef and sheep/goat meat in 2017, table olives in 2018, rice in 2019, and the beef/veal sector in 2020.

In parallel, annual work programmes have contributed to aligning promotion policy with other EU policy objectives. Notably, they ring-fenced a dedicated budget to co-finance programmes on sustainable agriculture (sustainable agriculture and the role of the agri-food sector for climate action and the environment in 2017, sustainable aspects of sheep and goat meat production in 2018, sustainable rice production in 2019). This supported Commission work to contribute to the 2030 Sustainable Development Goals and the Paris Climate Agreement. In its 2021 annual work programme, the Commission proposes ring-fencing 50% of the budget to promote organic products, sustainable agriculture, and increased consumption of fruit and vegetables in the context of balanced and proper diets. All of these topics contribute to the farm to fork and biodiversity strategies adopted by the Commission in 2020.

Annual work programmes also reserved dedicated budget to co-finance programmes that encourage healthy eating and dietary practices, in line with the Commission's strategy on nutrition, overweight, obesity and other related health issues (to finance programmes in the EU on fresh fruit and vegetables as part of a balanced and proper diet in 2018, 2019 and 2020).

Finally, annual work programmes also plan budget for action to respond to unexpected serious market disturbance, loss of consumer confidence or other specific problems, in

²⁴ For instance Copa Cogeca, Europatat, Interbev, Arelfh, Epha, FoodDrinkEurope, Freshfel, Interfel, Cdl, Ceev, Clitravi Via Campesina, Flowers Auctions, Slow food, AVEC.

line with exceptional measures taken under Part V, Chapter 1 of Regulation (EU) No 1308/2013²⁵.

These budget lines were used for the first time in 2020 as a response to the COVID-19 crisis on the agri-food sector. Additional calls for proposals were launched to address serious market disturbance, loss of consumer confidence or other specific problems under section 1.2.2 of the 2020 annual work programme²⁶, on 7 July 2020, to fund action complementary to the COVID-19 crisis package adopted on 30 April 2020²⁷.

The promotion programmes

Scope

A promotion programme is a coherent set of operations with the aim of informing the target audience or promoting a product, sector or scheme. It is implemented over a period of between one and three years. It can include advertising campaigns in the press, on television, on radio or online; point-of-sale promotions; public relations campaigns; participation in exhibitions and fairs, social media and a range of other activities. It can be a business-to-business campaign and/or business-to-consumer campaign.

Overview of the calls for proposals

The high number of proposals (between 144 and 226 every year) received after publishing the calls for proposals from 2016 to 2019 indicates a genuine interest in the scheme. Between 2011 and 2014 the yearly average number of proposals received was 73.

Each proposal is evaluated by three independent experts against the criteria in the calls. All eligible proposals are ranked according to the total number of points awarded. The highest ranked proposal or proposals are awarded co-financing, subject to budget availability. Neither the annual work programmes nor the calls for proposals include a breakdown of the budget between Member States.

The selection of proposals is based on the quality of the proposals, i.e. how well they meet the criteria set out in the calls. Another important factor is the level of competition in the topic within which they were submitted.

Statistics on the type of participants show that not only well-known trade or inter-trade organisations participate, but also a high number of producer organisations or associations of producer organisations, groups of producers and operators active in geographical indications, etc.

The details on selected programmes (names of beneficiaries, budget, product sector, targeted countries, messages and statistics) can be found on CHAFEA's website²⁸. It also

²⁵ Regulation (EU) No 1308/2013 of the European Parliament and of the Council of 17 December 2013 establishing a common organisation of the markets in agricultural products and repealing Council Regulations (EEC) No 922/72, (EEC) No 234/79, (EC) No 1037/2001 and (EC) No 1234/2007; OJ L 347, 20.12.2013, p. 671–854.

²⁶ https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/key_policies/documents/annex-commission-decision-c2019-8095_en.pdf

²⁷ <https://eur-lex.europa.eu/content/news/Covid19.html>

²⁸ <https://ec.europa.eu/CHAFEA/agri/campaigns/map-and-statistics-target-countries>

gives examples²⁹ of campaigns, including visuals, pictures of the implemented projects, first results, etc.

Statistics on the calls for proposals

CHAFEA's website³⁰ publishes yearly detailed statistics on the calls.

Annex 4 provides a description of the results of the calls from 2016 (the first year of implementing the reformed promotion policy) to 2019.

Focus on non-EU countries

The reformed policy gives priority to programmes targeting non-EU countries to take advantage of their growth potential. As described below, both the number of programmes and the budget of programmes targeting non-EU countries increased in this programming period (2016-2019).

Annex 5 provides more details.

In terms of the number of programmes, only a third of the proposals submitted covered non-EU countries under the 2008 Regulation, increasing over the period 2016-2019 to around 60% of simple and multi programmes.

In the period 2016-2018, the proportion of programmes targeting non-EU countries was higher among simple programmes than for multi programmes (63% against 35% in multi programmes). In 2019, this trend continued, with 77% of simple programmes and 48% of multi programmes targeting non-EU countries.

When compared by year, the number of programmes targeting non-EU countries was at its highest in 2019 (55 programmes), and lowest in 2017 (32 programmes). Between 2016-2018, 53% of the budget was allocated to programmes targeting non-EU markets.

Regarding the targeted non-EU countries, over 50% of the funds in each annual budget from 2016 to 2019 were earmarked for China, Japan, South Korea, Taiwan together with the rest of the South East Asia region and India, Colombia and North American markets.

Indicators

The annex to Regulation (EU) No 2015/1831 presents a list of indicators that can be used by the proposing organisations to assess the impact of the programmes.

For simple programmes, Member States send the Commission electronic notification of the impact indicators, under Article 21 of Regulation (EU) No 2015/1831. For multi programmes, the beneficiaries notify directly the indicators via an online platform.

These communications are stored in a joint database. Programme managers at the Commission and CHAFEA compare the indicators received with those included in the programme proposals for follow-up of the promotion programmes.

Impact indicators include, for example, sales figures for the sector in the year following the promotion campaign, the trend in average sales price of the exported product, change in the level of recognition of the logos of EU quality schemes, or an increase in awareness of intrinsic values of EU agricultural products.

To illustrate the impact indicator outcome, for multi programmes, there are two representative examples (covering both the internal market and non-EU countries) that

²⁹ <https://ec.europa.eu/CHAFEA/agri/content/info-day-calls-proposals-2018>

³⁰ <https://ec.europa.eu/chafea/agri/content/previous-programmes>

show how in general the multi programmes increased awareness, market share and sale price of the promoted products:

- In the internal market: a campaign to promote cheeses with a protected designation of origin or protected geographical indication registered a 28% awareness of these EU quality schemes with an important change in the level of recognition, considering that, according to special Eurobarometer 504³¹, only 14% of European consumers recognised the logos of products carrying a protected designation of origin and 20% for a protected geographical indication;
- In non-EU countries: a campaign to boost the competitiveness of EU quality wines in the US and Canada achieved by the end of the programme a 17% increase in market share and 8% in average sales price of the promoted products.

For simple programmes, the following examples are illustrative of their success in increasing awareness, market share and recognition of EU quality scheme logos:

- A programme promoting pigmeat in China registered an 18% increase in awareness of intrinsic values of EU agricultural products and a 36% increase in the level of recognition of EU quality scheme logos;
- A programme promoting cheese in Colombia and Mexico achieved a 16% and 11% increase in market share of EU products respectively, and an increase in the level of recognition of EU quality scheme logos of 10% in Colombia and 9% in Mexico.

Measures taken at the Commission's initiative

These measures include high-level missions, participation in trade fairs and exhibitions of international importance by representation at stands, or action to boost the image of EU products, including communication campaigns. They also include developing technical support services, including market handbooks.

Annex 6 provides a detailed list of measures taken at the Commission's initiative from 2016 to 2019.

Technical support

CHAFEA has developed a portal³² to help potential applicants. It includes webinars that have, according to feedback from the surveys, enabled a better understanding of promotion policy, different market opportunities and new rules for applications.

High-level missions

High-level missions, about two per year (see Annexes 6-7) aim to facilitate market access for European agri-food products. They typically include high-level political meetings involving members of the Commission and an intensive business-related programme for leading representatives of EU exporters and the agri-food sector. The political agenda generally includes discussions on trade agreements, trade and market access issues, health, plant-health and technical barriers to trade issues, discussions on organic production, geographical indications, etc. Business activities typically concentrate on

³¹ Special Eurobarometer 504: Europeans, Agriculture and the CAP, October 2020.

³² <https://ec.europa.eu/chafea/agri/>

improving market intelligence through targeted seminars and workshops, retail visits and site visits, complemented by business-to-business meetings or business fora.

Participants in these missions are selected via calls for applications and on the basis of several criteria, particularly geographical and sectoral balance, balance between small, medium and larger companies; national and European umbrella organisations.

After each mission, the Commission conducts at least two surveys of the participants to assess the results and impact. The average satisfaction rate among business delegates is generally above 90%. Most business delegates confirmed that the contacts made during the mission facilitated their business and contributed to advancing their business goals.

EU pavilions (stands) at major international agriculture food, beverage and hospitality fairs

Trade fairs, which make up 17% of the budget, proved particularly successful. They are an effective communication channel to help raise awareness of the merits and quality features of EU agricultural products (e.g. quality standards and geographical indications) with positive feedback reported in all cases (90%).

The Commission runs two to three EU stands each year at selected major international agriculture, food, beverages and hospitality fairs to showcase the excellence of European agri-food products. The stands focus on storytelling about European products, developing online content, advertising and media relations, as well as putting on tasting sessions and cookery masterclasses for business audiences. The aim of the events is to convey the strength of EU agricultural products strength in food safety, quality, traceability, authenticity, tradition and nutritional value, with a special focus on EU quality labels.

Other activities

Seminars on EU standards for agri-food products

These seminars are typically held with target groups of government officials, major importers, retailers, distributors and specialised journalists in non-EU countries. The events are designed to explain and convey information on EU sanitary, plant health (SPS) and food quality standards, with a view to boosting agri-food exports. These regulatory seminars may be accompanied by product displays and culinary demonstrations to showcase both the EU's high production standards and its rich culinary heritage.

Communication campaigns

Communication campaigns are run primarily to follow up on promotion activities already carried out in a given target country (most notably high-level missions) or to engage with target audiences in countries before an EU-led business delegation visits. They are designed to promote EU agri-food products and are focused on the safety, authenticity (e.g. guarantee of origin) and quality of EU products. They aim to raise awareness of the excellence of EU agri-food products; encourage business audiences to import EU products; encourage consumers to buy EU products; and increase awareness of the benefits of economic partnership agreements (e.g. with Canada and Japan).

The target audience of these campaigns is typically consumers (usually segmented in each target market, focusing on those with the highest purchasing power or interest in foreign foods), business people (importers, retailers, distributor, hospitality sector), media and key opinion leaders.

Technical support services

Technical support consists of providing information on the dedicated portal and organising events and other communication activities.

The dedicated portal has been created with the aim of helping potential applicants understand the promotion policy and the process of submitting proposals. It also provides best practice examples and legal guidance³³, and information on all co-funded programmes since 2014. The portal contains a platform helping potential applicants seek partners for multi-applicant proposals. The second aim of the portal is to raise awareness on different markets by providing tailor-made market intelligence reports and information on key target countries listed in the annual work programmes, such as information on market access, sanitary and phytosanitary (SPS) regulations, and protecting intellectual property rights.

During the call submission period, from January to April each year, CHAFEA's helpdesk replies to questions by email on the conditions in the call for applications.

CHAFEA actively contributes to communications on the promotion policy by organising an annual Info Day in Brussels³⁴. The Commission (DG AGRI and CHAFEA) also participated in over 50 national info days organised by the Member States, each attended by 20-90 participants.³⁵

4. METHOD

The evaluation is underpinned by an external support study and complemented by data and analysis carried out by the Commission (DG AGRI and CHAFEA).

It also draws on the responses to the consultation on the roadmap conducted from 18 July 2018 to 15 August 2018 and the public consultation carried out between 8 May and 11 September 2020 on the Commission's web portal 'Have Your Say'.

A mixed-method approach has been used. It draws on a range of tools to compile and analyse quantitative as well as qualitative data and information to provide a robust, nuanced assessment not only of the effects of the EU's agricultural promotion policy, but also of how and why these effects have been generated. It looks at the main features and changes brought in by the new legal framework.

Based on the above methodological considerations, the mixed methods of data collection are listed below. The first three methods collected data on the policy as a whole, while the case studies yielded a more in-depth assessment of the effect of a few measures.

- Document and data review (EU-level). The review was carried out in English to collect qualitative and quantitative data on different aspects of the intervention logic.
- EU-level interviews with:
 - 1) the European institutions and agencies involved in programming and implementing the EU promotion policy;

³³ Competitive procedure: https://ec.europa.eu/chafea/agri/sites/chafea/files/agri-2016-61788-00-00_en.pdf

Grants suspension and termination https://ec.europa.eu/chafea/agri/sites/chafea/files/guidance-simple-programmes-terminations-ga_en.pdf

³⁴ <https://ec.europa.eu/CHAFEA/agri/newsroom-and-events/events>

³⁵ <https://ec.europa.eu/CHAFEA/agri/newsroom-and-events/events/info-days-member-states-calls-proposals-2018>

- 2) external evaluators hired by CHAFEA for the selection of applications;
 - 3) those involved in other EU policies in the field of trade, development, environment, climate change and health (e.g. Directorates-General for Trade, International Cooperation and Development, Health and Food Safety, Environment and Maritime Affairs and Fisheries);
 - 4) pan-European agricultural producer and trade organisations and associations and
 - 5) a non-governmental organisation.
- Two online surveys. To collect the views of a wide range of stakeholders involved in the policy: one survey targeting the competent national authorities, and the other targeting the proposing organisations (and the teams implementing the measures), including successful and unsuccessful applicants.
 - Case studies. Data for the case studies was collected through:
 - Case study document and data review: this includes programme implementation or evaluation reports (or if available, evaluations at Member State level aggregating the results of all programmes funded), as well as secondary data to assess the effects of the programmes.
 - Targeted interviews: with at least one competent national authority and one proposing organisation per programme. For programmes targeting non-EU countries, the interviews includes a member of the EU Delegation in that country, a producer or trade association, where feasible, business delegates in the country, etc.
 - Public consultation. A public consultation was held as part of this evaluation. It generated 144 replies, of which 38 (i.e. 27% of the respondents) were from non-governmental, consumer and environmental organisations, 64 (44%) from business organisations / associations or trade unions, 12 (8%) from public authorities, 17 (12%) from EU citizens and 13 (9%) from academic/research institutions or ‘others’.

The analytical tools used in this evaluation included programme statistics (such as number of visitors at fairs and participants in non-EU delegations) and indicators (such as impact indicators measuring the impact of the policy on change in awareness). The review of the programme indicators included all available output, result and impact indicators used for reporting on simple and multi programmes funded in 2016 and 2017. The indicators were provided by CHAFEA and DG AGRI. For the support study, complete indicator data was available for 74 out of 112 simple programmes and all multi programmes.

Limitations and robustness of findings

The evidence collected served as the basis for a robust and nuanced assessment of the effects of the EU agricultural promotion policy, in addition to how and why these effects have been generated.

However, the study faced a number of inherent challenges and resultant limitations.

Impact indicators could often not be measured during the reporting, e.g. when data were not yet available or their measurement appeared difficult. The analysis could therefore take into account output and result indicators only.

Some difficulties arose when evaluating the use of indicators as well. First, none of the promotion programmes had ended, so final impact indicators were not available. In theory, the types of impact indicators set and compiled by independent evaluators would provide evidence that the policy's specific objectives are met. However, these are reported once a programme has been completed and, therefore, these were not available for this evaluation³⁶. By the end of 2020, output, result and impact indicators are expected to be available only for the multi programmes that ended in the first part of 2020 (three-year programmes selected in 2016 and two-year programmes selected in 2017).

Second, the range of indicators used in the different programmes made it impossible to use them to assess the promotion policy overall. For example, it was impossible to aggregate impact indicators for different products promoted in different target countries, and it was inconsistent to merge samples of multi programmes with simple programmes.

Third, many of the result indicators did not allow for meaningful conclusions to be drawn on the effectiveness of the promotion policy, because in many cases the intended results would not be sufficient to support the generation of impact assessments on the promotion policy's specific objectives.

Fourth, the causality between the promotion policy and changes in market share and awareness is difficult to measure with the present monitoring and evaluation framework. As far as the quantitative impact of the promotion programmes on the market is concerned, although some trade data are available, it is thus not possible to equate the activities of the campaigns to increases in consumption or market share of the specific products and conclude there is a causal link. This is due in part to the size and diversity of the market, which makes it difficult to attribute broader trends to the specific activities of any individual programme³⁷. The speed of change in the food and drink sectors can also make it difficult to attribute observed changes to any specific promotion programmes.

As pointed out, the timing of the evaluation³⁸ meant that no programmes were yet complete, which hampered the ability to fully assess the effectiveness of measures at this time. Second, the range of different programmes and Commission own initiatives meant that a 'one-size-fits all' approach could not be applied to analyse all programmes and initiatives. Instead, it was necessary to make a purposeful selection of case studies to provide an in-depth analysis indicative of the bigger picture though not representative of all programmes. Third, estimating the costs and benefits of the promotion policy in quantitative terms proved unfeasible due to lack of comprehensive data. As a result, the assessment of links between operational and administrative aspects and efficient achievement of results had to be based primarily on the qualitative data collected. The simplification of procedures and processes in the reformed promotion policy did not produce more quantitative data for a cost benefit analysis. It is important to keep these aspects in mind when analysing and interpreting the results of the study.

³⁶ Self-reported impact indicators are available for multi programmes, but these should be used with caution as they are not the final ones.

³⁷ For a more detailed description, see part 5.1.2 of the evaluation support study.

³⁸ See Chapter 1 Introduction.

A further challenge relates to the difficulty to isolate specific effects of the promotion policy measures from the influence of contextual factors, which was addressed by analysing the promotion policy within a wider context. Nevertheless this is a residual limitation of the evaluation.

The 144 replies received in the public consultation result in a low statistical significance.

5. ANALYSIS AND ANSWERS TO THE EVALUATION QUESTIONS

The evaluation gives an assessment of the effectiveness, efficiency, coherence, relevance, and EU value added of the EU agricultural promotion policy on the basis of six evaluation questions.

5.1 Effectiveness

Two evaluation questions aim at assessing the extent to which the EU agricultural promotion policy has been effective in achieving its specific objectives and the general objective to enhance the competitiveness of EU agricultural products, and to assess how the policy design has contributed to its effectiveness. The assessment is based on data available from the document review, online survey, interviews and evidence from case studies conducted in the support study.

5.1.1 Effectiveness in achieving the specific objectives and the general objective to enhance competitiveness

Increased awareness of merits and high standards

Given the multiple limitations of the analysis (explained in chapter 4), it is difficult to quantify the extent to which the promotion policy is effective in contributing to increasing the awareness of the merits of EU agricultural products and the high standards applicable to EU production methods, or the exact size and profile of the target group reached in internal and external markets. The evaluation study³⁹ found that there is stakeholder consensus that EU policy and programmes contributed to raising awareness and reaching the target groups, at least to some extent. It also found evidence to confirm the promotion of messages on the merits of EU agricultural products.

The stakeholder survey responses showed that most stakeholders (proposing organisations, implementing bodies, national competent authorities) agreed that the EU agricultural promotion policy had reached the target audiences of the programmes (both EU and non-EU target audiences). A comparative analysis of the online survey responses across the different objectives shows that:

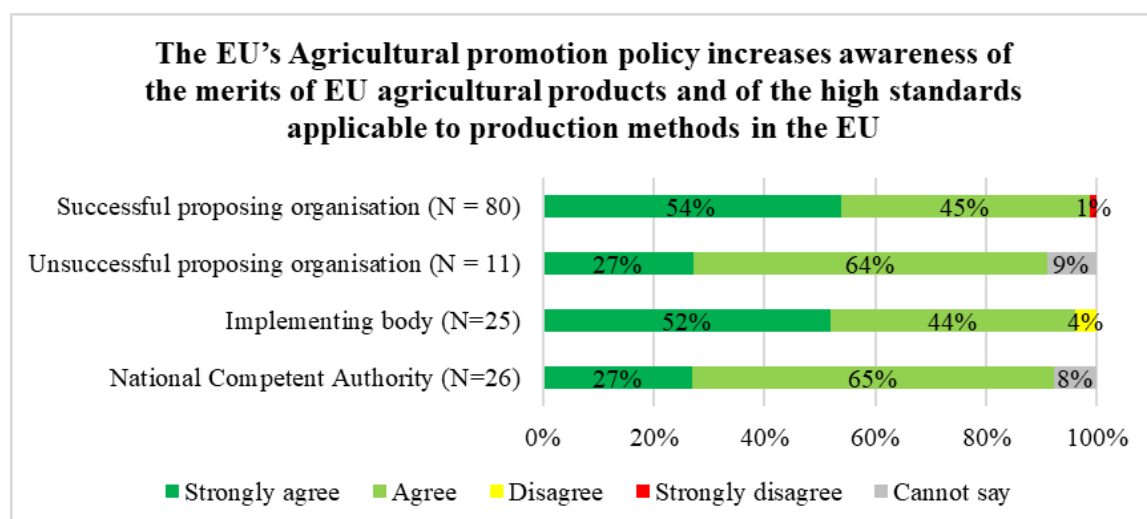
- proposing organisations and implementing bodies are mostly positive about the effects of the EU agricultural promotion policy. Notably it has raised awareness of the merits of EU products and the high standards applicable (51% (59) strongly agreed), it increased awareness and recognition of EU quality schemes (42% (49)

³⁹ https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cmef/regulation-and-simplification/evaluation-support-study-eu-agricultural-promotion-policy-internal-and-third-country-markets_en

strongly agreed) and it has contributed to enhancing the overall competitiveness of the EU agricultural sector (42% (49) strongly agreed);

- national competent authorities were most positive about the promotion policy's effectiveness in achieving the policy's general objective;
- both the national competent authorities and the proposing organisations surveyed had slightly less confident views on the policy's effectiveness in achieving specific objectives relating to increasing consumption and market share.

Figure 2 Stakeholder perception in the EU on the awareness of the merits of EU agricultural products and high standards of production



Source: support study (adaptation)

According to Eurobarometer No 504⁴⁰ released in October 2020, 81% of respondents are aware of the merits of EU agriculture in terms of high standards.

The reform brought in the mandatory use of the signature 'Enjoy! It's from Europe' in the visuals of the promotion measures. The support study showed different levels of appreciation of that signature by target audiences in the EU and in non-EU countries. While reaching the target audience appears to be easier within the EU, the message stressing quality standards of products was more relevant in non-EU countries, where it was associated with other values such as safety and tradition. The signature was generally well received with some minor concerns raised, such as the generic nature and limited use of brands and specific country origin. Target audiences in non-EU countries may have limited knowledge of individual countries in Europe, but they do understand where Europe is and can usually easily associate the signature with Europe. Most stakeholders agreed that, to the extent of their knowledge, the signature is starting to gain widespread recognition in non-EU countries. About a quarter of the stakeholders noted that signature identification is still not as high as hoped for. However, they agreed that the level of awareness is slowly increasing and gathering momentum and that keeping the same "signature can help boost recognition.

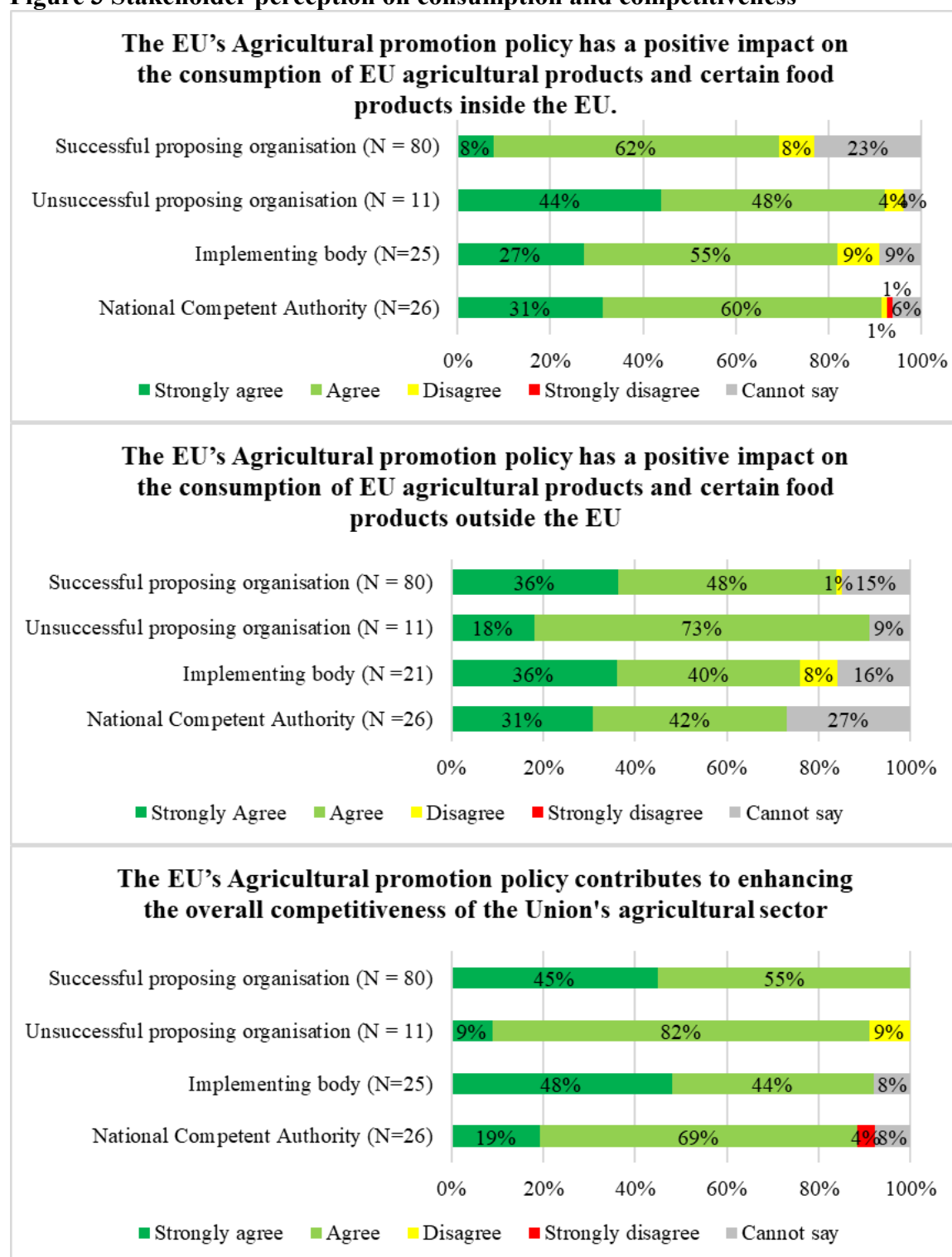
⁴⁰<https://ec.europa.eu/commfrontoffice/publicopinion/index.cfm/survey/getsurveydetail/instruments/special/surveyky/2229> (page 16).

Increased competitiveness, consumption and raised profile

The exact effect that the promotional policy had on the level of consumption and competitiveness of EU agricultural products is very difficult to calculate, notably due to the timing of the evaluation and the many external factors (political, legal and regulatory changes, broader economic developments, etc.) that influence sales and consumption.

Although case studies of promotion programmes for selected sectors (wine, beer and vinegar, fruit and vegetables and meat) proved inconclusive in terms of assessing the impact on competitiveness, the stakeholders consulted in the support study expressed a positive perception of the policy's effects on consumption and competitiveness, with respondents from the dairy sector being the most positive regarding the effects on overall competitiveness and respondents from the meat sector the least positive.

Figure 3 Stakeholder perception on consumption and competitiveness



Source: support study (adaptation)

This positive perception is echoed in the replies to the public consultation. Most respondents agreed that the EU's promotion measures both on the EU market (71% (102)

of replies) and outside the EU (62% (89) met the objective of increasing competitiveness⁴¹.

The case studies provided some evidence, e.g. for EU fruit and vegetables marketed in the United Arab Emirates, that the selected programmes contributed to increased sales and consumption in the target markets, with programmes targeting non-EU markets having a higher potential than programmes targeting the EU market.

The case study interviews also highlighted that activities focusing on direct contact with consumers, networking at trade fairs and events, product promotion by influencers and using social media instead of journalists in promotional campaigns were found to be particularly effective in increasing competitiveness and consumption.

Awareness and recognition of quality schemes

Special Eurobarometer No 473⁴² provides a useful picture of consumer perception, highlighting the relative importance of EU quality labels on purchase decisions (albeit EU consumers lack awareness of the schemes⁴³). In 2018, one third of EU respondents were not aware of any of the EU quality labels, but 63% of respondents were aware of at least one of the logos. According to the latest EU-wide survey of public opinion on agriculture and the CAP (Eurobarometer 504), in 2020, 57% was aware of the organic label, 14% of the ‘protected designation of origin’ label and 20% of the ‘protected geographical indication’ label⁴⁴. The survey found a significant increase in the EU (+30 percentage points) in recognition of the EU organic label and a consistent increase of the fair trade and protected geographical indication labels since 2017, recognition of the other EU quality labels remaining stable over the reference period.

It is difficult to assess the effects of the promotion of EU quality schemes on consumer perception, given the lack of data on recognition in non-EU markets. The in-depth interviews at EU level indicate potential of the programmes targeting EU and non-EU markets with awareness-raising activity on quality schemes, rather than evidence of this in practice. However, since the promotion policy included organic produce, the awareness of the organic label increased with 30 percentage points between 2018 and 2020 (Eurobarometer 504), which can be partly attributed to the impact of the promotion policy. There was also a slight increase in the level of awareness of the ‘protected geographical indication’ label while awareness of the other EU labels remained the same.

⁴¹ Public consultation on the evaluation of the EU agricultural promotion policy. <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/1859-Evaluation-of-the-EU-agricultural-promotion-policy/public-consultation>

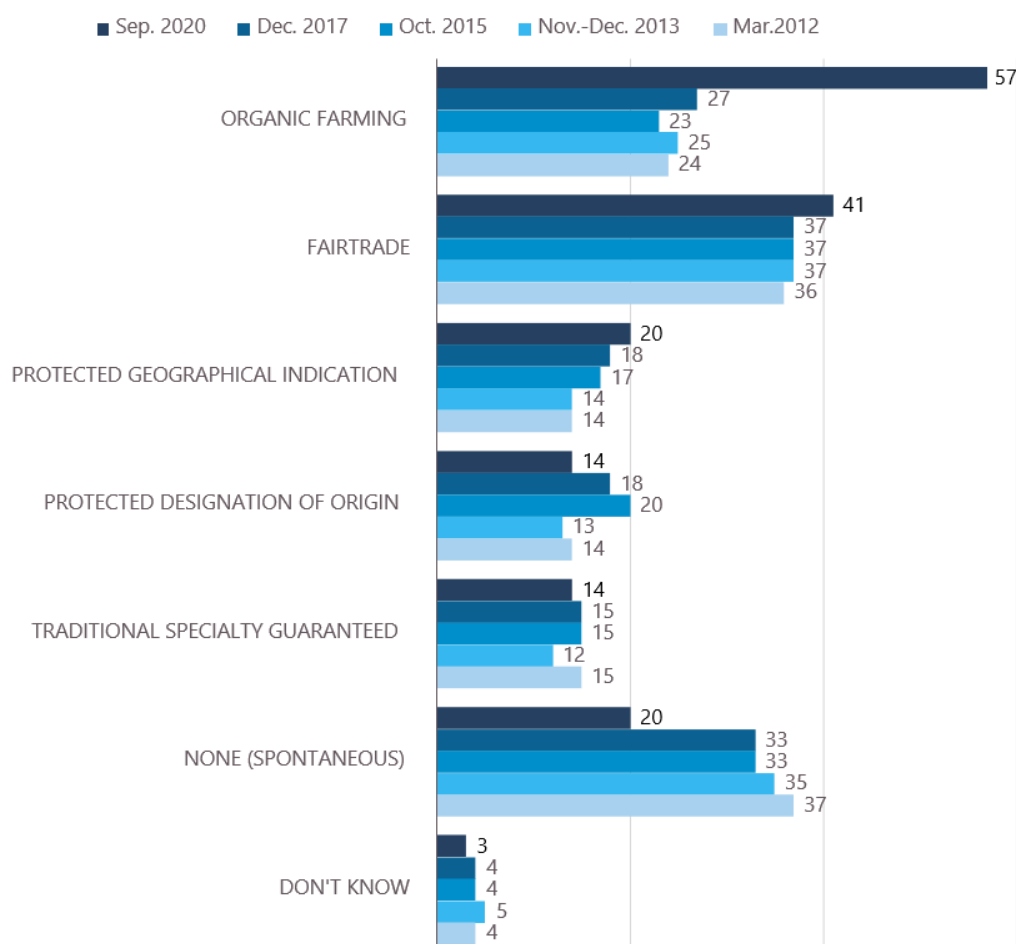
⁴² Special Eurobarometer No 473: Europeans’ Attitudes Towards Food Security, Food Quality and The Countryside, February 2018.

⁴³ The Fairtrade logo (not an EU logo!) achieved the highest recognition (37%), followed by the EU organic farming label (27%), the protected designation of origin and protected geographical indication logos (both 18%) and 15% were aware of the traditional speciality guaranteed logo. Awareness varied considerably by Member State. For example, respondents in France (45%), Italy (32%) and Greece (31%) are the most likely to be aware of the protected designation of origin, while those in Romania, Malta, the UK and Denmark (all 5%) are least likely.

⁴⁴ See footnote 31 (page 16).

Figure 4 Substantial increase in awareness of the organic farming logo, while all others remain stable

3 Which of the logos are you aware of? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)

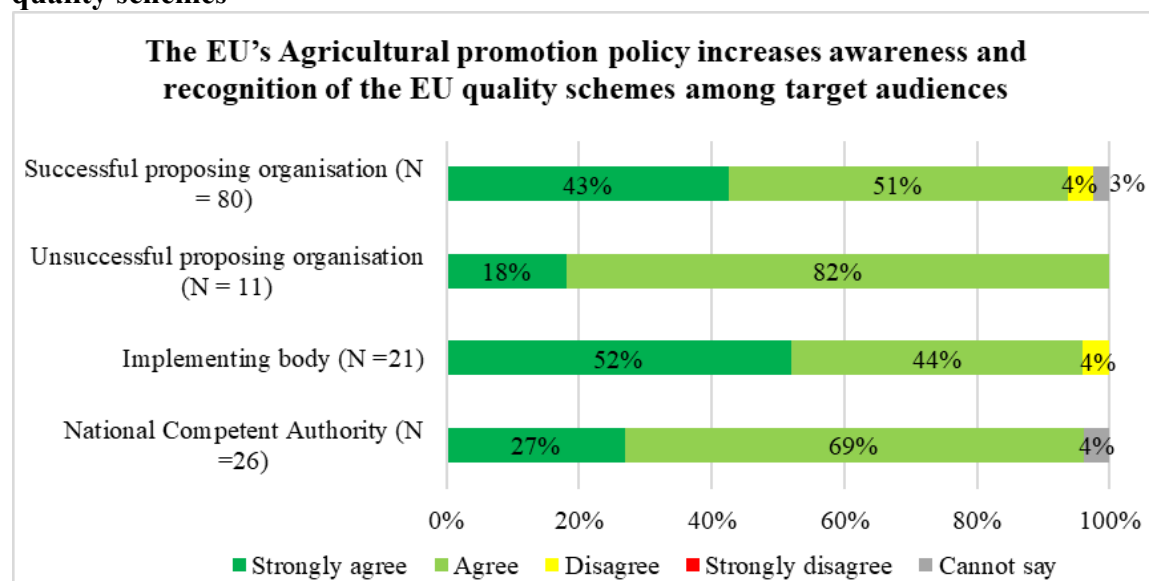


Source: Eurobarometer No 504, October 2020

The stakeholders interviewed or who responded to the online survey were confident that the programmes had contributed to increasing awareness and recognition of the quality schemes. Over 95% of stakeholders considered that the agricultural promotion policy had increased awareness of the EU quality schemes among target audiences.

The case studies confirmed that differences in the level of awareness of quality schemes can have an effect on success (with lower initial levels of awareness making it harder for programmes to achieve an increase). The case studies covering non-EU markets showed the promotion of quality labels did have some traction (for example on the US market for wines and spirits) but also challenges, such as perceived consumer indifference to the labels (in the United Arab Emirates).

Figure 5 Stakeholder perception on the level of awareness and recognition of EU quality schemes



Source: support study⁴⁵ (adaptation)

Influencing market share

Desk research conducted as part of the case studies showed an increase in both sales and exports of several EU agricultural products promoted by the programmes. However the extent to which the promotion programmes (200 contracts signed over the period 2016-2018 excluding abandoned programmes) contributed to these results is impossible to assess, given the large number of factors affecting the market⁴⁶.

Stakeholders agree the promotion policy has had an effect on influencing the market share of the EU agricultural products, in particular by providing support to help EU producers enter certain new markets. This is particularly effective for non-EU markets⁴⁷ though reports on programme-level results confirm that, at this point, there is limited concrete evidence to substantiate this perception. Regarding promotion campaigns for EU wine, beer, spirits and vinegar in the USA, all coordinators, consortium partners and implementing agencies interviewed for this case study reported anecdotal evidence of increased sales on the US market. There has been an increase in the sales value of EU exports to the US over the evaluation period for wine, brandy and gin/genever, suggesting that EU trade competitiveness increased in general over this period.

Interviewees stopped short of directly linking their increased sales to the awareness campaigns, but they did report significant investments by individual brands in sales and direct marketing, which is likely to have had a more direct and/or significant impact on

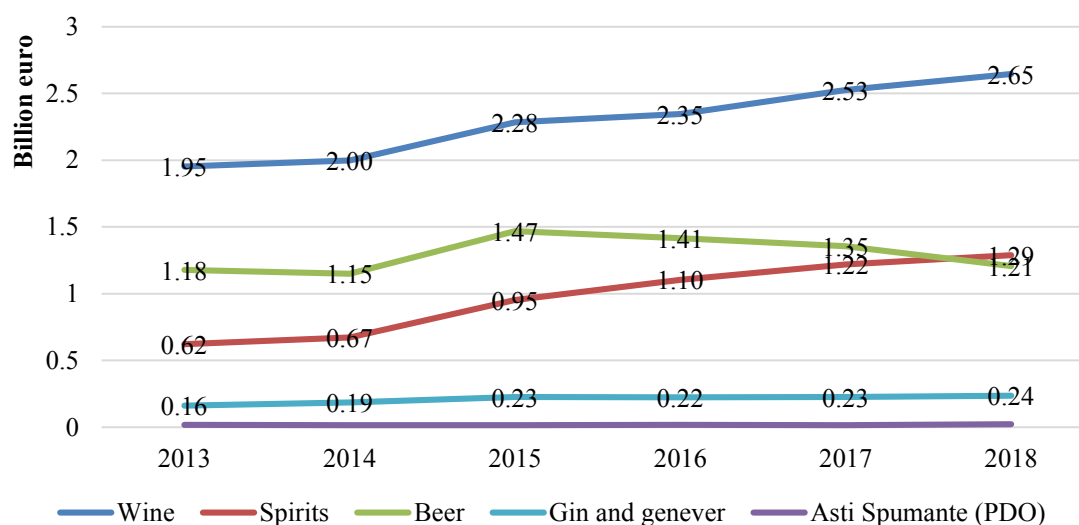
⁴⁵ https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cmef/regulation-and-simplification/evaluation-support-study-eu-agricultural-promotion-policy-internal-and-third-country-markets_en

⁴⁶ The number of export contracts signed following promotion activities (e.g. high-level visits mediated by the Commission) may provide an indication of the extent to which promotion programmes contributed to sales and exports.

⁴⁷ Notably, for EU wine sold to the USA, dairy products to China, fruit and vegetables to the United Arab Emirates and meat and fruit and vegetables sold on the EU market. See Annex 2 case studies.

sales. They perceived the campaigns as a ‘springboard’ or ‘starting point’ to educate influencers, opinion setters and ultimately consumers about the specific products promoted.

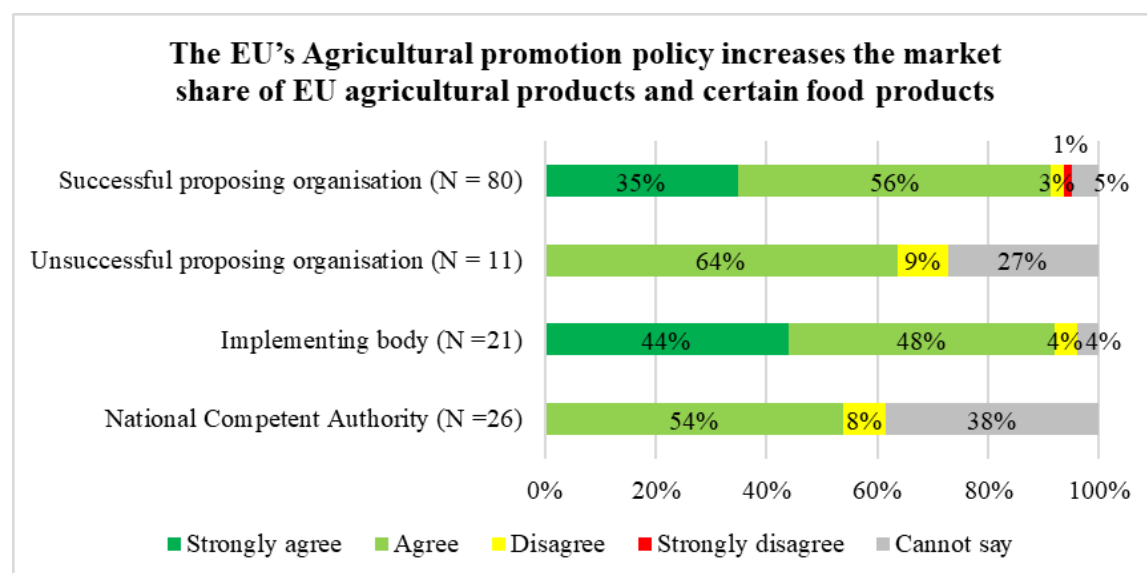
Figure 6 Export value of wine, beer, brandy and gin/genever from EU-28 to USA



Source: Eurostat (chart by Ipsos)

As illustrated by Figure 7, different stakeholders have very different views on the extent to which the promotion policy increases market share. Only 54% of responding national competent authorities thought that the agricultural policy increased the market share of EU agricultural products and certain food products, against 91% of successful proposing organisations, 64% of unsuccessful proposing organisations and 92% for implementing bodies.

Figure 7 Stakeholder perception of effect on market share

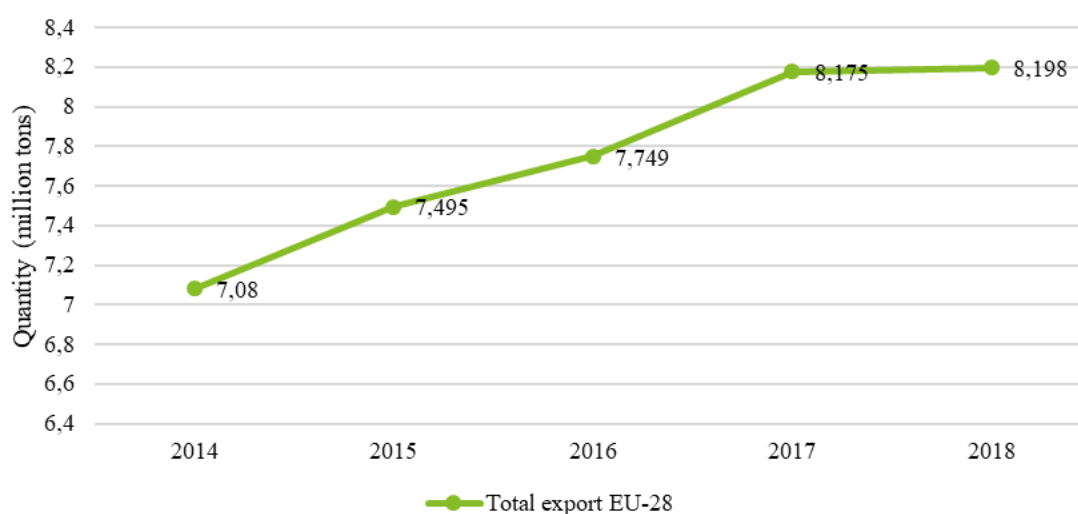


Source: support study (adaptation).

Case studies indicated that in most markets targeted by programmes, positive trends can be seen for the products promoted (in terms of increased exports or sales on the target market). Stakeholder interviews from case studies back up the perception that the promotion policy met its goal to target markets in non-EU countries with high-growth

potential. Figure 8 illustrates the example of the increase in EU exports of dairy products to China, which was the goal of several promotion programmes (see Annex 2).

Figure 8 Volume of total exports from EU-28 of dairy products to China



Source: CLAL (based on Eurostat and IHS) (2019-2019). Dataset EU-28: Dairy sector.

Though it is impossible to attribute fully these trends to the programmes funded, stakeholders suggest that the programmes make a positive contribution to these results.

Restoring normal market conditions

The effectiveness of the programme in addressing the specific objective of restoring normal market conditions cannot be assessed due to the lack of measures implemented over the evaluation period. The evaluation did not identify situations in which such measures should have been used in the evaluation period. Additional calls for proposals were launched for the first time on 30 June 2020 in response to the Covid-19 crisis.

The general objective of the EU promotion policy

Overall, the evaluation finds positive signs that the programmes funded are in line with the policy's objective to enhance the competitiveness of EU agricultural products and are making progress towards achieving the policy's specific objectives. However, a full assessment of the policy's effectiveness is premature. It should be carried out once the programmes have come to an end and the impact can be more fully assessed.

5.1.2 Contribution of the policy design to its effectiveness

Budget, co-financing rates and eligibility criteria

Feedback from the case studies and in-depth interviews indicated that, although the current level of co-financing (generally perceived to be relatively high) is considered appropriate to attract small-scale organisations, the successful organisations are usually the better resourced ones (and they are often able to seek support from organisations that would help implement the programmes if successful, i.e. advertising agencies). Smaller organisations are likely to be weaker not only in terms of their financial resources but other resources too, e.g. human resources or expertise in marketing and product

promotion, which in turn can have a negative impact on the extent to which programme measures are implemented effectively.

Proposing organisations and implementing bodies praised the levels of co-financing and budgets in terms of attracting proposals of satisfactory quality and ensuring effective implementation of the proposed measures.

The fact that the percentage of ineligible proposals decreased over the period 2016-2019 for both simple and multi programmes (except for multi programmes in 2017, where ineligibility went up temporarily) implies that organisations gradually became familiar with the new requirements and ineligible organisations ceased applying. However, the decrease may also be attributable to the action taken to better inform and guide applicants, via info days, frequently asked questions and other information published online (such as webinars and the eligibility checker).

Results from the online survey (covering both successful and unsuccessful organisations) combined with stakeholder views collected by means of in-depth interviews and case studies show that most stakeholders (survey respondents and interviewees) reported having a positive impression of the fairness of the rules (e.g. over half of all survey respondents agreed or strongly agreed that the eligibility criteria were fair).

A significant share of producers requested a larger budget for the promotion policy. In particular, most fresh fruit and vegetable producers favoured support for promotion campaigns in the EU market. Several respondents in the public consultation requested a higher contribution from the European Commission to the co-financing rates, and a two-step selection procedure that would reduce the submission costs. Some respondents asked for more flexibility on the financial arrangements such as more advance payments and interim instead of annual payments. Some underlined the need to digitalise reporting from proposing organisations to the Member States. They also emphasised the need to simplify the requirements during the selection of implementing bodies. Some suggested that two calls for proposals per year would be more adequate. Some Member States highlighted difficulties faced by smaller organisations in their countries who are not eligible, or do not have sufficient financial capacity to submit applications given the current rate of co-funding required.

Extended scope

Overall, the qualitative feedback on the scope of the eligibility rules was positive. No concerns were raised by those assessing the proposals; nor by those managing the process (i.e. CHAFEA and the national authorities). Proposing organisations described the extended scope as providing greater ‘flexibility’ and ‘freedom’ and thereby facilitating the effectiveness of the programmes by allowing organisations that may not have been previously eligible to be involved. EU-wide agricultural producer organisations also appreciated that the list of types of eligible products was extended. They specifically mentioned the inclusion of food-industry products, instead of only primary-agricultural products under the previous regime.

There was no evidence/examples of issues or problems caused by extending the scope of eligible proposing organisations and/or products such as ambiguity of rules, exclusion of relevant organisations to date. This is confirmed by all sources of input, including the online survey, case studies and in-depth interviews.

Most of the respondents to the public consultation had a positive (38%) or very positive (27%) opinion on the impact of extending the eligibility of proposing organisations and

the list of products for funding under promotion, with only 13% expressing a negative opinion.

Shared and direct management

Overall, respondents indicated a higher level of stakeholder satisfaction with management by CHAFEA than with management by national authorities. This relates partly to the fact that CHAFEA is better placed to administer the programmes, given its deeper understanding of the programmes and their underlying aims, as well as having the dedicated systems and experienced staff. Having sufficient management resources is more challenging for some national authorities than for others, which may have given rise to the other issues highlighted:

- national authorities' inconsistent interpretation of the guidelines and application of procedures and rules, which implies a need for greater harmonisation of rules to reduce confusion, ensure a level playing field for applicants and create more opportunities to exchange good practice;
- national authorities' difficulties in accessing the information they need and proposing organisations' difficulties in knowing which managing authority to contact for information (i.e. CHAFEA or national authorities). This remains an issue, even though the CHAFEA website provides exhaustive guidance and addresses many replies in the frequently asked questions;
- national authorities reported a lack of confidence in their approval and implementation of adjustments;
- proposing organisations perceived a lack of flexibility with budgetary/contractual or other adjustments in simple programmes, which means it is difficult to make the measures responsive to contextual changes.

Provisions on origin and brands

Approximately 40% of national and EU-wide organisations who responded to the online survey faced issues with restrictions on mentions of origin and the visibility of brands. The in-depth interviews and case studies revealed concerns about the extent to which the provisions on origin and brands were in line with the needs of proposing organisations. The most common concerns raised on the requirement to have the EU message as the primary focus are related to the:

- dissemination of the message that the product promoted is of 'European' origin, as it was suggested in the survey that there is typically significantly higher consumer awareness of a specific country or region than of 'Europe';
- disclaimer accompanying the EU message, stating that the EU is not responsible for the content of the message, which is confusing and self-defeating;
- restrictions on visibility that discourage involvement from stakeholders who are not willing to invest resources in a campaign that restricts to a large extent the mention of brands and origins;
- perception that multiple messages, brand-related outside the programmes and not brand-related inside the programmes, dilute the effectiveness of the measures;
- restrictions in mentioning the country of origin, which limit the effectiveness of the programmes as the national brand may sometimes be stronger and serve the campaign better than the fairly generic reference to 'European products'.

At the same time, the evaluation highlights the importance of examining the policy against the principle of non-discrimination and the fact that the policy is inherently an EU policy and not a national or private policy. In this context, given the complementary

nature of EU action in this area, ensuring that the EU message is the main message of the campaigns and the consequent restrictions in the provisions on origin and brands appear to support their intended purpose. Moreover, this approach safeguards related EU agricultural policies (such as on quality logos) and fulfils the principle of non-discrimination, which prohibits giving favourable treatment on the grounds of nationality.

All in all, when taking the above into consideration and in the absence of a counterfactual measurement which would indicate how different rules impact the effectiveness of the measures, it is challenging to establish a link between the concerns expressed by some stakeholders and the potential impact of these issues on policy effectiveness.

In addition, the 144 respondents to the public consultation had different, albeit mostly positive opinions regarding the new possibility to help promote EU agricultural and food products by allowing a restricted mention of the origin and display of brands on the visuals created: 16% consider it effective ‘to a large extent’, 35% ‘to a fairly good extent’, 27% ‘to some extent only’, only 4% replying ‘not at all’ and 19% ‘don’t know’.

Monitoring and evaluation system of the simple and multi programmes

According to available data, there is significant variation in the way that proposing organisations report on promotion programmes indicators (see table below on output indicators⁴⁸), and full compliance with the Commission’s requirements is not achieved. Indicator data was missing for 36 out of 110 simple programmes implemented in 2016 and 2017.

Information collected from the online survey, the in-depth interviews and the case studies lay bare a number of limitations with the current system:

- Most national authorities who participated in the online survey agreed that the monitoring and reporting system is clear, useful and proportionate. Most successful proposing organisations (78%) also agreed that reporting requirements are easy to understand. However, this perception is not confirmed by the findings from the case studies, where national authorities and proposing organisations reported difficulties to understand the content of simple programmes.
- National authorities in charge of simple programmes also reported difficulties in understanding the concept of the key performance indicators and how they should be used in the reporting process.
- Information collected from case studies and in-depth interviews suggests that proposing organisations and implementing organisations view the monitoring and evaluation system as work-intensive and demanding, especially when specific promotion services/activities are subcontracted. Reporting on indicators comes on top of time-consuming programmes that must be delivered on time. This seems also to relate to the issue of how well stakeholders understand the reporting process, as limited understanding makes the process more time-consuming, and restricts the scope to learn the monitoring process. Burdensome reporting can also

⁴⁸ Variation is also found in the reporting of the result indicators, although programmes were more likely to report on result indicators than output indicators taken as a whole. The average percentage of simple programmes reporting on output indicators was 47%, against 54% for result indicators. For multi programmes, the average percentage of simple programmes reporting on output indicators was 62%, against 70% for result indicators.

potentially have an impact on the effectiveness of the measures, as it limits the time available for design and implementation of programme activities.

Table 1 Number of output indicators reported in programmes

Indicator	2016 and 2017 Simple Programmes (N=74)		Multi programmes (N=16)	
	N=	% of total	N=	% of total
O1 Number of stands at trade fairs organised	60	81%	10	63%
O2 Number of seminars/workshops organised	48	65%	14	88%
O3 Number of press conferences organised	34	46%	10	63%
O4 Number of tastings days at points of sales organised	40	54%	12	75%
O6 Number of study visits organised	35	47%	8	50%
O8 Number of spots aired on TV	20	27%	9	56%
O9 Number of spots aired on radio	24	32%	8	50%
O10 Number of published print adds	42	57%	13	81%
O11 Number of published advertorials	26	35%	8	50%
O12 Number of published online adds	43	58%	9	56%
O13 Number of press releases	50	68%	15	94%
O14 Number of email newsletters sent out	27	36%	10	63%

Source: support study (based on data from DG AGRI and CHAFEA)

Additional observations can be made about the indicators:

- The current indicator framework described in the Regulation is incomplete: the three levels of indicators are not sufficient to capture the effects of the simple and multi programmes. In a performance chain, each step of the chain should, at least in theory, generate the next level of effects. However, there is a missing step between the stated ‘results’ and the intended ‘impacts’. For example, it is difficult to ascertain that there was a direct link between the number of website visits or event participants and an increase in consumption.
- The allocation of indicators to the headings outputs, results and impacts are less than clear and usable. Some impact indicators currently listed can be beyond the direct scope of impact of simple and multi programmes, even if the programmes may have some influence on these aspects. Impact indicators such as change in market share may mainly result from agricultural market dynamics: world prices, quantities harvested, etc. Promotion and commercial activities cannot change these dynamics on their own and should be complemented with other tools.
- At the results level, there is a focus on quantitative indicators (on the number of target audience reached, number of press coverings, value of press clippings and number of subscribers to a newsletter). As they currently stand, indicators at this level require mostly quantitative data that attempt to provide a straightforward numerical description of the issues/success of the programmes and steer the policy response in a specific direction, and to easily measure the success or failure of a programme. This design of the indicators, especially those tracking results and impact, lacks recognition that data on the promotion policy continue to be subject to contextual and other limitations, which would require systematic reporting of qualitative information.

Overall, the evaluation finds that there is greater satisfaction with the system as rolled out for multi programmes than for simple programmes due to CHAFEA providing more support for multi programmes than national authorities do for simple programmes and because multi programmes with their international scope are more powerful in achieving results.

Once complete, it will be difficult to assess programme impact because relevant indicators have been difficult to calculate, and therefore the focus of monitoring and evaluation is on outputs and results and not impact. There are difficulties and costs in capturing robust evidence on impacts due to the likely weak causal effects of information and promotion measures on, for example, impacts such as market share. This situation is exacerbated by the difficulties experienced by proposing organisations in understanding how to set appropriate indicators and systems to capture the required data, and by the administrative burden in the reporting process, which some stakeholders found excessive.

Overall, a general lack of focus on the quantitative effects makes it difficult to assess at the aggregate level how target audiences have responded to the information they received and whether improvements could be made across the programmes.

5.1.3 Commission own initiatives

The assessment of the extent to which Commission own initiatives contributed to the effectiveness of the promotion policy is based on available Commission data, desk research and interviews with key stakeholders.

The limited evidence gathered on technical support, which account for a small proportion of the budget (4%) and 19% of the contracts signed for allocated to Commission own initiatives, suggests it does provide cross-cutting support to EU agricultural organisations on the type of support available and how to access it. The portal created to help potential applicants and the webinars have, according to feedback from the surveys, improved understanding of the promotion policy, of market opportunities and of the new rules for applications.

The high-level missions (accounting for 25% of awarded contracts under own initiatives and 13% of the budget), are part of the EU's economic diplomacy activities. They appear to be successful at facilitating market access for EU agri-food products by successfully raising awareness. An overwhelming majority of attendees reported a level of satisfaction of over 90%, as well as new contacts being concluded as a result of these missions.

Trade fairs, which account for 17% of the budget and 22% of contracts awarded, proved to be particularly successful and an effective communication channel to support awareness raising of the merits and quality schemes of EU agricultural products (e.g. quality standards and geographical indications). Positive feedback was reported in all cases (90%).

The assessment found a high level of satisfaction with EU product quality/SPS (sanitary and phytosanitary standards) seminars, which account for 9% of the budget and 19% of overall contracts awarded, involve government officials and business representatives from the sector providing information on EU products and standards (over 90%). Most participants reported an increased knowledge of EU standards and of the merits of EU agricultural products.

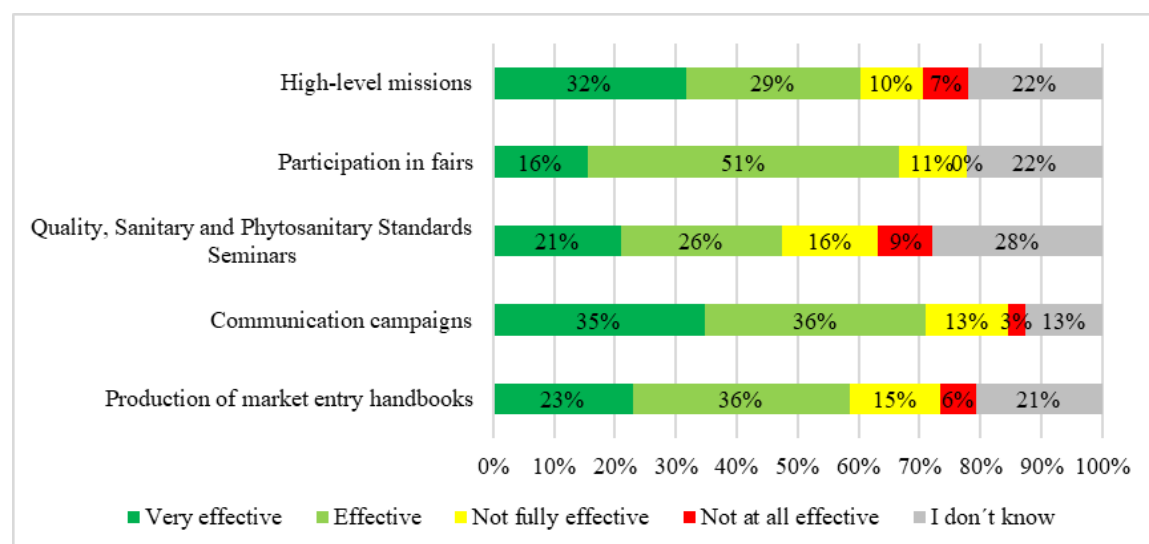
Communication campaigns, which accounted for the largest share of budget (56%) aim to follow up on other own initiatives and support EU-led business delegations engaging for the first time with target audiences in non-EU countries. The data available indicate

that such campaigns have successfully increased the target audience's understanding of EU products and their quality.

As above, the assessment found that action under Commission own initiatives:

- contributed to increasing awareness among stakeholders in non-EU markets, which helps create a favourable environment to promote EU agri-products and helps boost the competitiveness of EU products;
- contribute, to some extent, to the objective of increasing the awareness and recognition of the merits and high standards of EU products, and of quality labels;
- increase consumer awareness of the merits of EU agricultural products, notably the presence at international trade fairs and visits of EU stakeholders;
- consistent targeting of certain countries since 2017 improved the effectiveness of measures (as shown by the increasing success of initiatives in China⁴⁹).

Figure 9 Effectiveness of EU promotion measures (Commission own initiatives) (in %)



Source: public consultation 2020, 144 respondents

Most respondents to the public consultation expressed positive views about the effectiveness of EU promotion measures: communication campaigns (71%), participation in fairs (67%) and high-level missions (60%), production of market entry handbooks (59%). Only 47% gave a positive assessment on the effectiveness of seminars.

Monitoring and evaluation system of Commission own initiatives

Given that some initiatives were still ongoing or closed recently, only a limited assessment of the quality of reporting was possible. The assessment reveals that key performance indicators give a sense of the results and outcomes, but provide limited information on impact (it is difficult to draw a link between individual initiatives and changes in market conditions). They mainly track the perceptions of participants, giving rather limited evidence of quantifiable impact (e.g. number of contracts signed, increase

⁴⁹ See Annex 2, Case study 2: European Dairy Products in China.

in sales). There was a lack of standardisation at EU level of project-specific indicators for all projects.

Overall, the usefulness of reporting could be improved by having clearer definitions of specific expected results (e.g. in terms of targets), of performance measures and systems to collect data. CHAFEA and DG AGRI have already remedied this weakness by streamlining the set of indicators and clarifying the methodology for measurement.

5.2 Efficiency

The evaluation found that the promotion policy is broadly efficient but efficiency can be improved, for example by better quantifying the costs and benefits. Due to limitations of the monitoring and evaluation system and the lack of completed projects, the costs and benefits of most promotion measures could not be measured. Where impact could be measured precisely e.g. the pig meat programme in China that increased awareness of intrinsic values of the Union agricultural products with 18 percentage points and the cheese programme in Columbia and Mexico generating a market share increase of 16 and 11 percentage points respectively, the attribution of the impact to the policy is difficult as also other factor can have played a role. The same applies to the positive outcome of promotion programmes shown in the six case studies described in Annex 2 of the evaluation support study⁵⁰:

1. Wine, beer, spirits and vinegar in the USA
2. Dairy products in China
3. Fruit and vegetables in the United Arab Emirates
4. Products recognised under European quality schemes in the EU market
5. European meat on the EU market
6. Fruit and vegetables in the EU market

Another challenge to make a quantitative assessment on the efficiency of the EU agricultural policy is the question: What are reasonable costs to achieve benefits in terms of awareness, consumption and market share? The evaluation support study shows that the marketing budgets of private companies can be two digit amounts in billion euro whereas competitors like USA and Australia spend relatively higher amounts on their promotion policy. Calculations regarding the costs for the output of Commission own initiatives show that these strongly differ per output unit for different initiatives.

Despite the change brought about by the reform of 2014 (that entered into force in 2015), as regards the system of application, application submission, evaluation, selection, management of promotion programmes and technical support provided to the proposing organisations, one third of respondents (36%) still found that the new system for EU

⁵⁰https://ec.europa.eu/info/food-farming-fisheries/key-policies/common-agricultural-policy/cmef/regulation-and-simplification/evaluation-support-study-eu-agricultural-promotion-policy-internal-and-third-country-markets_en

agricultural and food products promotion is not very efficient. By contrast, 30% of respondents had a positive opinion and 10% were very positive.

Administrative burden

Overall, respondents found that the system placed a substantial administrative burden on applicants in preparing an application, though this lessens with repeated applications as applicants learn. This means that applicants with the capacity to apply more regularly, i.e. those who are financially stronger and have more resources, have an advantage to some extent. The case study interviews provide some evidence that the level of support provided by national authorities correlates with the level of participation in agricultural policy promotion programmes. The difference in support has knock-on effects in terms of the workload for applicants and leads to the perception of an uneven playing field between applicants from different countries.

As of 2016, over 50% of selected proposals were submitted by applicants who had never received promotion policy funding before, evidence that the revised eligibility conditions concerning proposing organisations had helped widen the base of potential applicants.

Regarding the workload of national authorities is concerned, case study evidence highlighted differences in national authorities' knowledge of the policy, rules and procedures. The support study found that, at times, many national authorities were unable to answer questions raised by applicants and had to ask the Commission for support. Proposing organisations and implementing bodies consulted in the case studies also emphasised their frustration with the lack of information available and an inability to get specific responses; they spent a substantial amount of time trying to understand the responses provided by national control authorities and some even asked directly the Commission and CHAFEA for support. These differences in knowledge of the policy, rules and procedures had an effect on how much time and effort national authorities were able or willing to spend assisting proposing organisations in applying for and managing programmes and how strictly they applied the rules set under the Regulation.

Although 45% of national control authorities that responded to the support study survey felt that there was no need to change the current management systems of simple programmes, 36% said it should be changed. Eight national control authorities made some specific suggestions for changes, with four noting the need for more guidance on the interpretation and application of rules (to ensure equal treatment across all Member States).

Costs and benefits

Due to the difficulty in quantifying benefits, a comparison of costs and benefits cannot be established for simple and multi programmes. This is largely due to lack of quantitative data on the benefits such as the change in the competitive position after the intervention. Data on the costs and result indicators have enabled a partial quantification of the costs and benefits of Commission own initiatives such as audiences reached and the number of visitors to fairs as well as the costs involved (Annex 7).

In summary, the evidence indicates that there are some areas for improvement in terms of efficient implementation of promotion measures and technical support. Clearer communication between the contracting authority and sub-contractor on the expectations of speakers and any preferences may help prevent future issues in delivering technical and promotional support (such as the need to cancel webinars).

The evidence from high-level missions and trade fair reports indicates that these visits have been implemented efficiently, with clear examples of contractors using their initiative to overcome barriers, particularly last-minute schedule changes which are (to some extent) par for the course with this type of event. Nonetheless, delays to approval processes were highlighted as one aspect to improve and give more time for organisation and implementation.

There is limited information, in particular on impact indicators, to assess all aspects of efficiency related to the Commission initiatives. Different methods are used to calculate the number of participants and the use of different metrics such as 'PR value'⁵¹ and 'number of articles' to measure the value of media coverage, which means that there is no comparable cost data for high-level missions and trade fair events. Table 13 in Annex 7 illustrates the cost and benefits of high-level missions and trade fairs and provides an overview of the budget, estimated cost per participant and estimated value of media coverage for each event.

Most respondents to the public consultation reported that the EU budget for promotion programmes yielded the expected results either fully (20%) or partially (63%), with 4% reporting that the available budget did not yield expected result at all, 2% stating 'on the contrary' and 10% had no opinion.

5.2.1 Efficiency of direct management of multi programmes compared to shared management of simple programmes

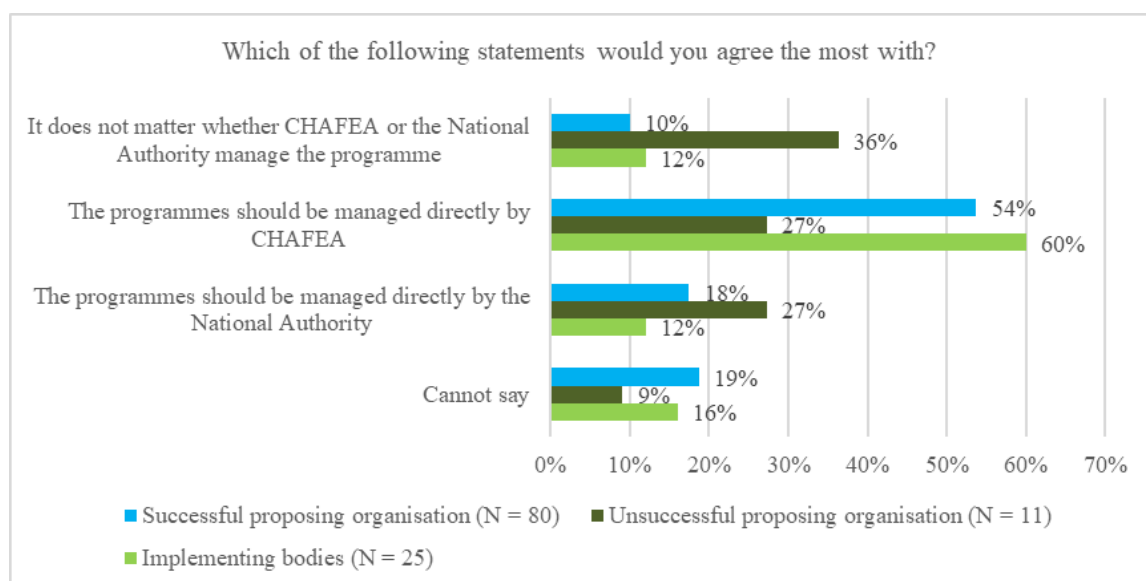
The assessment is based on the information collected through desk research, an online survey, interviews and case study interviews. It looks at the rationale for and perceived advantages of direct management of multi programmes, the differences between feedback from proposing organisations of multi and simple programmes and their management, and issues of the management modes in the context of specific measures.

There appears to be an emerging consensus amongst all stakeholders that the direct management of multi programmes by CHAFEA was more efficient than the shared management of simple programmes. This can be traced to a number of main factors:

- stakeholders perceived the use of digital reporting methods as much more efficient than paper methods. This has implications for the simple programmes, where the first step in the reporting process (for proposing organisation coordinators to send to national competent authorities) is still paper-based;
- the standard approach taken by CHAFEA to apply the rules governing applications, grant management and reporting, compared with a range of procedures (and, by implication, differences in terms of flexibility and rigour in applying certain rules) between Member States;
- CHAFEA is credited with providing more useful information in response to queries raised by proposing organisation coordinators on project management, which leads to longer term efficiency in implementing multi programmes (due to a higher level of certainty of the rules) compared to simple programmes, where there is less flexibility and more fear of strict and opaque financial audits.

⁵¹ PR value is calculated by multiplying the advertising rates by the share of a page an advert covers.

Figure 10 Preferred management system



Source: support study

These findings are backed up by the replies to the public consultation, where a clear majority of the respondents (60%) considered direct management to be more efficient than shared management, with 32% considering it ‘far more efficient’ and 28% ‘more efficient’. Only 10% of respondents replied ‘less efficient’, 5% of respondents found ‘no difference’ and 25% had no opinion.

5.2.2 Efficiency of the application system (requirements, submission, evaluation, selection, management and technical support)

The assessment is based on information collected through desk research, the online survey, interviews and case study interviews. It looks at the length and cost of the application process, the extent to which applicants, programme managers and evaluators perceive the application process, requirements and support available to be proportionate, and issues of the application system in the context of specific measures.

The evidence collected indicates that the application process is time-consuming and work-intensive for applicants (with some organisations hiring external consultants to help them prepare and submit the proposals). However, applicants are clear on the eligibility criteria and deemed it quite efficient. The number of ineligible proposals decreased over the period 2016-2019 for both simple and multi programmes, and interviewees who responded to the survey conducted during the support study reported that the eligibility criteria were clear and that the time required to complete the application process does decrease after applying for funding several times. However, although it has decreased, the ineligibility rate remains at 10%.

On the award criteria, stakeholders requested more clarity and transparency on how proposals are awarded. However, they reported that applying for funding and drafting proposals that respond to the award criteria becomes easier after having applied a couple of times, implying that increased exposure to and experience with the application procedure increases familiarity with the process. However, there are significant differences in the level of guidance and support provided to proposing organisations by national competent authorities during the application process.

The public consultation yielded mixed views regarding the efficiency of the new EU system for the promotion of EU agricultural and food products, with 40% of respondents providing a positive opinion, 38% an unfavourable opinion and 23% no opinion.

5.2.3 Efficiency of the rules applied by Member States governing the procedure for selecting implementing bodies

The assessment is based on information collected through the online survey, interviews and case study interviews. It looks at the differences in how the rules are interpreted and applied by different Member States, and the reasons, the extent to which proposing organisations find the procedure for selection of implementing bodies efficient, and the issues, problems, effects of the application system in the context of specific campaigns and measures.

The evidence indicates that the procedure for selecting implementing bodies was very work-intensive and therefore expensive, although the process seems transparent and fair, as measured by the final selection of implementing bodies. Feedback from interviews and case study research shows that proposing organisation coordinators invest significant time in understanding and complying with the rules for selecting implementing bodies, particularly for simple programmes.

However, there are differences in the rules applied by Member States (both according to their national laws, but also in the level of strictness with which certain requirements are implemented), which directly affects the efficiency of the selection process. The rules governing the selection of implementing bodies appear to be applied more strictly for simple programmes than for multi programmes. Given the difference in rules applied by Member States under their national laws and the interpretation of rules by national authorities (for simple programmes) and by CHAFEA (for multi programmes), this increased efficiency over time only works if the proposing organisation-coordinators and implementing bodies work on consecutive programmes, and therefore have continued exposure to the programmes and are able to gain familiarity with the rules and requirements. This could therefore also be perceived as giving an unfair advantage to 'old hands'.

There was no clear conclusion from the public consultation on the efficiency of rules applied by the Member States concerning the procedure for selecting implementing bodies, 43% of replies gave a positive opinion on the efficiency, 25% a negative opinion and 32% were undecided.

5.2.4 Efficiency of Commission own initiatives

Due to the limited information from the online survey, interviews and case study interviews, the assessment relies primarily on a review of the reports provided by the organisations contracted to implement services. It looks at the unit cost of Commission missions, pavilions, seminars per participant/visitor/article etc., the extent to which stakeholders perceive additional value from the Commission own initiatives, as well as the issues, problems and effects of specific Commission initiatives and the way they were carried out.

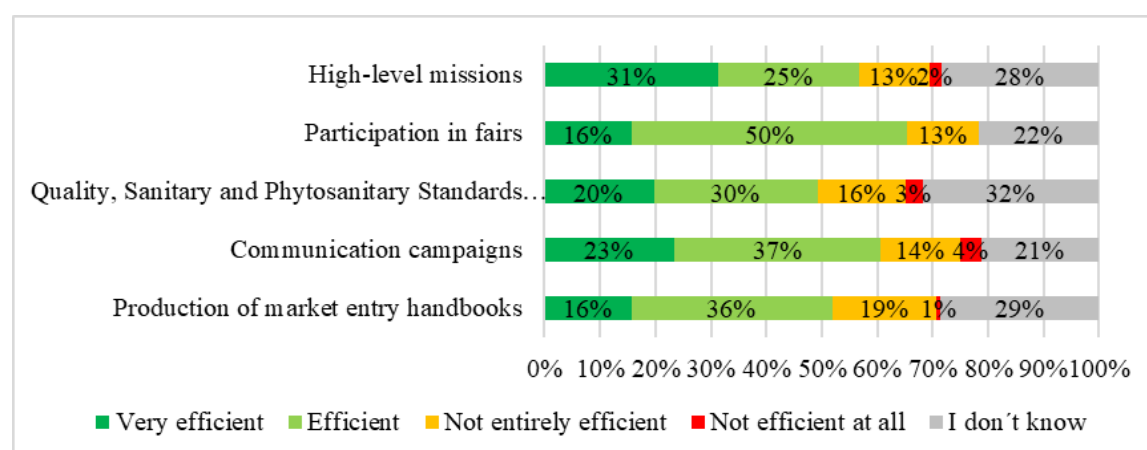
The findings indicate that there are some areas for improvement in terms of the efficiency of implementing promotional activities and technical support. Clearer

communication between the contracting authority and sub-contractor on the expectations of speakers and any preferences may help prevent future issues in delivering technical and promotional support (such as the need to cancel webinars).

High-level missions and trade fair report evidence indicate that these initiatives have been implemented efficiently, with clear examples of contractors using their initiative to overcome barriers, particularly last-minute schedule changes (which are to some extent usual for this type of event). Nonetheless, delays to approval processes were identified as an aspect to improve to help provide more time to organise and run the initiatives.

Figure 11 presents the results of the public consultation. Most of the replies gave a positive opinion on the efficiency of EU promotion measures: participation in fairs (65%), communication campaigns (61%), high-level missions (57%), and the production of market entry handbooks (52%), with the exception of seminars (49%).

Figure 11 Efficiency of EU measures in supporting the EU promotion policy (in %)



Note: The differences in aggregate numbers presented in the text are due to rounding up.

Source: public consultation.

Limited information is available to assess all aspects of efficiency related to Commission initiatives. There are different methods for calculating the number of participants and the use of different metrics such as ‘public relations value’ and ‘number of articles’ to measure the value of media coverage, which means that there is no comparable cost data for high-level missions and trade fair events.

5.2.5 Efficiency of the facility for organisations to submit several programmes in several topics

The assessment is based on the information collected from document and data reviews, the online survey and interviews. It looks at the take-up of the facility for organisations to submit several applications, the extent to which proposing organisations value the ability to submit applications for several programmes and how this has contributed to the efficiency of the application and management process, as well as other aspects related to multiple submissions.

The evidence indicates that stakeholders welcomed the scope to apply for several programmes as it increased their familiarity with the application process, and, for previously unsuccessful applicants, allowed them to learn from feedback and improve their knowledge of the application process.

Proposing organisation coordinators and implementing agencies managing more than one programme believed that efficiency gains can be made in implementing initiatives by applying learning across multiple programmes. The survey responses from evaluators highlighted the potential for resourcing difficulties if proposing organisations and implementing bodies receive funding for several projects at the same time. However, this concern about resource constraints was not borne out by feedback from proposing organisation coordinators. Most of the 133 replies to the specific question in the public consultation were either very positive (32%) or moderately positive (35%) that the EU promotion policy was efficient in offering the scope for proposing organisations to submit several programmes under several topics when submitting applications to the European Commission. Only 4% of respondents gave a negative reply; 6% of respondents saw ‘no difference’ and 23% had no opinion.

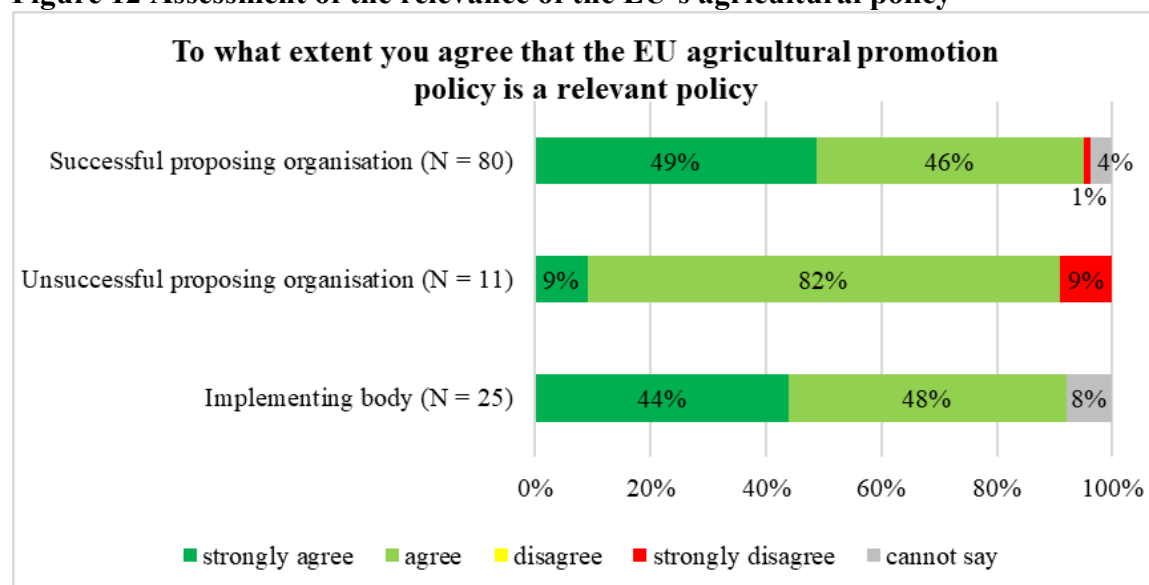
5.3 Relevance

The assessment of the relevance of the promotion policy analyses the extent to which the promotion policy’s general and specific objectives are in line with the most pressing needs and problems facing the EU agricultural sector today. The analysis is based on desk research complemented by data collected during interviews, online surveys, and case studies carried out in the support study.

5.3.1 Relevance of the general and specific objectives of the policy

Overall, the evidence collected from stakeholders indicates that the EU agricultural promotion policy’s general and specific objectives are relevant and positively addressing stakeholder needs as well as market challenges. In terms of stakeholders needs, the duration of funding is found to be linked to the ability to achieve meaningful change, although for certain products or markets, the possibility to run programmes for more than 36 months (which is the limit set by legislation) would seem adequate.

Figure 12 Assessment of the relevance of the EU’s agricultural policy



Source: support study (adaptation)

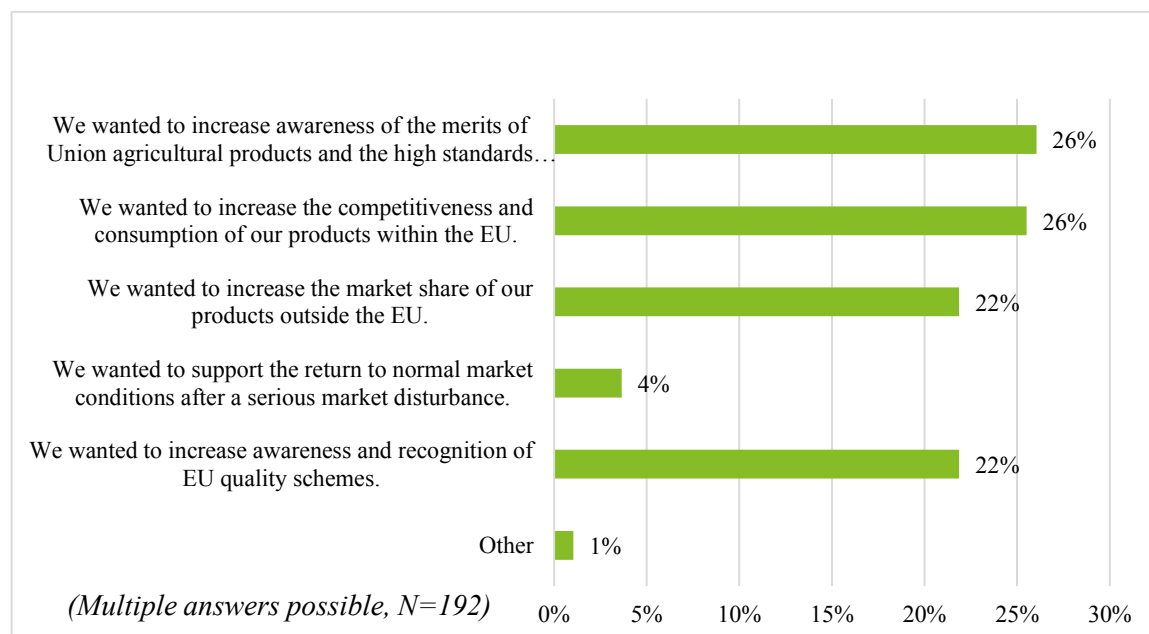
On the basis of replies on the most common reasons for applying to the promotion programmes, the most relevant policy objectives addressing stakeholder needs were to:

- increase awareness of the merits of EU agricultural products and the high standards of production methods (27%);
- increase the competitiveness and consumption of European agricultural products within the EU (27%);
- increase the market share of European agricultural products outside of the EU (23%).

The case studies⁵² indicate that the promotion policy is particularly relevant for promotion programmes targeting non-EU countries, as they increase awareness and improve consumer perceptions of the product quality. This is especially important for smaller producers entering a new, non-EU market or for organisations marketing products that are relatively new to the target market.

The promotion policy is also deemed to be highly relevant for products that received multiple rounds of funding in the past. Several years of promotion are linked to users increasing the association of the products with high quality and a better understanding of the origin of products and their production methods. However the assessment indicates a low level of flexibility in the promotion programmes' implementing measures with the objective of restoring market conditions after serious disturbances. That said, no measures were implemented in the reference period as no serious market condition was reported.

Figure 13 Main reasons for submitting a proposal (by proposing organisations)



Source: support study

The promotion policy proved relevant in light of recent market and policy developments such as the Russian import ban on EU products, African swine fever, US sanctions, etc.

⁵²<https://op.europa.eu/en/publication-detail/-/publication/d1d519ed-09d5-11eb-bc07-01aa75ed71a1/language-en>

which impacted EU trade of agricultural products, requiring policy intervention. Moreover, given the recent focus in the Green Deal and the farm to fork strategy on environmental and climate aspects, the policy could have a significant role in the transition towards a green and sustainable EU agricultural sector, provided that annual work programmes are tailored to the objectives of these initiatives.

The public consultation included a question on the relevance of the strategic targets in the EU promotion policy in terms of audience, products and regions. An overwhelming majority of the replies considered the targets either ‘very relevant’ or ‘moderately relevant’ in terms of audience (87% of 104 replies), products (85% of 115 replies) and regions (83% of 111 replies). In each case, only a small minority (3-7%), considered the targets irrelevant.

5.3.2 Relevance of the annual work programmes

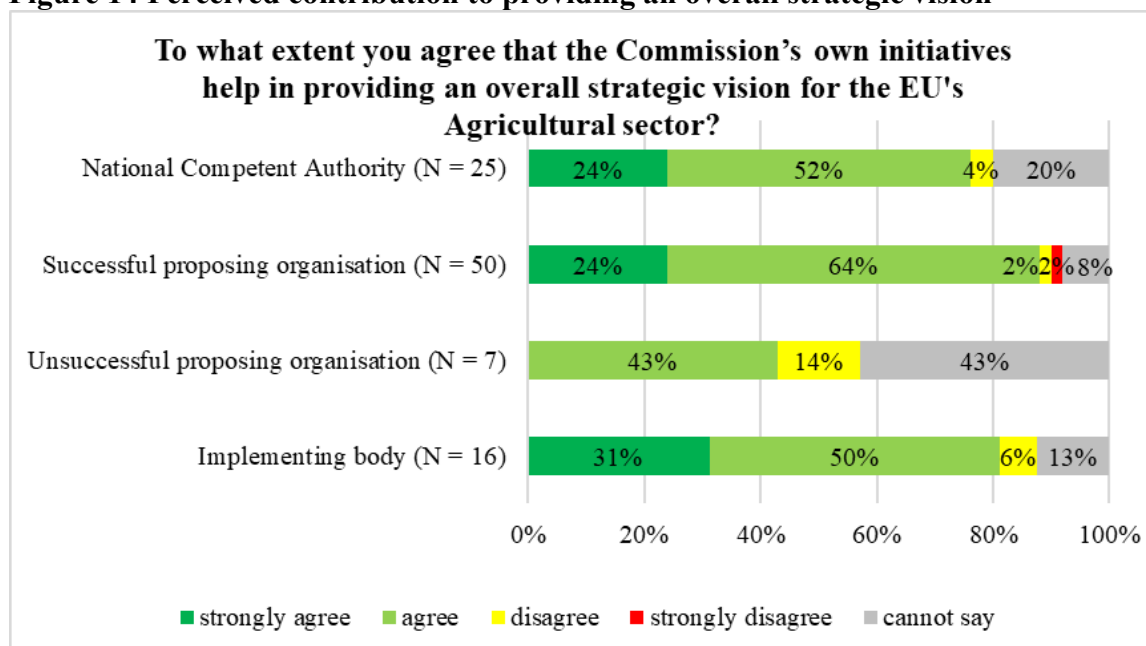
The evaluation indicated that annual work programmes provide clear strategic priorities that are both relevant to the promotion policy and aligned with evolving market conditions and policy objectives e.g. they point out which third countries are particularly targeted by the promotion programmes and align the promotion policy to some extent with EU environmental policies. Annual work programmes set the scene for programmes aimed to increase awareness of the high standards of EU goods, boost the consumption and competitiveness of these goods internally and outside of the EU and increase market share, especially in non-EU countries. Annual work programmes set out targets based on sound information and current market needs and challenges. Despite being relevant to the annual work programme strategic priorities, these objectives sometimes appear to be more similar to overarching aims than measurable goals, as objectives have no quantifiable thresholds to evaluate whether it achieved the intended result.

In sum, the evaluation found that annual work programmes appear to be for the most part relevant to the challenges and pressures faced in recent times by the European agricultural sector. Therefore the annual programmes can be considered generally relevant to the needs of the stakeholders. Some urgent and extraordinary problems of the latter were resolved adequately, for example in reacting to the economic impact of Russian sanctions, while other concerns related to environmental and climate change could be improved in the priorities of future annual work programmes.

5.3.3 Relevance of Commission own initiatives

Commission own initiatives seem to respond to current challenges and market needs. The in-depth interviews of the support study revealed that the most relevant aspects for stakeholders were technical support and information seminars, although it depends on the stakeholder groups. For example, national competent authorities appear to particularly appreciate high-level missions, regarding them as highly relevant to promote EU agricultural products in non-EU countries. Successful proposing organisations particularly valued technical support services for the information provided. Implementing bodies especially rated trade fairs and international exhibitions at EU pavilions, which they viewed as valuable fora to carry out their promotion measures.

Figure 14 Perceived contribution to providing an overall strategic vision

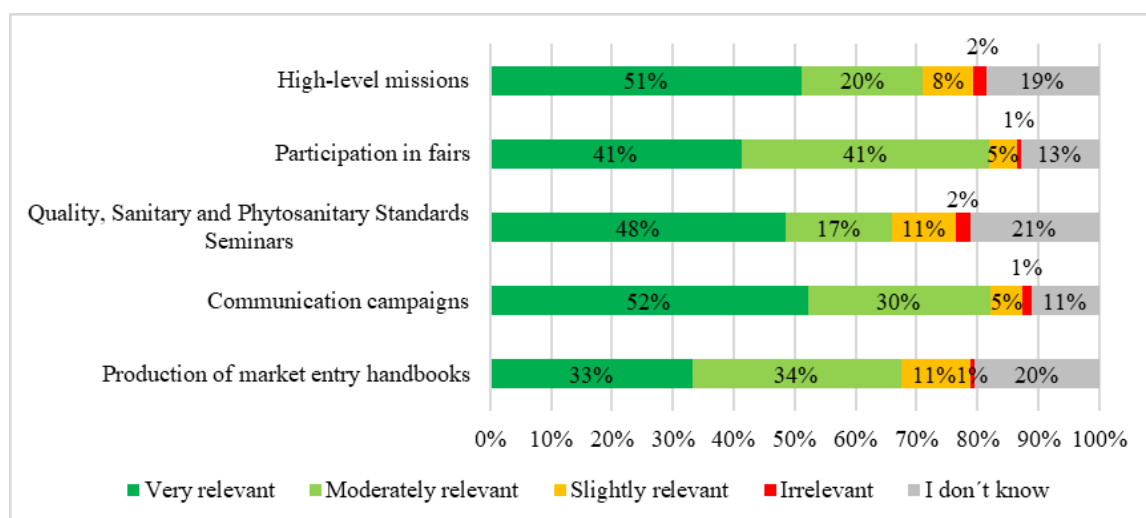


Source: support study (adaptation)

Overall, Commission own initiatives made a positive contribution to the general strategic vision for the EU's agricultural sector, though unsuccessful proposing organisations agreed less with this statement than other groups of respondents.

A clear majority of the respondents to the public consultation gave a positive assessment of the relevance of EU promotion measures, from participation in fairs (82% of 133 replies), communication campaigns (82% of 134 replies), high-level missions (71% of 135 replies), production of market entry handbooks (67% of 133 replies) and seminars (66% of 132 replies).

Figure 15 Relevance of EU measures below to help the EU promotion (in %)



Source: public consultation

5.3.4 Relevance of the signature 'Enjoy it's from Europe!'

The support study findings indicate that, overall, the signature 'Enjoy! It's from Europe' was relevant. This is backed up by the replies to the public consultation, to which

respondents gave an overall positive reply, with 25% (from 139 replies) considering the signature to be relevant 'to a large extent', 31% 'to a fairly good extent' and 24% 'to some extent only'. Only 7% replied 'not at all' and 13% had no opinion.

However, the support study also found that opinions on the relevance of the signature vary according to whether it is used in the EU market or in non-EU countries. Stakeholders tended to agree that the signature is more relevant in non-EU countries than in the internal market, particularly when the products are new to the market. On the one hand, the signature is gaining widespread recognition in non-EU countries, and consumers positively associate EU agricultural products with high quality, strict food safety and tradition. These perceptions are very important to achieve the key objectives of the promotion policy and therefore contribute to its relevance. The outreach and relevance of the signature would be even greater if the signature was translated into the target country's national language.

On the other hand, although stakeholders generally approve and encourage it, the signature seems to have limited relevance in the EU. This may be due to the fact that EU consumers are already familiar with the meaning of the signature and are interested in other aspects of EU agricultural products, such as their nutritional values and country of origin. There is an increasing amongst consumers to favour local products, whenever possible.

In addition, stakeholders believe the European dimension is too prominent in internal market promotion material and would like more visibility given to the country or region of origin, and to product branding.

5.4 Coherence

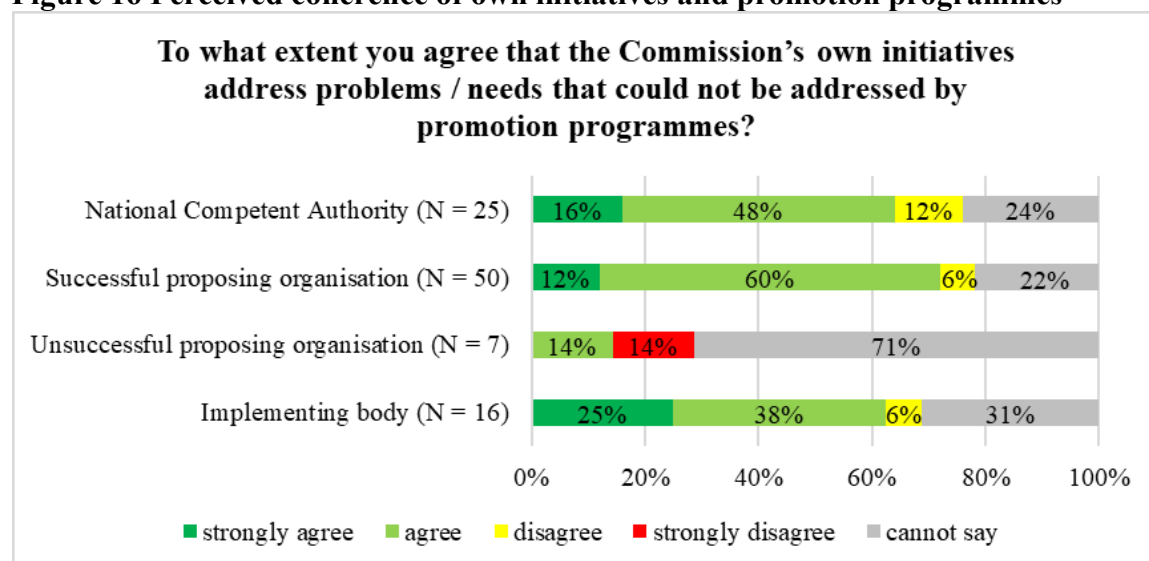
The evaluation question assessing the coherence of the promotion policy analyses the extent to which the different components of the policy (EU own initiatives and promotion programmes) combine to achieve the policy objectives (internal coherence), and explores the complementarity, synergies and potential tensions between the promotion policy and other EU policies, as well as action in the same policy field at national and at EU level (external coherence). The assessment draws on data available from document reviews, interviews, online surveys and case studies.

5.4.1 Coherence between Commission own initiatives and promotion programmes

Based on the findings of the in-depth interviews and online surveys, it can be concluded that the Commission's own initiatives and the promotion programmes are coherent to a large extent because they follow the same objectives and complement each other. The stakeholders consulted agree that the Commission's own initiatives are able to tackle more strategic issues that promotion programmes cannot address, such as issues relating to regulations and legal frameworks. In this way, they ease market access for proposing organisations and they complement promotion activities. In addition, stakeholders believe that the high visibility of the Commission's own initiatives due to their political nature contribute to increasing the overall impact of the promotion campaigns.

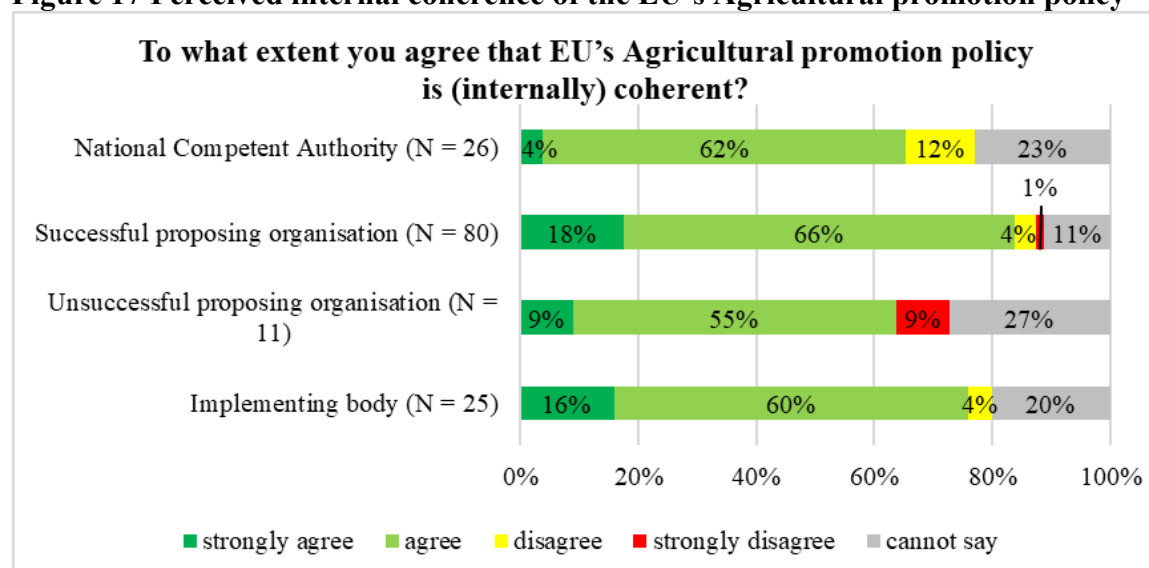
Cross checking the findings of document reviews and stakeholder opinions with the case studies indicated that the promotion programmes are also highly coherent in terms of objectives and activities. Stakeholders see positive spill-over effects and expect synergies in the implementation of different promotion programmes, although they do not always fully materialise due to independent implementation and a lack of interaction across promotion programmes. Limited coordination also appears to constrain the full additional value that the Commission's own initiatives could create for promotion programmes.

Figure 16 Perceived coherence of own initiatives and promotion programmes



Source: support study (adaptation)

Figure 17 Perceived internal coherence of the EU's Agricultural promotion policy



Source: support study (adaptation)

The outcome of the public consultation backs up these findings, with most respondents (58% of 134 replies) indicating either very clear (17%) or moderate (41%) levels of coherence between the measures endorsed by the European Commission and the promotion programmes submitted by proposing organisations. An additional 10% indicated a 'slight' coherence, 11% found no coherence at all and 21% had no opinion.

The stakeholders consulted in the support study agreed that the Commission's own initiatives are able to tackle more strategic issues that promotion programmes cannot address, such as issues relating to regulations and legal frameworks. Therefore Commission's own initiatives and the promotion programmes are complementary and there is internal coherence of the promotion policy. For example, high-level missions can pave the way for successful programmes in non-EU countries.

Both aspects of the promotion policy pursue the same objective but Commission own initiatives can reach different audiences than the programmes and it is necessary to target

a wide spectrum of markets to increase awareness and sales. In this way, they ease market access for proposing organisations and complement promotion activities.

In addition, stakeholders believe that the high visibility of the Commission's own initiatives due to their political nature contribute to increasing the overall impact of the promotion campaigns.

Once a trade fair attracts the attention of key market players in a non-EU country, promotion programmes can build on that interest and will be more successful as the evaluation found that repeating the message in different ways is key to success. The same applies to high-level missions.

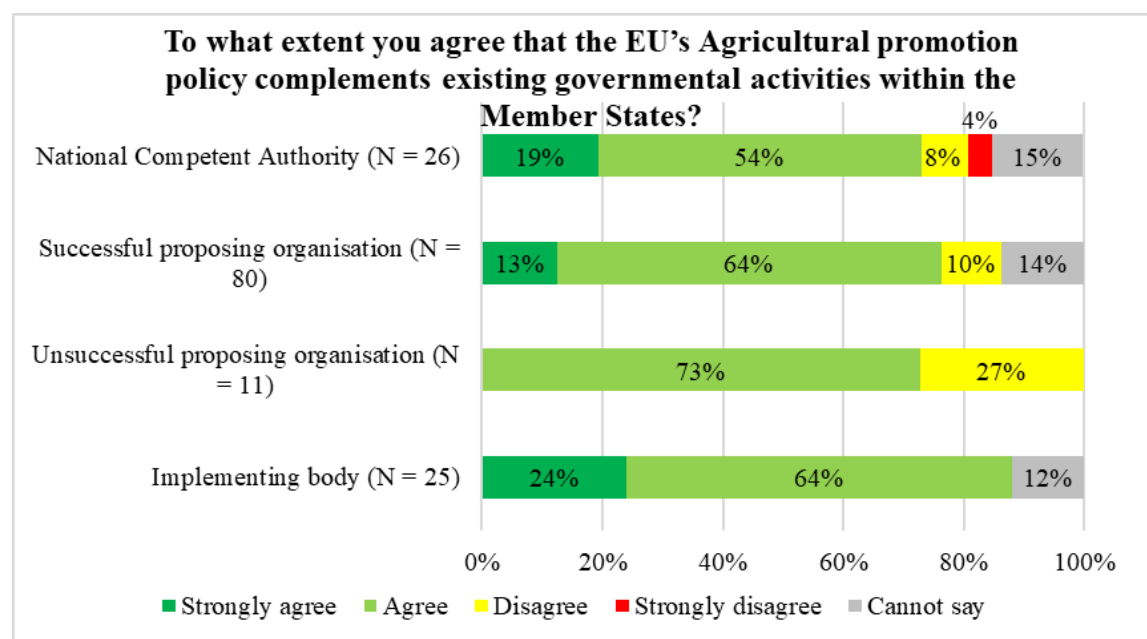
Once an export contract is signed and exports begin, it is easier to create awareness of certain EU agricultural products.

Cross checking the document review findings and stakeholders' opinions with the case studies indicates that the promotion programmes are also highly coherent in terms of objectives and activities. Stakeholders see positive spill-over effects and expect synergies in implementing different promotion programmes, although they do not always fully materialise due to independent implementation and a lack of interaction across different promotion programmes. Limited coordination also appears to constrain the full additional value that the Commission's own initiatives could create for promotion programmes.

5.4.2 Coherence with measures implemented by Member States or private initiatives

The evidence indicates that the level of coherence of the EU promotion policy and public and private initiatives at national level is generally high. But it varies depending to a large extent on the national context since the availability of funding at national level differs across Member States.

Figure 18 Perceived complementarity with governmental activities at national level



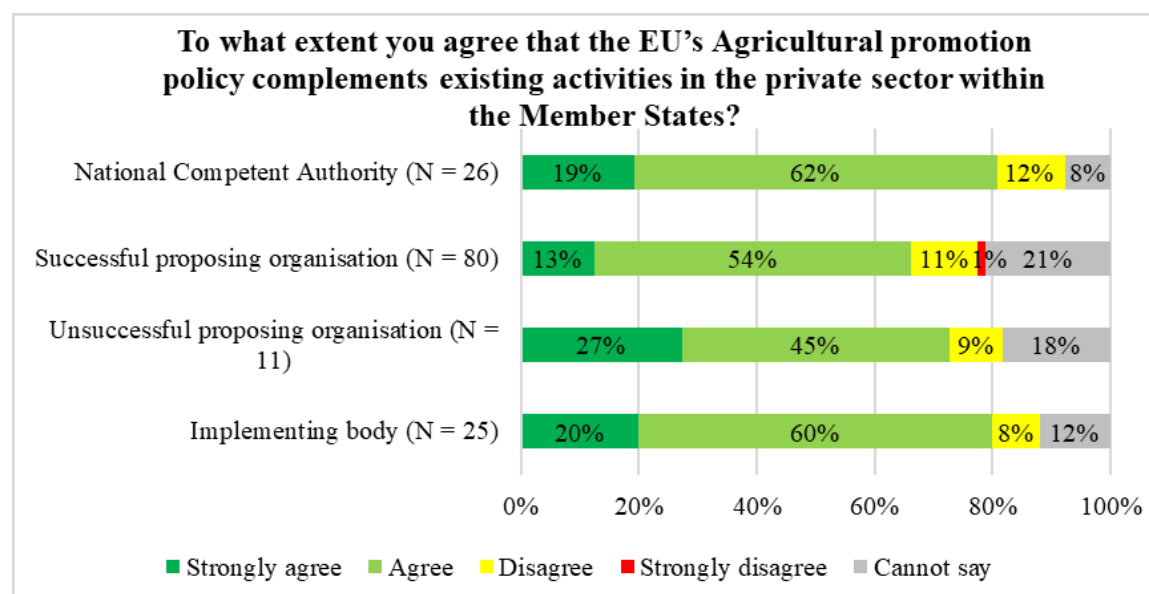
Source: support study (adaptation)

The assessment that the EU promotion policy measures are coherent with public initiatives at national level is based on cross checks of stakeholder opinions with desk research of initiatives in certain Member States, though it does not include a comprehensive overview of all initiatives at national level. Stakeholders perceive national promotion initiatives that also focus on the promotion of quality products as complementary because they enhance the outreach of promotion activities and fill gaps at national level. Furthermore, the analysis did not find any areas of tension impeding the implementation of the EU agricultural promotion policy.

To conclude, the nature of interaction between EU and national public promotion measures may vary across national contexts, but the evidence suggests that the different measures are coherent. According to the stakeholders interviewed, the national context differs across Member States in terms of existing measures at national level. Examples of different situations in specific Member States from the case studies confirm this observation. In some Member States, a number of government-to-government activities are carried out with the goal of promoting trade. Within this framework, agricultural products can also be promoted (e.g. in Germany). In other Member States, there are dedicated funds available to promote agricultural products (e.g. in Belgium)⁵³. In a third group of Member States, there is either no funding for such activities (e.g. in Greece)⁵⁴ or the available budget is adapted in line with the availability of EU support to avoid overlap (e.g. in France)⁵⁵.

For private initiatives at national level, the findings of the case studies based on examples of two such initiatives indicate that they pursue the same objective as the EU agricultural promotion policy since they also promote EU quality schemes and so benefit from enhanced outreach.

Figure 19 Perceived complementarity with private-sector action at national level



Source: support study (adaptation)

⁵³ Annex 2 of the evaluation support study Case study on Dairy products in China.

⁵⁴ Annex 2 of the evaluation support study Case study on Fruit and Vegetables UAE.

⁵⁵ Annex 2 of the evaluation support study Case study on Fruit and Vegetables UAE.

Although there may be some tension in implementation due to promoting locally established quality labels in parallel with EU quality schemes in certain regions, the EU promotion programmes complement and enhance the outreach of private initiatives.

Overall, the public consultation generated a favourable opinion regarding coherence between the EU agricultural and food promotion policy and promotion measures implemented by the Member States or under private initiatives: 6% (of 136 replies) replied ‘fully coherent’ and 52% ‘generally coherent’, while 23% of the respondents rated it as limited coherence (‘to a small extent’), 3% gave a negative view (‘incoherent’) and 16% had no opinion.

5.4.3 Coherence with other EU policies

Coherence with other EU agricultural policies

The evidence from desk research, interviews and case studies shows that the EU agricultural promotion policy and sector-specific support for the wine sector, defined in Regulation (EU) No 1308/2013⁵⁶, are coherent to a certain degree, since their objectives are consistent, the measures do not overlap in implementation and are likely to enhance each other’s impact. However, the lack of consistency between some specific procedural aspects slightly reduces the level of coherence (e.g. private companies can be beneficiaries under the sector-specific support targeting the external market, measures on the internal market do not have to be part of a broad approach under the sector-specific support and the co-financing rates differ). There is no evidence that these inconsistencies lead to tension in implementing the policies. For example, stakeholders consulted in the case study on the promotion of wine, beer, spirits and vinegar in the USA found market-related support available under the CAP first pillar coherent with the promotion policy.

The EU agricultural promotion policy is also coherent to a large extent with sector-specific support measures focusing on the fruit and vegetables sector. The policies are consistent in objectives, complementary, and with no risk of overlap in implementation. In terms of the measures implemented, activities in schools are also eligible under the EU agricultural promotion policy,⁵⁷ thus complementing the educational measures and communication activities funded under the school fruit, vegetables and milk scheme.

Only 5% of the scheme’s budget was spent on these activities in the 2017/2018 school year. The remainder was used to supply and distribute school fruit, vegetables and milk.⁵⁸ A previous evaluation of the European school milk and European school fruit schemes

⁵⁶ As part of the sector-specific support measures planned for the wine sector, Article 45 of Regulation (EU) No 1308/2013 sets out the scope and conditions for carrying out promotion activities. On the internal market, they focus on promoting EU quality schemes and campaigns concerning responsible consumption and alerting the public to the damages caused by excessive wine consumption. On the external market, the promotion activities aim to increase market access. The CAP measures applicable to the wine sector were subject to a recent evaluation, published in 2019.

⁵⁷ Defined in Section 6.2. Eligible activities in the call for proposals.

⁵⁸ European Commission, ‘Monitoring report, The EU school fruit, vegetables and milk scheme’, https://ec.europa.eu/info/sites/info/files/food-farming-fisheries/key_policies/documents/school-scheme-summary-report_en.pdf.

also found there is complementarity between the measures and CAP objectives, including EU information policies.⁵⁹

The EU agricultural promotion policy is coherent to a large degree with measures under rural development programmes, notably those that support the development of quality and organic products, and information and promotion measures that can be implemented by groups of producers in the internal market for products covered by a quality scheme. Their objectives are consistent, although the target groups is different, which ensures that the measures implemented are complementary.

Overall, the EU agricultural promotion policy is largely consistent with the objectives and procedural aspects of broader agricultural policies that aim to increase the consumption of agri-food products.

Respondents to the public consultation gave mostly favourable views regarding the coherence of the EU agricultural promotion policy with other CAP policies promoting products. However, the majority reported a lack of knowledge on coherence (53% of 136 replies for wine, 27% of 134 replies for rural development and 40% of 133 replies for fruit and vegetables replied 'I don't know').

In terms of coherence with other CAP support for promotion measures, most replies were positive, with at least a general level of coherence with the promotion of rural development quality labels (49% of replies), operational programmes to promote fruit and vegetables (35%) and promotion measures for the wine sector (35%).

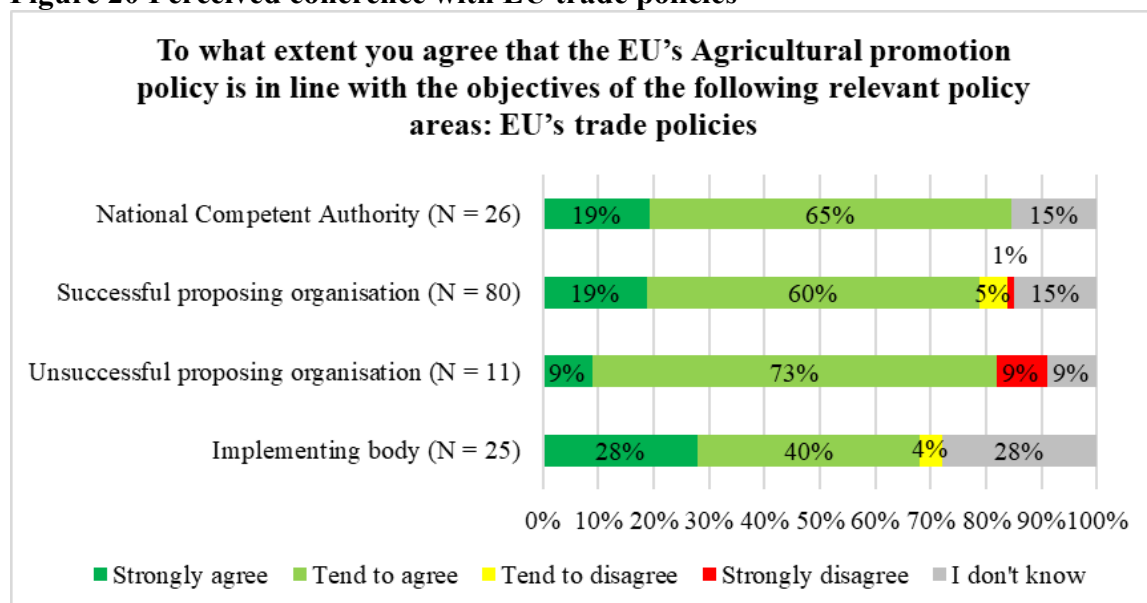
Coherence with EU trade policies

The support study found that the objectives and design of the EU agricultural promotion policy are coherent to a large extent with trade policies targeting non-EU markets. The two policies are complementary since the aim of EU trade policy is to ensure market access and the aim of the agricultural promotion policy is to help proposing organisations enter those markets. The design of the EU agricultural policy, along with annual work programmes that factor in trade policy developments and a number of coordination mechanisms, ensures consistency with the external target markets defined in the EU agricultural promotion policy, which results in complementarity.

The replies to the public consultation were positive in terms of the coherence between the EU's agricultural promotion policy and EU trade policy. 19% of 138 replies indicated 'full coherence' and 36% 'coherence'. 21% replied 'slightly coherent' and 17% replied no coherence, with 12% stating no opinion.

⁵⁹ AFC Consulting Group AG, DG AGRI, Evaluation of the European School Fruit Programme, 2012, Executive summary, <https://op.europa.eu/en/publication-detail/-/publication/2d3329d8-7cd0-46b1-b8e0-ddd941c711cb/language-en/format-PDF/source-search>.
AFC Consulting Group AG, DG AGRI, Evaluation of the European School Milk Programme, 2014, Executive summary, <https://op.europa.eu/en/publication-detail/-/publication/591f5107-9264-4bf5-bd94-7f2788e6074c>.

Figure 20 Perceived coherence with EU trade policies



Source: support study (adaptation)

The level of coherence between the two policies also depends on the extent to which the products promoted correspond to products with the highest growth potential in terms of sales and market shares.

Proposing organisations participating in the case study on promotion of spirits, alcoholic beverages, wine and vinegar in the US highlighted that the EU agricultural promotion policy is also coherent with the focus of EU trade policy on supporting small and medium sized enterprises and rural producers. They suggested that the policy is coherent externally by focusing on the right markets, and internally by supporting target groups identified as relevant by EU trade policy. The case studies focusing on other product sectors also confirmed that the EU agricultural promotion policy is consistent with EU trade policies that aim to strengthen the resilience of agricultural sectors (e.g. dairy).

Although the stakeholders consulted in in-depth interviews agreed that the focus of the promotion policy on EU quality schemes is consistent with broader EU trade policies (as these products are the ones with the highest growth potential), some stakeholders, in particular proposing organisations, voiced the opposite view in the case studies. Specifically, the market for labels is overcrowded and any promotional activity would need to spend more in order to generate the same level of recognition than would otherwise be generated with fewer funds in a less crowded market. Since the focus of the case study that raised this point was on the internal market, this divergence of opinion could be due to different growth potential of EU quality scheme products on the internal and external market. In general, the partners interviewed also highlighted that putting a stronger focus on the external market would be more beneficial since the external market is larger and has a higher growth potential.

Overall, the assessment did not identify any areas of tension between the EU agricultural and trade policies. However, although there is a high level of coherence in terms of the external market targeted, there is coherence on the internal market.

Coherence with EU maritime and fishery policies

The desk research and evidence collected during the support study shows that the EU agricultural promotion policy is consistent with the objectives and procedural elements of EU maritime and fishery policies. There have been a number of promotion campaigns

implemented at EU level on fisheries and aquaculture in recent years. These include the Inseparable campaign⁶⁰, #FARMEDintheEU in support of aquaculture, and #TasteTheOcean to be launched in 2021. The EU agricultural promotion policy provides a useful support for promotion activities in the fisheries, aquaculture and processing sectors. As a result, there is high level of coherence between the EU agricultural promotion policy and EU maritime and fishery policies.

Coherence with EU health policies

EU countries hold primary responsibility for health policy. EU health policy therefore serves to complement national policies, and to ensure health protection in all EU policies. The objectives of the EU health policy are to protect and improve the health of EU citizens, support Member States in prevention diseases and promote health in all Union policies and activities⁶¹. Desk research carried out on the broader policy framework and the in-depth interviews at EU level identified two areas of particular importance regarding the promotion of agricultural products: alcohol consumption and healthy dietary practices.

EU agricultural promotion measures for beer, wines and spirits on the internal market are limited to providing information on the responsible consumption of alcohol and/or to the promotion of products under EU quality schemes. In addition, wine can only be promoted on the internal market in combination with other products.

Nevertheless the external evaluation study identified experts who expressed the view that any amount of alcohol consumption is harmful, implying that any EU agricultural promotion activities linked to beer, wine or spirits could be seen as contrary to EU health objectives.

However, there is no evidence that the implementation of information measures on the responsible consumption of eligible beer, wines and spirits is inconsistent with the specific objective under the Third Health Programme⁶² to reduce harmful alcohol consumption. The extent of coherence depends on the consistent application of the definition of ‘responsible alcohol consumption’, which is defined at Member State level. Since proposals for action under the promotion programmes must be aligned with policies at national level in this regard, there is no evidence suggesting incoherence between the EU agricultural promotion policy and EU health policies in the reference period for this evaluation.

⁶⁰ <https://op.europa.eu/en/publication-detail/-/publication/ffe89bd9-0f0b-46b4-a3c5-d01e63362c74>

⁶¹ Based on TFEU, Article 168, according to which a high level of human health protection shall be ensured in the definition and implementation of all Union policies and activities. Union action, which shall complement national policies, shall be directed towards improving public health, preventing physical and mental illness and diseases, and obviating sources of danger to physical and mental health. Such action shall cover the fight against the major health scourges, by promoting research into their causes, their transmission and their prevention, as well as health information and education, and monitoring, early warning of and combating serious cross-border threats to health.

⁶² Third Health Programme (Regulation (EU) No 282/2014 of the European Parliament and of the Council of 11 March 2014 on the establishment of a third Programme for the Union's action in the field of health (2014-2020) and repealing Decision No 1350/2007/EC).
https://ec.europa.eu/health/funding/programme/2014-2020_en

Since the 2018 annual work programme the promotion policy recognises the need to promote healthy dietary practices within their thematic priorities, and have budget allocated to multi programmes targeting the internal market to highlight the ‘nutritional and health aspects (including proper dietary practices and responsible consumption of eligible alcoholic beverages)’⁶³. Support under the EU promotion policy for the fruit and vegetable sector is also recognised as instrumental in achieving the measures set out in the Tartu Call for healthy lifestyles⁶⁴.

The support study shows positive stakeholder feedback on the focus on promoting fruit and vegetables, especially given the data showing that fruit and vegetable intake amongst the EU population is insufficient.⁶⁵ However, analysis from 2017 by the European Environment Agency estimated that the average protein⁶⁶ intake of the EU population is substantially above the minimum required for a healthy diet, which would imply the need to reduce meat consumption from a health perspective.⁶⁷ In this particular case, the evidence suggests that the level of coherence between the two policies depends on the extent to which the budget allocated to promoting specific products corresponds to trends in under- and overconsumption or to scientific evidence regarding their nutritional value and their impact on human health. In the example given, scientific evidence suggesting the need to increase the consumption of fruit and vegetables should result in a higher budget being allocated to promoting these products.

Overall, most respondents across all respondent groups from the online survey strongly agreed or agreed that the EU agricultural promotion and health policies are aligned.

The replies to the public consultation gave a positive view on the coherence between the EU agricultural promotion policy and the EU health policy, but also indicated the above lack of consensus, with 18% of 141 replies indicating ‘full coherence’ and 35% ‘coherence’. 13% replied ‘slightly coherent’ and a relatively significant 24% consider the policies to be incoherent⁶⁸, while 10% had no opinion.

⁶³ Annual work programme 2019.

⁶⁴ European Commission, ‘The Tartu Call for a healthy lifestyle – where are we two years later?’

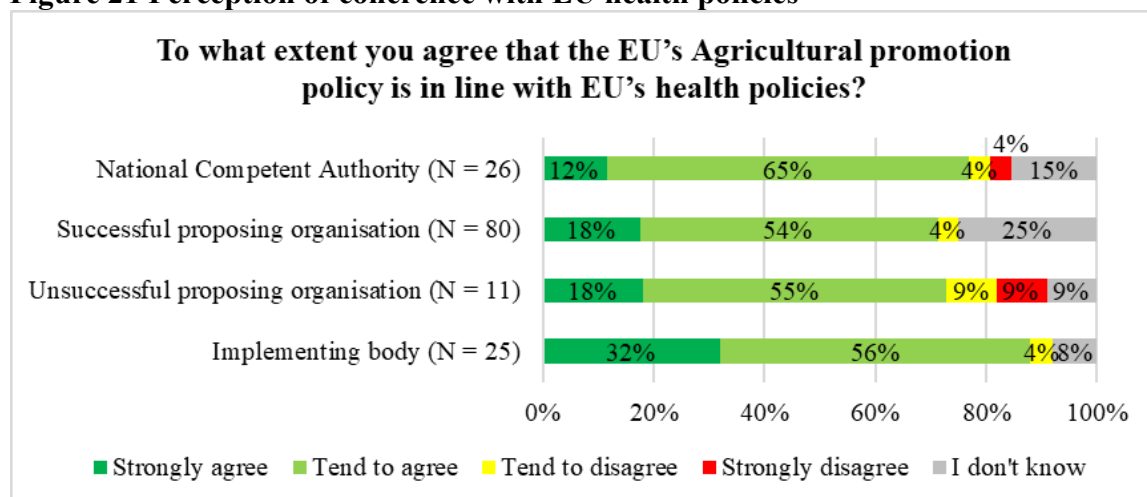
⁶⁵ Only 14.1% of EU adults consume five portions (equivalent to 400g) of fruit and vegetables per day, as recommended by most food-based dietary guidelines, according to the EU science hub based on analysis of the European Food Safety Authority (EFSA) Comprehensive Food Consumption database (EFSA database). <https://ec.europa.eu/jrc/en/health-knowledge-gateway/promotion-prevention/nutrition/fruit-vegetables>.

⁶⁶ Meat and dairy are the main sources of protein in a diet.

⁶⁷ European Environment Agency, Food consumption — animal-based protein, 6 December 2017. Available at <https://www.eea.europa.eu/data-and-maps/indicators/13.2-development-in-consumption-of-2/assessment-1>.

⁶⁸ A total of 34 (out of 141) replies, of which 18 were NGOs. Although the consultation did not yield exact reasons for the perceived incoherence, the replies to open questions and complementary contributions to the consultation imply that the policy promotes unhealthy food products. There is no factual basis to support such claims, which seem to be founded on a lack of understanding of the objectives of the policy and the intentions of promotion measures, leading to these views.

Figure 21 Perception of coherence with EU health policies



Source: support study (adaptation)

The support study finds that the EU agricultural promotion policy is coherent to a large extent with EU health policies as it found no inconsistencies in its objectives and implementation. However, the extent of coherence depends on the type of measure (promotion programmes and Commission own initiatives) and on the product promoted. The EU agricultural promotion policy appears to have a high level of coherence with EU health policies in terms of the link to increasing food safety and promoting balanced nutrition.

The analysis shows that the Commission's own initiatives are complementary with activities under the Better Training for Safer Food⁶⁹ programme and that programmes focusing on fruit and vegetables are in line with the objective to increase their consumption.

Coherence with EU environment and climate change policies

The Europe 2020 strategy for smart, sustainable and inclusive growth sets the target to reduce greenhouse gas emissions by 20% compared to 1990, and the Europe 2030 strategy increases the target to reduce greenhouse gas emissions by 40% by 2030.⁷⁰ The European Green Deal aims to achieve climate neutrality by 2050⁷¹.

The analysis of the annual work programmes shows that the EU agricultural promotion policy integrated the aspect of sustainability in its planning, but at the same time also has a specific but very limited budget allocated to livestock sectors, which are deemed to be accountable for a large share of the CO₂ emissions in agriculture. This somewhat limits coherence with the EU's commitment to reducing greenhouse gas emissions and to achieving its broader environmental goals. Animal production in the agri-food sector has

⁶⁹ Better Training for Safer Food (BTSF) is a Commission training initiative covering food and feed law, animal health and welfare, plant health rules and rules on plant protection products based on Article 130 of [Regulation \(EU\) 2017/625](#).

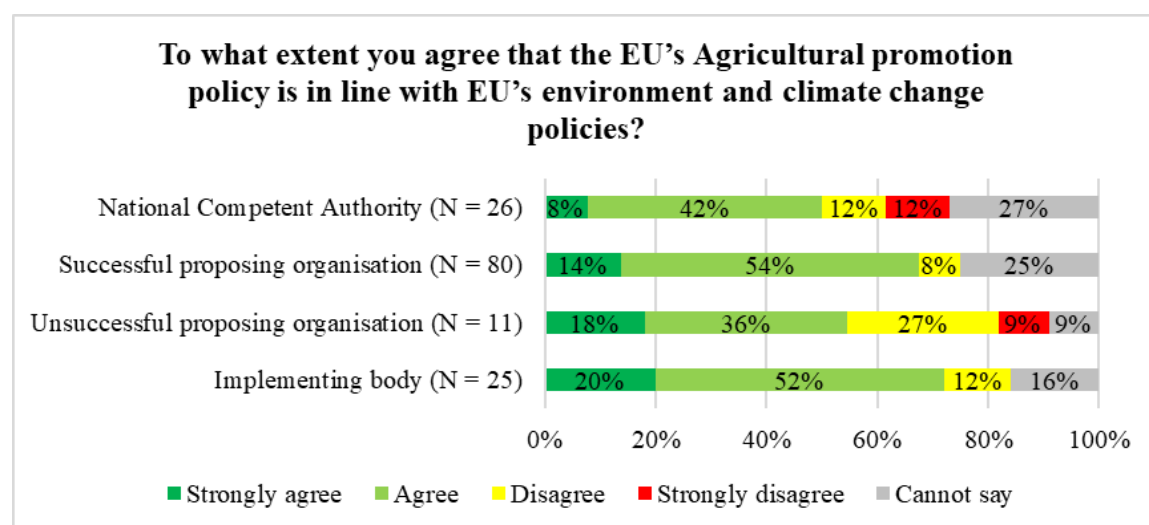
⁷⁰ In addition, The Communications 'Clean planet for all' and 'The European Green Deal' go a step further by setting an aim of achieving net-zero greenhouse gas emissions in the EU by 2050. See COM/2018/773 final, Clean Planet for all - A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy.

⁷¹ https://ec.europa.eu/commission/presscorner/detail/en/IP_19_6691

a high ecological footprint in terms of greenhouse gas emissions.⁷² Reducing the production and consumption of meat and dairy products can therefore help to reduce greenhouse gas emissions and have a positive impact on health and environment. The Commission stated that Europeans making ‘moderate changes in food consumption patterns’ to eat less meat ‘could reduce significantly emissions from agriculture production’.⁷³

Most respondents to the online survey who provided an answer strongly agreed or agreed that the EU’s agricultural promotion policy is in line with EU’s environmental and climate change policies. There was some disagreement, depending on the respondent groups: 40% of unsuccessful proposing organisations strongly disagreed or disagreed, against only 17% for implementing bodies, 22% for national competent authorities and 7% for successful proposing organisations.

Figure 22 Perceived coherence with EU environment and climate change policies



Source: support study (adaptation)

There were mixed replies to the public consultation regarding coherence between the EU agricultural promotion policy and EU environment and climate action policies. Regarding environment, 12% (of 140 respondents) replied that they were ‘fully coherent’, 34% ‘coherent’, but 21% ‘incoherent’ (with 13% ‘don’t know’). On climate action, 11% replied ‘fully coherent’, 32% ‘coherent’, but 24% ‘incoherent’ (with 15% ‘don’t know’).

Overall, the design of the EU agricultural promotion policy recognises the priorities of EU policies on climate change and environment, especially by highlighting the importance of sustainable production methods. However, as the policy’s focus is on enhancing competitiveness of EU agrifood sectors, it is not designed a priori to support

⁷² Most emissions of non-CO₂ greenhouse gases (i.e. methane and nitrous oxide) in agriculture originate directly or indirectly from animal production. This sector will be directly responsible for 72% of those emissions in 2030, assuming emissions from manure on the field are allocated to the livestock sector. EU agricultural outlook: European emissions linked to agriculture set to decrease by 2030.

⁷³ European Commission, In-depth analysis underpinning Commission Communication COM/2018/773. November 2018.
https://ec.europa.eu/clima/sites/clima/files/docs/pages/com_2018_733_analysis_in_support_en_0.pdf.

environmental and climate objectives, which means that negative impacts on climate and the environment can occur as it covers sectors that are responsible for a large share of greenhouse gas emissions (e.g. meat and dairy). Promotion of exports to non-EU countries that require longer transportation, could be more CO₂ intensive overall, depending on their production methods. Given that the environmental and climate impact of the promotion programmes depends on a range of factors such as product type, production methods and transport mode, it is impossible to quantify the effect of promotion campaigns on climate change and environment without conducting a case by case analysis based on a commonly accepted framework.

Coherence with EU development policies

There has been much analysis of the coherence of the common agricultural policy with EU development policies,⁷⁴ with the observation that the shift towards a more market-focused approach has minimised potential distortions in global agricultural markets. The measures implemented under the EU agricultural promotion policy are not based on direct price or market support measures (e.g. subsidies, market restrictions, etc.), which are perceived as having trade- and/or market-distorting effects. They classify as ‘green box’ (permitted) measures under the World Trade Organisation’s categorisation of domestic support in agriculture⁷⁵. However, the European non-government organisation confederation for relief and development (CONCORD) highlighted in a note from 2018 the conflict between EU ‘support of an export-focused model of production and local markets in developing countries which have the potential to increase production in response to domestic food needs.’⁷⁶ Nevertheless, the impact of EU agricultural promotion programmes on developing countries is likely to differ, depending on factors such as market segments, level of development of the target country, local production conditions and prices.

Stakeholders highlighted that increasing the market share of specific, sensitive products (e.g. milk powder, chicken parts and tomato paste) can have distorting effects on markets in developing regions (e.g. Sub-Saharan Africa). Examples include unfair competition driving small-scale local food producers out of business or reducing their profit margins, negatively affecting local livelihoods and hindering processes of women empowerment. For example, the Oxfam Case Study on the dairy sector in West Africa mentions that local producers struggle to gain access to the more formalised market and to develop the local dairy sector due to ‘inequalities and lack of investment, infrastructure and interest from businesses’ and cheap imports of milk powder from Europe.⁷⁷ However, only 3% of promotion programmes target Africa, corresponding to four promotion programmes, only

⁷⁴ Recent reports include European Parliament, DG for External Policies, ‘The Impact of the Common Agricultural Policy on Developing Countries’, 2018 or European Commission, SWD (2019) 20 final, ‘2019 EU report on Policy Coherence for Development’.

⁷⁵ See Annex 2 to the Agreement on Agriculture, more specifically ‘marketing and promotion services, including market information, advice and promotion relating to particular products but excluding expenditure for unspecified purposes that could be used by sellers to reduce their selling price or confer a direct economic benefit to purchasers’.

⁷⁶ CONCORD recommendations on CAP and PCD, 2018. https://concordeurope.org/wp-content/uploads/2018/11/CONCORD_Recommendations_CAP_PCSD_Nov2018.pdf.

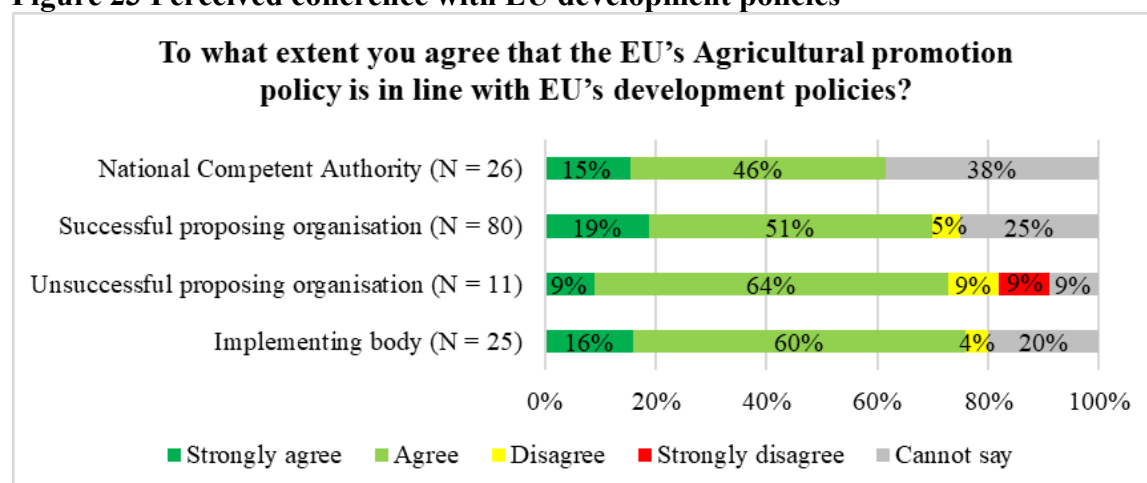
⁷⁷ Oxfam, ‘Taking a fresh approach: enabling local producers to meet rising demand in West Africa’s dairy sector’, June 2018.

two of which were to promote dairy products in Africa. The other concerned beer and meat. The annual work programmes for 2016⁷⁸ and 2017⁷⁹ also identified African countries as countries with a high-growth potential to be targeted by promotion programmes.

Most respondents to the online survey carried out as part of the support study perceived EU agricultural promotion and development policies as coherent, although a relatively high share of respondents also ‘cannot answer’ this question (38% of national competent authorities). This may be linked to the fact that only a very small share of programmes target developing countries, so the respondents may not have been aware of the potential impact.

The public consultation also produced mixed replies on the coherence between the EU agricultural promotion policy and EU development policy, with 12% of 140 replies indicating ‘full coherence’ and 29% ‘coherence’. 21% replied ‘slightly coherent’ and 19% considered the policies to be incoherent, while 19% had no opinion.

Figure 23 Perceived coherence with EU development policies



Source: support study (adaptation)

Overall, the assessment did not find any tension between EU development policy and EU agricultural promotion policy targeting mainly developed, non-EU markets.

In addition, it cannot be concluded that these four promotion programmes contradict the sustainable development goal to eradicate poverty or that they have a negative impact on the development of the local markets by driving local producers out of business and by having an impact on prices. The lack of empirical evidence and the need for a case-by-case simulation of each measure makes it impossible to identify exact impact and causalities, which depend on the specific product and national context.

⁷⁸ See the 2016 Annual Work Programme, Topic 8 - Information and promotion programmes targeting one or more countries of Africa or Middle East with a budget of EUR 4,690,000.

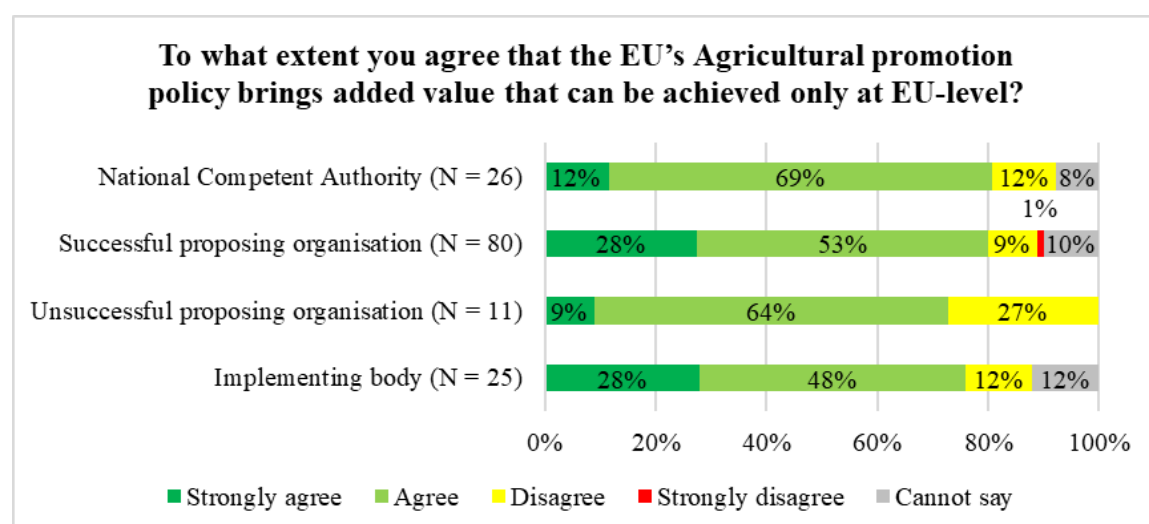
⁷⁹ See the 2017 Annual Work Programme, Topic 5 - Information provision and promotion programmes targeting one or more countries of Africa, Middle East, Iran or Turkey with a budget of EUR 8,450,000.

5.5. EU added value

The assessment of EU added value of the promotion policy analysed the extent to which stakeholders perceived EU added value from the promotion policy (both in the EU and in non-EU countries). It also analysed the extent to which EU promotion policy remains justified, based on an analysis of the effectiveness, efficiency, relevance and coherence and the principle of subsidiarity and proportionality.

Based on the results of different data collection methods and the analysis of the other evaluation criteria, it appears that there is high level of agreement that the EU promotion policy has added value that can be achieved only at EU level. This was highlighted by almost all participants of the in-depth interviews with representatives from seven Commission Directorates-General.⁸⁰ It was also backed up by the results of the online survey that captured the opinion of a broader set stakeholders. As shown in Figure 24, 81% of all national authorities and successful proposing organisations strongly agreed or agreed with this statement.

Figure 24 Assessment of the added value of the EU's agricultural promotion policy



Source: support study (adaptation)

In non-EU markets in particular, it is clear that EU programmes and EU trade fairs and high-level missions, through their EU-level coordination, are far more effective and efficient than running separate national programmes with the risk of fragmentation. This was highlighted by almost all participants in the in-depth interviews with representatives from seven Directorates-General⁸¹ and confirmed by the results of the online survey that captured the opinion of a broader set of stakeholders.

Nevertheless, the nature of EU added value of the promotion policy perceived by stakeholders differ, especially in relation to EU and non-EU markets. On the EU market, promotion policy beneficiaries seek to underline the quality of certain products, while on non-EU markets their aim is to increase sales and market share.

⁸⁰ The policy areas covered include agriculture, maritime and fishery policies, internal market and trade policies, communication, health and food safety, climate action.

⁸¹ The policy areas covered include agriculture, maritime and fishery policies, internal market and trade policies, communication, health and food safety, climate action.

The consulted stakeholders reported that EU promotion programmes are better able to boost the position of EU products on non-EU markets, because they achieve higher visibility due to cooperation between multiple stakeholders and therefore made it possible to run larger-scale programmes. This should be particularly the case for multi-programmes, which have a higher budget and are implemented by multiple organisations from across the EU. This argument is backed up by the effectiveness analysis, which concluded that the EU agricultural promotion policy contributes to increased awareness.

The respondents of the public consultation were also convinced that the EU promotion policy creates added value.

- A clear majority of respondents (79% of 138 replies) found that the EU agricultural and food promotion policy is better able to achieve the objectives to improve competitiveness of the agricultural sector than national/regional level policy, either 'far better' (32%), or 'better' (47%). Only 9% of respondents reported 'less able' to achieve the objectives, 4% reported 'no difference' and 7% had no opinion.
- An overwhelming majority of respondents found that the EU agricultural and food promotion policy measures contributed to spreading an EU-wide message, both in the EU and in non-EU countries, either strongly (53% of 136 replies), or moderately (35%). 1% of respondents replied that there is no contribution, 2% considered that the contribution is negative, and 9% had no opinion.
- In addition, most respondents to the public consultation found that the tools and events set up by the EU agricultural and food promotion policy help boost communication and cooperation between stakeholders at EU level and in the Member States (CHAFEA portal, Info Days, matchmaking sessions), either strongly (37% of 134 replies) or moderately (32%). 8% reported that the tools and events have a neutral impact, 1% reported a negative impact, and 22% had no opinion.

The surveys and interviews with stakeholders indicate that the promotion programmes targeting non-EU markets bring EU added value because they perform better than promotion measures that lack an EU focus. They have higher visibility, resonate better with non-EU target audiences and benefit a larger stakeholder group because of their focus on categories of products and not brands. That the programmes provide EU added value is also confirmed by the fact that the policy enables promotion measures to be run that would otherwise not be possible, especially for small proposing organisations.

In terms of the effects of EU promotion programmes on the internal market, the greatest added value perceived by stakeholders both at EU and at national level is the increase in cooperation among trade operators and the scope for them to learn from each other. In addition, the EU dimension of the programmes is likely to strengthen the EU identity of agri-food producers and EU citizens, especially if the messages have a European dimension and are linked to EU policy areas. The Commission's own initiatives have substantial EU added value since strategic events benefiting organisations from all Member States and across product sectors would not be possible without action at EU level e.g. high-level missions and trade fairs lead to contracts for EU exporters and prepare the ground for fruitful promotion programmes. Own initiatives benefit organisations from all Member States and across all product sectors by representing the EU as a whole.

6. CONCLUSIONS AND LESSONS LEARNT

The **objective** of the evaluation was to examine the effectiveness, efficiency, relevance, coherence, and EU added value of the reformed EU agricultural promotion policy. The focus was on Regulation (EU) No 1114/2014, the main objective of which is to boost the competitiveness of the EU's agricultural sector.

The **scope** of the evaluation included promotion measures (simple programmes, multi programmes and Commission own initiatives) targeting both the EU and non-EU markets, implemented by proposing organisations from all Member States.

The **timeframe** for this evaluation was from 2016 to 2019 for the Commission's own initiatives, though only the first two years were taken into account for the simple and multi programmes (programmes that started implementation in 2017).

The evaluation faced a number of inherent **challenges and resultant limitations**.

- First, the timing of the evaluation meant that no programmes were yet complete, which affected the ability to fully assess effectiveness of measures at this time.
- Second, the wide range of programmes and Commission own initiatives meant that a 'one-size-fits all' approach could not be taken to analyse all programmes and initiatives. Instead, a purposeful selection of case studies was made to provide an in-depth analysis indicative of the bigger picture, albeit not representative of all programmes.
- Third, estimating the costs and benefits of the promotion policy in quantitative terms proved not to be feasible due to lack of comprehensive data. As a result, the assessment of links between operational and administrative aspects and efficient achievement of results was based primarily on qualitative data collected.
- Last, it was difficult to isolate the specific impact of the promotion policy from the impact of contextual factors such as markets developments, behaviour of competitors, changed preferences of consumers, marketing activities of private companies and promotion policy of competing countries outside the EU.

It is important to keep these aspects in mind when analysing and interpreting the results of the study.

Effectiveness

Although it is relatively early in the implementation process to fully assess the effectiveness of the EU agricultural promotion policy, the evaluation has shown that based on the preliminary data available the activities funded do effectively support the policy objectives.

There was limited evidence on the exact contribution the promotion policy made to the competitiveness of EU agricultural products as the promotion programmes funded in 2016 and 2017 are ongoing, and since most are an early stage, no final reports were yet available. However the stakeholders consulted considered that the policy has the potential to boost competitiveness, and there is evidence from the case studies that the selected programmes are contributing to increasing sales and consumption of the EU products promoted in the target markets. However, it is not yet possible to identify the most and least effective products or types of measure. Case study evidence suggests that certain specific activities supported increased competitiveness in particular markets, for

example those that focus on direct contact with consumers, networking at trade fairs and events, and using influencers and social media to promote products.

The support given to simple and multi programmes is effective and has the requisite characteristics to meet the specific objectives of raising awareness and the profile of EU products, quality schemes, and production standards. However, for several contextual reasons, it is difficult to quantify the impact of the programmes on sales and market share. The support focuses effectively on specific markets in non-EU countries with the highest growth potential. Measures implemented under the Commission own initiatives can be considered highly effective at paving the way for entering or expanding in non-EU markets.

The evaluation highlighted limits to the monitoring and evaluation system, which does not currently allow for a comprehensive assessment of the effectiveness of the promotion policy, and are areas for improvement.

Efficiency

The evaluation did not find major concerns related to efficiency. As a result, and at this stage, the EU agricultural promotion policy has been, in general, implemented efficiently. However, due to limitations of the monitoring and evaluation system and the lack of completed projects, the costs and benefits of most promotion measures could not be measured, in particular for promotion programmes. Some clear differences have emerged between the management of simple and multi programmes, with the level of efficiency varying according to the approach to management (with direct management being more efficient). There is scope to make efficiency gains for future programme implementation, particularly by increasing knowledge sharing.

Relevance

Overall, the stakeholder evidence indicates that the general and specific objectives of EU agricultural promotion policy are relevant and that they positively meet stakeholder needs and address market challenges.

The promotion policy seems to be particularly relevant for promotion programmes targeting non-EU countries, as they increase awareness and improve consumer perception of product quality. This is especially important for smaller producers entering a non-EU market for the first time, or organisations marketing relatively new products.

The evaluation support study identified some areas for improvement. In particular, it will be increasingly relevant to communicate about the central role the EU agricultural promotion policy can play in stimulating the transition towards a green and more sustainable European agricultural sector. For example, it will be important to highlight the economic, environmental and social sustainability aspects of EU agricultural products and production processes in the annual work programmes.

Regarding measures implemented with the objective of restoring market conditions after serious disturbances, the promotion programmes were found to have limited flexibility. However, no such measures were implemented over the reference period as no serious market condition was reported.

Coherence

Internal coherence

The assessment found the EU agricultural promotion policy to be internally coherent. The Commission own initiatives complement promotion programmes by addressing strategic questions, and promotion programmes benefit from positive spill over effects.

There is still potential to explore additional synergies, for example complementarity between beneficiary promotion programmes and Commission own initiatives, in particular when targeting similar markets or products (i.e. a more coordinated approach). In fact, high-level missions are often planned independently from the ongoing programmes (see the case for wine and spirits in the USA, dairy products in China, fruit and vegetables in United Arab Emirates, see Annex 2) whereas programmes are often run as a follow-up to high-level missions.

Coherence with national and private promotion measures

Based on stakeholder opinions and examples of single Member States, the EU agricultural promotion policy is broadly coherent with similar governmental and private measures implemented at national level. The promotion policy measures enhance the impact by promoting the same product characteristics or filling funding gaps. According to stakeholder interviews and case studies, the national context differs across Member States in terms of the national level measures available⁸². In some Member States, a number of government-to-government activities are run with the goal of trade promotion, while in others, there are dedicated funds to promote agricultural products. In others, there is no funding for such activities at all or the available budget is adapted in line with the availability of EU level support in order to avoid overlap.

Thus the two policy levels, EU and national, are coordinated to a large extent. Potential areas of tension in implementation were identified but were not backed up by specific examples.

Coherence with other EU policies

The assessment did not identify any major inconsistencies between the EU agricultural promotion policy and other EU policies, including, health, climate and environmental and development policies.

However, there are some examples of promotion activities that can be perceived inconsistent with other EU policies, with respect to their potential impact. Accordingly, promotion of specific product types (e.g. those which in certain circumstances can be considered as harmful to human health), production methods (e.g. those that may have a negative environmental and climate impact) and in certain markets (e.g. developing countries) will need careful attention in light of evolving priorities, such as the European Green Deal, the farm to fork strategy, the Europe's Beating Cancer Plan initiative, among others.

⁸² In some Member States, a number of government-to-government activities are run with the goal of trade promotion taking place, while in others, there are (i) dedicated funds for the promotion of agricultural products, or (ii) no funds for such activities, or (iii) available funds adapted in accordance with the availability of EU-level support at EU level in order to avoid overlap.

The strategic priorities of the annual work programme should be set in view of the evolving priorities and developments in other relevant EU policy areas, aligning with climate, environmental, health and development policy objectives. The capacity of the annual work programmes to address such developments is well demonstrated in the annual work programme for 2021, which dedicates 50% of the budget to topics supporting the farm to fork objectives such as promotion of organics, of sustainability and of consumption of fruit and vegetables in the context of balanced a proper dietary practices.

EU added value

Promotion measures designed and managed at EU level generate specific EU added value, with their focus on categories of products, rather than brands. This brings an EU dimension to cooperation and provides opportunities for learning and cooperation among EU trade operators that go beyond the purview of national or private-sector initiatives.

Commission own initiatives can be particularly valuable in paving the way for EU, national and private-sector promotion measures. Having a visible EU presence in fairs and high-level missions generates a stronger impact on awareness of products and market shares than national bodies acting on their own. When discussing the added value of EU promotion programmes on the external market, the stakeholders consulted believe that EU promotion programmes are better able to boost the position of EU products in non-EU markets.

Indeed, promotion measures achieve a higher level of visibility due to cooperation between multiple stakeholders and therefore the scope to implement larger-scale programmes. This should be particularly the case for multi programmes, which have a higher budget and are implemented by multiple organisations from across the EU.

Lessons learnt

Despite the methodological limitations hindering a comprehensive and timely assessment of all aspects covered in the evaluation, the following lessons can be drawn. They can help shape the future development of the EU promotion policy:

- The focus on specific markets in non-EU countries with the highest growth potential, tailoring awareness raising measures to the targeted audience and engagement with opinion leaders, traditional and social media advertisements (already frequently used in the promotion programmes and Commission own initiatives), tastings, trade fair appearances, and information stands have proven highly effective in pursuing the objectives of the policy.
- The monitoring and evaluation system for the simple and multi programmes are not fit for purpose in their current form, making it nearly impossible to demonstrate the impact of the programmes, as well as the efficiency of the Commission own initiatives. Before the next programming period, the monitoring and evaluation system could be reviewed for the simple and multi programmes to ensure it is fit for purpose. Specifically, the scope to use qualitative indicators at results level can be further explored and a concise list of mandatory indicators drawn up. Concerning the measures taken under the Commission's own initiative, there is also room to improve the definition and application of indicators to track performance and facilitate sharing of the lessons learnt.
- The management procedures associated with the simple programmes are considered complex and work-intensive.

- The annual work programmes need to be endowed with enough flexibility to set the strategic priorities taking into consideration the overarching Commission priorities.
- The ‘Enjoy! It’s from Europe’ signature is more suitable and promising for non-EU countries markets than for the EU market. The evaluation found scope to increase the EU added value of the agricultural promotion policy by stepping up exchanges of knowledge and experience between beneficiaries, increasing the use of the signature ‘Enjoy! It’s from Europe’, exploring synergies between promotion programmes and Commission own initiatives, and improving coherence with other EU policies.
- In view of evolving EU priorities and broader policy developments, the promotion policy needs to be adaptive in order to address such developments and ensure its alignment and coherence with other policies (notably the Green Deal, Europe’s Beating Cancer Plan, and farm to fork strategy).
- Promotion policy has the potential to play a supporting role in the transition towards a green and sustainable European agricultural sector from an economic, environmental, health and social perspective (as demonstrated in the 2021 annual work programme).
- In the long term, it could be worth considering options to streamline and harmonise the management of simple and multi programmes. For Commission own initiatives, although the diplomatic nature and sensitivities of the measures carried out require the use of tailored and flexible approaches, it would help track the efficiency of events if the measurement of reporting indicators was consistent.

It would be useful to carry out a study to provide a comprehensive overview of all governmental and private-sector initiatives in the Member States, with the aim of positioning EU-level action even more strategically within the different national contexts.

ANNEX 1: PROCEDURAL INFORMATION

Lead dg, decide planning/CWP references

Lead DG of this evaluation is DG Agriculture and Rural Development.

The registration in DECIDE is PLAN/2018/2893.

The Roadmap for public feedback on the design of the evaluation was open from 18 July 2018 until 15 August 2018.

A support study “Evaluation of the EU agricultural promotion policy – internal and third countries markets” was commissioned under Specific Contract No. AGRI/07/2018/Lot 1 implementing Framework Contract No. PO/2016-06/01-Lot 1, signed by the parties on 20 December 2016.

The specific contract came into force on 11 July 2019.

Organisation and timing

The following Directorates General and General Services participated in the Steering Group of the support study: Agriculture and Rural Development, Environment, Maritime Affairs and Fisheries, Health and Food Safety, Budget, Secretariat-General, Communication, Eurostat as well as the Executive Agency for Consumers, Health and Food Executive Agency (CHAFEA).

The Steering Group held nine meetings. The kick-off meeting was held on 22 July 2019.

The evaluation support study was delivered on 2 September 2020. From this a version meeting the official OPOCE publication requirements was prepared and published on 14 October 2020.

Evidence, sources and quality

The evidence of this evaluation is based on interviews and surveys of key stakeholders, six case studies carried out by experts, comprehensive literature review and desk research. In addition stakeholders were consulted in the respective Civil Dialogue Group and an online public consultation provided additional opportunities for stakeholders and the wider public to express their views.

In view of data limitations signalled in this evaluation the case studies are an important part of the evidence of the evaluation. Six case study countries were chosen for this evaluation, each representing a combination of (a range of) promoted products and a targeted country.

All case studies followed the same general approach and applied the same methodology. A case study template and guidance was prepared to seek as much homogeneity as possible and to allow the results of the case studies to be synthesised in a streamlined way.

ANNEX 2: STAKEHOLDER CONSULTATION

The Roadmap for public feedback on the design of the evaluation was open from 18 July 2018 until 15 August 2018. A majority of stakeholders, in particular non-governmental organisations, urged for a design with particular attention for the coherence with EU health policy and climate action. The design of the evaluation was adapted accordingly.

For this evaluation a public consultation was held as well as surveys of key stakeholders.

Surveys of stakeholders

To collect the views of a wide base of stakeholders impacted by the policy two online targeted surveys were held: one survey targeting the national competent authorities, while the other targeted the proposing organisations and implementing bodies, including successful and unsuccessful applicants.

The questions of the online surveys followed closely the five evaluation themes (effectiveness, efficiency, relevance, coherence and value added) as well as the six evaluation questions.

The online surveys targeting national competent authorities and proposing organisations and implementing bodies were active for a period of six weeks, from 28 October to 6 December and were exceptionally extended to allow National Competent Authorities to provide responses until end December 2019.

The complete survey analysis is presented in Annex 1.C of the evaluation support study.

The initial response rate for both online surveys was low, which is why a reminder mail was sent to encourage participation and the deadline for responding to the online survey targeting national competent authorities was extended. There were about 140 respondents in total, the exact number was dependent on the particular question.

Public consultation

The public consultation was conducted from 8 May 2020 to 11 September 2020 using EU Survey, via the European Commission's website⁸³, in all official EU languages excluding Irish. It investigated, in particular, the measures adopted under the 2016, 2017 and 2018 annual work programmes, including both promotion programmes (promotion actions in the EU market and in third countries, put forward by proposing organisations), as well as measures carried out at the initiative of the Commission (high level missions, trade fairs, own campaigns and technical support services).

A total of 144 contributions were received from 19 EU Member States⁸⁴ and Ecuador, with different levels of replies. The 144 replies received in the public consultation result in a low statistical significance.

⁸³ <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/1859-Evaluation-of-the-EU-agricultural-promotion-policy/public-consultation>

⁸⁴ Including the United Kingdom (UK). There were no contributions from Bulgaria, Cyprus, Greece, Croatia, Latvia, Luxembourg, Malta, Slovenia and Slovakia

Non-governmental organisations provided the most contributions to this consultation accounting for 25% of all respondents (number of responses (N) =36), closely followed by business associations accounting for 24% of all respondents (N=35) and by companies/business associations accounting for 19% of all respondents (N=27), therefore companies and business associations together represented 43% (N=62). Of all the respondents, EU citizens constituted 12% (N=17), public authorities 8% (N=12), academic/research institutions 1%, trade unions 1%, consumer organisations 1% and environmental organisations 1%. The remaining 8% of respondents identified themselves as 'others'.

The most represented sectors were agro-food and agriculture/forestry (constituting 33% and 26% of all respondents respectively). Least numerous were civil society and environmental protection (13% together) and trade (6%). Rural development, development cooperation, energy and health accounted for 1% each. In addition to that, 'others' accounted for 15%.

As for their role in the promotion of agricultural and food products, the most represented categories were proposing organisations (38%), implementing bodies and national authorities (8% each), followed by evaluation bodies (1%). The remaining 46% of respondents declared 'other' or did not provide a reply.

A total of 96 respondents (67%) chose to make their full personal details (i.e. name, organisation name and size, transparency register number, country of origin) available for publication with their contribution, with a minority, 48 respondents (33%) opting for anonymity.

A significant share of these respondents had already participated in the interviews and surveys conducted as part of the external evaluation study carried out earlier in 2020 also in the context of the evaluation of the EU promotional policy for agricultural products.

In general, a majority of the respondents gave a positive answer to the questions, i.e. totally agreed and tended to agree with the question asked. No striking differences were found between the different respondent groups.

A high majority of respondents (96% of 141 replies provided to the specific question) were aware of the EU agricultural and food promotion policy covering various agricultural products. However, only a third of the respondents (30% of 142 replies provided to the specific question) were beneficiaries of funding schemes that are part of the EU agricultural promotion policy.

The findings of the public consultation have been presented in the relevant analytical chapters on the different evaluation criteria, but can also be found, as a single summary document on the consultation website for the evaluation⁸⁵.

A number of **open questions** were included in the consultation. Table 2 presents an overview of replies on how promotion policy can be made more coherent with the sustainable food systems as described in the European Green Deal, while reflecting sustainability in economic, environmental, social and health aspects.

⁸⁵ <https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/1859-Evaluation-of-the-EU-agricultural-promotion-policy/public-consultation>

Table 2 Replies to open question on coherence

Environmental sustainability	<ul style="list-style-type: none"> • Promotion should focus on the reduction of climate footprint • Positive discrimination in the promotion of 'KM0', local, more sustainable production (which cannot benefit from scale economies of large companies) • Differentiation between organic & sustainable production. Not the same focus on both, sustainable should be at least as significant as organic production • Promotion focusing on artisanal meat • Conventional poultry meat production more sustainable than its organic counterpart (less intensive in greenhouse gas emissions / meat production), therefore, eligible for application • But increasing sustainability requirements could affect EU's agricultural sector competitiveness (if non-EU countries do not have the same standards) • Incentives provided may not be enough to achieve ecological transition • Coordinated action with other policies to achieve sustainability • Promotion should help avoid overconsumption and waste generation
Health	<ul style="list-style-type: none"> • Promotion should focus on products which positively affect health • Wine sector promotion usefulness being questioned by ECA, wine's healthiness questioned; but there is no justification for measures against promotion of responsible consumption • Promotion supporting Farm-to-Fork change of diet (focus on diets and not certain foods, respecting Europe's rich food culture differences), GIs as part of a diet, not individually picked • Promotion of Pork should be reduced in favour of other meats, or ideally vegetal products • Consumer diets should not be established by major food-company lobbies • But meat should still be part of diets
Quality	<ul style="list-style-type: none"> • Ensure that EU marketing standards continue to focus on the quality aspects of the products;
Scope	<ul style="list-style-type: none"> • Allow funding for non-food agricultural products, as city plants or similar • Promotion applicable (and qualification) to plant-based food and drinks • Promotion applicable (and qualification) to all kind of foods and drinks • Budget should respond to the priorities established by the European Commission (Farm-to-fork, Green Deal, and other policies to come) • Promotion should also support innovation in non-food sectors, like packaging or traceability, strongly related to food.
Animal Welfare	<ul style="list-style-type: none"> • Promotion should be applicable to companies with a good treatment towards livestock • Promotion in third countries could allow improving those countries animal's overall welfare
Competition	<ul style="list-style-type: none"> • Possibility of EU FTA's hindering EU promotion policy, as consumers could acquire foreign, cheaper products which could not meet the same quality, environmental and sustainability standards as the Europeans one • But it is also necessary to promote sustainability, reduced environmental impact policies, etc., with third countries • Promotion should support EU products' competitiveness worldwide, whilst not affecting third countries' small, local farmers

Table 3 presents an overview of replies on the most essential benefits of EU agricultural and food promotion policy measures and funding that Member States, acting on their own, could not achieve.

Table 3 Replies to open question on EU added value

Internationally	<ul style="list-style-type: none"> • Increases competitiveness regarding third country suppliers, boosting exports • Impacts on third countries' production schemes to supply the European consumer, overall increasing their efficiency, sustainability, production standards and quality • Stronger presence in global markets (by the 'Enjoy it! It's from Europe' logo)
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Internally	<ul style="list-style-type: none"> • Allowed for a common position between all Member States, increasing cooperation • Rewards rural development • Strengthens the internal market • Levels the playing field for all Member States • Common labelling, consumer information increases
Economically	<ul style="list-style-type: none"> • Supported maintaining/improving the standard of living of farmers • Easier to create economies of scale across countries • Access to information and consumers of other Member States (CHAFEA portal) • Lower prices for consumers
Politically	<ul style="list-style-type: none"> • Eases policy coherence throughout Europe due to the competences the EU has (like matching foreign policy and agricultural and food promotion, if the latter was a national competence) • Agricultural and food promotion acquire transnational visibility (and importance), showing common positions and strengths, and achieving common goals <ul style="list-style-type: none"> • Allows promotion of European quality schemes (protected designation of origin and protected geographical indication in particular)
Environment	<ul style="list-style-type: none"> • Farmers in the EU are rewarded for maintaining the environment • Animal welfare increased equally across Europe
Others	<ul style="list-style-type: none"> • Using other measures of success apart from its economics, like public health improvements

Table 4 provides an overview of replies on how the EU agricultural and food promotion policy can be improved,

Table 4 Replies to open question on improving the promotion policy

Clarification and simplification	<ul style="list-style-type: none"> • Simplification of the application/submission process (systemised system, all information and materials in a single place and in all EU languages) • Consistent guidance from competent authorities for simple programmes • Definition of major and minor changes for specific programs • Anticipating the publication of the call and increasing the number of information events, including in the Member States • Extending the range of possible proposers to new forms of territorial aggregation • Improving transparency, accountability of the promotion policy • Promotion should allow for better visibility of origin for consumer information purposes • Coherence with other EU policies (and external policies) • Promotion preference for SMEs and young farmers • Flexibility for the proposing organisations by removing the percentage constraints for the representation of the sector • Products with GIs should not be automatically considered priority of promotion • Allow to be eligible costs those incurred prior to a programme commencing, along with an increased advance payment • Proposing organisations to be allowed to make small amendments to programme activities if of low value without detailed explanation • Creation of a two-step application process, where the second is only accessible after passing the legibility test <ul style="list-style-type: none"> • Creation of specific sub-categories for each quality scheme in the promotion policy calls (protected designation of origin, protected geographical indication, traditional speciality guaranteed, organic products, the OQT “outermost region” and the OQT “mountain product”) • Brand visibility to be increased further than 5%, giving a higher return to participating companies • Make the management of simple projects and multi projects more homogeneous, by defining more precise guidelines with the Member States • Available forms of promotion for digital communication channels should be extended • Management should be done from CHAFEA and not at national level
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Budget	<ul style="list-style-type: none"> • Payment system to be more frequent than once a year (quarterly) • Flexibility between simple and multi-programme's budget • Result based remuneration for addressing environmental challenges • Turn direct payments into payments for public goods • More resources for programmes in the EU internal market • Increased co-financing rate for 'geographical indication' campaigns over 70% • Budget for animal products should be reduced in favour of plants (through transition plan) • Budget prepared to adapt to unexpected negative events
Promotion criteria	<ul style="list-style-type: none"> • Promotion should be based in future necessities according to the environmental boundaries • Sustainability as a requisite to access promotion • Competitiveness targets of the policy should be revised, in favour of public good targets • Need to allow funding for non-food products, as city plants or similar (with specific annual strategic priorities as the current ones would not apply in the current form) • Promotion Policy eligibility further adapted to the particular specificities of Outermost regions' productions, like eligibility to individual products • Revision of indicators, ensuring they comply with the Sustainable Development Goals and the Convention on Biological Diversity • Promotion should go in hands with rural development • Promotion in 3rd countries (with policies like Enjoy it! It's from Europe) should take into account the country's language, and be simpler in its message (inclusion of co-financing may be confusing) • Promotion should increase the recognition of GIs among consumers • Producers and producers organisations should be able to be eligible • Promotion should show coherence with other EU policies, especially EGD and F2FS • Add the principle of rotation of beneficiaries (proposers and partners) in order to ensure that the same organisations/products are not always covered by the aid • But keeping fair competition and funding best proposals • Change requirement of representativeness from 50% to a lower standard
Environment	<ul style="list-style-type: none"> • Raise environmental standards (reduction of antibiotics, imported protein feed and foods from peat, use of compost) • Promotion should further increase KM0 production (especially under-consumed products) • Increase promotion to new plant-based food, and to plants overall, in contrast to meat (even the level play field) • Promotion of mitigation of greenhouse gas effects and circular economy • Further protection of farmland biodiversity
Others	<ul style="list-style-type: none"> • Reduction of promotion for meat (and pork especially) and alcohol • Wine products to be part of the promotion policy • But maintaining the ban to hard liquors • Member State quality indicators should be allowed along the European ones

Table 5 provides an overview of replies with respect to the budget allocated to promotion policy, and the allocation among multi and simple programmes therein.

Table 5 Replies to open question on budget (allocation)

General budget changes	<ul style="list-style-type: none"> • All the budget should be adapted to promote sustainable proposals and fulfils long term environmental objectives • Overall larger general budget (and increasing as time goes on) • Greater focus (and budget) for programmes targeting EU's internal market (targeting that of the 3rd countries') • Increased budget for third country promotions • Flexibility with budget allocations when funds are not fully executed • Removal of sub-divisions to achieve further funding flexibility • Creation of a post-COVID promotion
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	<ul style="list-style-type: none"> • Increased budget for quality schemes • Budget adapted for the actual needs of the year, with a buffer for unforeseen events
Multi programmes	<ul style="list-style-type: none"> • Larger budget share to multi-programmes, as they incentivize EU cooperation and goes with the EU integration spirit • Larger co-financing rates in multi programmes • More flexibility to address international crisis/events, with possibility to increase budget in such times of market disruptions • Facilitate the possibility of finding other EU partners to increase attractiveness, as there are numerous claims on the difficulty of finding partners
Simple programmes	<ul style="list-style-type: none"> • More flexibility to address international crisis/events, with possibility to increase budget in such times of market disruptions • Resources potentially increased depending on the demand • Increase of resources as agricultural actors consider they carry a lower cost and simpler implementation than multi programmes

Respondent were given the opportunity to add further information within the scope of this questionnaire and provided the following:

<ul style="list-style-type: none"> • Redefinition of the objective of competitiveness in promotion • Overall alignment of the promotion policy with the Farm-to-Fork Strategy and the European Green Deal objectives • Diet change promotion, more fruits and vegetables & less meat • Reinforcement of the promotion policy required to promote consumption in after the COVID pandemic • More room to national authorities for decision taking • Increase interaction possibilities with CHAFEA directly • Decrease inconsistency between the decisions from CHAFEA and Member States • Increase financial analysis of files to avoid defect • Equalize conditions for applicants across all the Member States (Member State demand different requirements than others) • Overall transition towards digital procedures in all Member States equally, as still some Member States demand paper versions, where others do not • Revision of the evaluation criteria is necessary, and its technical requirements • Further promotion policy coordination with each individual Member State (bottom up instead of top down) • Increase access to statistical data on the topic for academic research • For further questionnaires, more questions linked to the European Green Deal and Farm-to-Fork Strategy should be shown • Promotion policy should account for the issues smaller Member State organisations face and their lack of national support in comparison with bigger Member States
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Around 40 respondents uploaded documents to elaborate in more detail on their opinions about the current promotion policy as part of the public consultation, which are summarised below.

The respondents welcomed the opportunity to present their views on the implementation of the EU promotion policy. Most respondents recognise this policy as being fundamental to support the competitiveness of the sector and the transition to a more sustainable EU agricultural sector. The promotion programmes as well as the actions on the initiative of the Commission strongly support the different agricultural sectors meeting the highest standards of quality and raising the awareness of the unique features of EU agri-food products and production methods within the EU and in third-country markets.

The respondents also support the need to use the forthcoming review of the promotion policy to modernise the policy and better support the transition to a more sustainable EU agriculture in line with the farm to fork strategy and the European Green Deal.

General remarks from producers and national authorities

A significant share of **producers** requested a larger budgetary envelope for promotion policy. In particular most fresh fruits and vegetable producers privileged support for promotion actions in the internal market. Focusing on the internal market rather than on third countries was also emphasised by several respondents who found that this would be more adapted to cope with the Covid-19 crisis. Some respondents would like to see the support to simple programmes increase (Irish producers for example, for which traditional partners for multi programmes were from the UK). Some representatives emphasised the difficulty of participating to the calls for proposals and the need for more capacity-building and information actions to be organised to support applicants who are not experienced applying for promotion policy support.

The responses submitted by **national authorities** insist that promoting the high standards of the European agricultural production should be the main focus of the promotion policy. Some Member States highlighted difficulties faced by smaller organisations in their countries who are not eligible, or do not have sufficient financial capacity to submit applications given the current rate of co-funding required.

Management aspects

For most respondents, the management of the promotion programmes should be harmonised between simple and multi programmes. Some respondents also request more guidelines and support before and during the application process, support that should be available in all European languages.

Some respondents ask for more flexibility on the financial arrangements like more advance payments, interim payments in place of annual payments. Some underline the need for digitalisation of report transmissions from proposing organisations to Member States. They also emphasise the need for a simplification of the requirements applied during the selection of the implementing bodies. Some respondents suggested that two calls for proposals per year would be more adequate.

Several respondents requested higher contribution from the European Commission on the co-financing rates, and a two-step selection procedure that would reduce the submission costs.

Input of the producers representatives

There were conflicting views expressed between the agricultural and the processed food producers. Each of these sectors requesting more budget for their own products. Several representatives of quality products request that the promotion of agro-tourism activities should become eligible in the future. Wine producers representatives regret the mandatory basket approach for the promotion of wine.

Some respondents believed that the rules applicable to co-funded programmes were overly restrictive and did not allow them to communicate sufficiently on their own brands, or on the origins of the products.

Some respondents emphasised that more resources should be allocated to the promotion of specific sectors facing difficulties as a result of market disruptions, in particular in the Brexit context. The respondents representing exporters believe that more resources should be dedicated to maximising commercial opportunities derived from the trade agreements signed between the EU and its trade partners.

The representatives of the fruits and vegetables sector recall that due to the perishable nature of their products, they need to focus more on the internal market than on third

countries. They also emphasise the need to promote the consumption of fruits and vegetables for health purposes. Some respondents also requested widening the eligibility criteria in the calls to include for example plant protein food and drinks, edible insects' products etc...

Input of the Non-Governmental Organisations

The non-governmental organisations active in the environmental domain stress that competitiveness alone should not be the general objective of the promotion policy. The policy should also contribute to change food behaviours towards more sustainable diets, promote healthy diets for the prevention of non-communicable diseases, participate to the effort towards sustainable livestock management and protection of wild animals and biodiversity, and overall support the transition to more sustainable agricultural practices. In the views expressed by the respondents, a single focus of enhancing competitiveness is incompatible with the Sustainable Development Goals and the Farm to Fork Strategy. For some of them, promotion budgets should be directed exclusively to production and consumption of organic, healthy, minimally processed wholegrains, fruit, vegetables, nuts, legumes and other plant nutrition. Moreover, conventional agriculture should no longer be supported for export, only sustainable agriculture would be eligible to benefit from promotion policy co-funding.

ANNEX 3: METHODS AND ANALYTICAL MODELS

This section presents an overview of the methodological approach, as well as the challenges faced and actions taken.

Objectives and scope

This evaluation provides a holistic assessment of the EU's reformed agricultural promotion policy and in particular the information and promotion measures funded through this policy on the basis of the five evaluation criteria defined in the European Commission's Better Regulation Guidelines (relevance, effectiveness, efficiency, coherence and EU added value). The evaluation questions were operationalised into an evaluation questions matrix, linking the questions to judgement criteria and indicators as well as the data source foreseen for their collection⁸⁶.

The evaluation had two purposes: summative (i.e. provides an independent, evidence-based analysis of the extent to which the EU agricultural promotion policy has achieved its objectives and generated the expected results and impacts) and formative (i.e. assesses how and why the EU agricultural promotion policy has achieved - or failed to achieve - its objectives, which aspects have worked more or less well, and how it could be improved).

Evaluation design

This dual purpose of the evaluation required a mixed-methods approach, drawing on a range of methods and tools to compile and analyse relevant quantitative as well as qualitative data and information, in order to provide a robust, nuanced assessment not only of what the effects of the EU's agricultural promotion policy have been, but also how and why these have been generated, while paying due attention to the different main features and innovative elements introduced by the new legal framework.

The evaluation approach had to respond to a number of methodological challenges. Before detailing the specific data collection strands in more detail, a high-level summary is provided of the methodological challenges which informed the design and delivery of this evaluation and highlight the residual limitations⁸⁷.

⁸⁶ The full evaluation question matrix is provided in Annex A but each evaluation criteria and question recall the judgement criteria, indicators and data sources used.

⁸⁷ Where necessary, the specific impact of these challenges, e.g. on the assessment of effectiveness or efficiency are also recalled in the introduction to the answers to those questions to ensure these are understood in the review of the findings.

Table 6 Challenges faced, approach taken and residual limitations

Challenge	Approach and residual limitations
<p>Heterogeneity of programmes and initiatives and representativeness of case studies</p> <p>The lion's share of the funding under the 2016-2018 annual work programmes has been awarded to more than 200 separate programmes, including simple and multi programmes targeting different audiences and markets in EU Member States as well as third countries, and promoting a wide range of different agricultural products and key messages. It is recognised from the outset that assessing the overall, aggregated impacts of such a diverse set of separate activities is extremely challenging. A 'one-size-fits all' approach would not do justice to the significant diversity of measures and their objectives. And the evaluation budget, although substantial, will not allow for an in-depth coverage of the entire breadth and variety of information and promotion programmes and initiatives, meaning a selective approach will be required. Further, although not as substantial in budgetary terms, the EC own initiatives are high profile and distinct in the delivery structure to the programmes.</p>	<p>A two-pronged approach was used, which combines a holistic view of the policy (via desk research, scoping interviews and surveys) with in-depth analysis of case studies of specific programmes / initiatives giving rise to specific examples and evidence of how delivery plays out in practice. Further, the assessment of the EC own initiatives was clearly delineated from the assessment of the simple and multi programmes to reflect the difference in scope and implementation.</p> <p>In practice, the choice of the unit of analysis for the case studies was a crucial element of the methodology and might affect the results of the study. For this reason, different criteria were proposed to guide the choice, and consulted with experts and the Commission to agree and be transparent about the trade-off.</p> <p>The sample of six case studies allowed differences and inconsistencies to be highlighted. The findings from the case studies were used to demonstrate or provide counter examples to illustrate the findings from the more general evaluation of the policy. Nevertheless, the agreed sample had some inherent limitations, which related to the trade-off between the depth and breadth of the case studies, where focusing on an extended sample of measures and countries would necessarily dilute the analytical focus presented in the proposal.</p>
<p>Underestimating the impact of contextual factors</p> <p>It is impossible to isolate the impact of the EU-funded measures from that of other developments. In fact, the budget is likely to be relatively small when compared with the cumulative spend by different private as well as public actors from across the EU and outside the EU on promoting their agricultural products. Wider socio-economic developments (e.g. an economic downturn, national health policies, or the conclusion of a new trade agreement) can obviously also affect the evolution of many of the indicators of interest.</p>	<p>First and foremost, existing information was synthesised, including the data reported on the indicators. That exercise was complemented with stakeholder perception through surveys and interviews. To the extent possible, concrete evidence of the coherence with other initiatives (at EU and national level) was explored. However, a limitation of the study remained the challenge of attributing change to the promotion policy rather than broader contextual factors. In particular for the coherence with EU development policies conclusions can only be drawn on a case by case basis.</p>
<p>Difficulties in estimating costs and benefits</p> <p>With regard to the Evaluation Questions under Efficiency, estimating the costs and benefits of this policy in quantitative terms is not feasible.</p>	<p>Input collected through the online survey and interviews was used to explore and assess how operational and administrative aspects influenced the efficiency with which the achievements were attained. Whereas a fixed number of interviews was held, the survey was disseminated to all applicants of funding, whether successful or unsuccessful, in order to have a significant sample of respondents. The number of responses received are included in Annex C.</p>

<p>Reliance on availability of reports and data</p> <p>Already in the initial analysis a risk is cited relating to the quality of indicator data and reporting relating in part to the stage of delivery of the programmes. More specifically:</p> <ul style="list-style-type: none"> -No final reports were available for the programmes funded in the period under review (2016-2019). Interim reports are available for multi programmes funded in 2016 and 2017 annual work programme. However, these are of varying content and quality; -No final indicator data compiled by independent evaluators was available at this stage in implementation. Self-reported output and result indicator data are available for most of the simple and multi programmes funded under the 2016 and 2017 annual work programme, however these are incomplete. There is limited availability of self-reported impact indicators (i.e. for multi programmes only). 	<p>Given the early stage of the programmes, the Steering Group meeting on the 1st Interim Deliverable resulted in a decision to use the indicators with caution or not at all. This implied the need to make more use of qualitative data (i.e. insights from stakeholders) and back these up with concrete examples where feasible, as detailed in the updated EQM. As detailed in the answer to effectiveness - EQ2 (sub-question 5) - these issues also informed the analysis of the adequacy of the monitoring system. Relying on qualitative information, collected through interviews and surveys, might introduce some subjectivity in the judgement (e.g. the perceptions of proposing organisations and other stakeholders about the effects of the policy in general may be subject to optimism bias).</p> <p>The use of standardised judgement criteria and indicators aims to moderate this factor, but it remains a limitation. It is clearly stated when a judgement is based on opinions, which are further substantiated with examples.</p>
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Data collection methods

Based on the above methodological considerations, the mixed methods for collecting data are listed below. The first three elements (the document and data review, the EU-level interviews and the online surveys) allowed to gather data on the policy as a whole, while the case studies facilitated a deeper exploration of the activities and effect of a limited number of measures.

- **Document and data review (EU-level):** carried out in English to collect any existing quantitative and qualitative data on the different elements of the intervention logic.
- **EU-level interviews** with (1) the relevant European Institutions and agencies involved in the programming and implementation of the EU promotion policy, (2) external evaluators for the selection of applications, (3) those involved in other EU policies in the field of environment, climate change and health (e.g. DGs for Health and Food Safety, Maritime Affairs and Fisheries and Environment) (4) pan-European agricultural producer and trade organisations and associations and (5) a non-governmental organization.
- **Two online surveys:** To collect the views of a wide base of stakeholders impacted by the policy: one survey targeting the competent national authorities (CNA), while the other will target the proposing organisations (PO's) and Implementing Bodies (IB), including successful and unsuccessful applicants.
- **Case studies:** data for the case studies was collected through:
 - **Case study document and data review:** this includes programme implementation or evaluation reports (or if available, evaluations at Member State level aggregating results of all programmes funded), as well as other relevant secondary data to assess the effects of the programmes (e.g. on the consumption of the particular product in the target market, as well as the export of the product from the relevant EU Member States or EU as a whole to the target markets).
 - **Targeted interviews:** with at least one competent national authority and one proposing organisation per programme. Where the programme targets a third country, the interviews will also include a member of the EU Delegation in the country, a relevant producer or trade association, and where feasible business delegates in the country, etc.

Evidence base and operational challenges

Documentation and indicator data review

The document review was carried out in order to collect and analyse existing qualitative and quantitative data on the different elements of the intervention logic. The review covered:

- EU level documents and relevant wider literature (especially concerned context and needs);
- Simple and multi programme indicators; and
- Materials and documents on EC own initiatives.

A complete list of EU level documents reviewed is provided in technical Annex B; together with a table summarising the compiled output and result indicators for simple and multi programmes.

EU level documents and wider literature

Documents were reviewed to gather all types of data informing particular parts of intervention logic of the policy (especially its needs and objectives) and other relevant information (e.g. background of the policy). A database of all documents identified during the inception phase, and all documents shared by DG AGRI and CHAFEA in the interim phase was established mapped to the evaluation criteria. The review of the EU-level documents covered:

- EU legislation underpinning the EU agricultural promotion policy;
- Programming documents (i.e. annual work programme and calls for proposals);
- Any relevant implementation and evaluation / assessment reports (e.g. the Commission 2018 interim report, CHAFEA surveys of applicants);
- Other relevant documents included, for example:
 - EU policy documents on the field of agriculture, health, environment and climate change;
 - positions of DGs, non-governmental organization and document review of meeting minutes provided by DG DEVCO (International Cooperation and Development) from meetings with non-governmental organizations;
 - minutes of the Civil Dialogue Group and CMO Committee;
 - literature pertaining to the EU competitiveness in the agriculture sector and information providing context for market developments.

A review of market share data and documentation was conducted in the context of case studies (see below).

Simple and multi programme indicators

Our review of the programme indicators included all available output and result indicators used for reporting on simple and multi programmes funded in 2016 and 2017⁸⁸.

The indicators were provided by CHAFEA and DG AGRI. Complete indicator data was available for 74 simple programmes and all multi programme⁸⁹.

⁸⁸ As agreed in the inception phase, while most programmes were not yet reporting on impact indicators (due to the stage in delivery). Where they were available, they were not deemed relevant for review at this stage in the delivery cycle of the programmes and were excluded from the analysis.

⁸⁹ BE: partially available (missing data for 1 programme in 2016); EL: not available (missing data for 8 programmes funded in 2016 and 4 in 2017); FR: partially available (missing data for 2 programmes in 2016 and 6 in 2017); IT: not available (missing data for 9 programmes funded in 2016 and 4 in 2017); LT: partially available (missing data for 2 programmes in 2017).

Table 7 Overview of multi and simple programmes reviewed

	2016		2017		TOTAL (2016+2017)	
	Multi	Simple	Multi	Simple	Multi	Simple
Total number programmes funded	6	58	10	52	16	110
Sample of reports/data <u>shared</u> with the evaluation team by 10 December 2019	6	38	10	36	16	74
Reports/data <u>missing</u> as at 10 December 2019	n/a	20	n/a	16	n/a	36

All the indicator data for simple programmes was compiled into one excel sheet, by extracting data from 74 individual excel sheets. On this basis, an overview table with data on individual programmes was populated and cross-referenced with the full list of programmes funded to validate and clean the data received. The data for the multi programmes was then integrated.

Operational challenges faced:

The process of consolidating the data for simple programmes relied on a need to manually combine the data and check for gaps and correct for minor errors identified in the separate data files. In doing so, the following issues were identified:

- Minor inconsistencies and typos in names of data files;
- Inconsistencies in formatting of indicators values provided;
- Missing programme identification data (especially target markets).

The clean and validated data now provides a basic overview of programmes and indicator values and will serve as a useful resource for further analysis.

Documents and data on Commission own initiatives

The documentary review of data provided on EC own initiatives was also based on the materials shared by DG AGRI. The initial research in the inception phase suggested 36 EC own initiatives were funded over the period of review. There was a question how to ensure consistency in the period of revision with the review period for the promotion policy programmes. It was decided to cover the period 2016-2019 for EC own initiatives but to present the answer to effectiveness of these initiatives separately (to account for the difference in scope).

The documents received included technical reports, media coverage reports, and data on Key Performance Indicators tables. A full list is included in Annex B.

Operational challenges faced:

- **Cross-referencing:** The names of the EC own initiatives in the internal excel file shared by DG AGRI listing the 36 funded measures, did not always correspond to the name given to the initiative in the technical report. In those cases, the mapping was based on other information provided such as the target country or type of mission.

- **Timing of evaluation and availability of reports.** Most of these gaps are explained by the novelty of certain activities which were launched in 2019 and thus the reporting has yet to be finalised. This was caveated to the extent possible, by doing additional desk research on the topic to try and draw some results. Remaining gaps come from the fact some documents have not been provided by contractors to the EC.
- **Limited qualitative information on results and impact and timing of evaluation:** the reports that were available most often did not provide the required information that would allow to assess the effectiveness of the measures funded. The reports included qualitative descriptions of outputs, rather than results. Moreover, technical reports provided an abundance of logistic and organisational details, which is useful for internal auditing and monitoring, but which cannot tell us about whether the objectives of the missions / measures were achieved. The Key Performance Indicators (KPIs) provided more information on results and impact although the data remains limited as some initiatives hadn't yet filled out KPIs, had partially filled them out or had limited results and impacts to share at the time of drafting.

In depth interviews

The aim of these interviews was to collect qualitative feedback on the relevance, effectiveness, efficiency, coherence and EU added value of the EU agricultural promotion policy and understand experiences with various aspects of its implementation from internal and external stakeholders. The table below provides a summary of interviewees.

Table 8 Overview of in-depth interviews carried out and scheduled⁹⁰

	Interviews conducted
EU Institutions	12 ⁹¹
External evaluators	3
EU wide agri organisations	4
Non-governmental organizations	1
TOTAL	20

Operational challenges faced:

- **Unwillingness to participate:** The evaluation team faced challenges when reaching out to some intended interviewees from all four categories. An unwillingness to participate in interviews was found across all categories. In total, nine interviewees declined the request for interview, while eleven did not respond

⁹⁰ In addition, two targeted interviewees provided some partial information through email or a short call and are not included in the table as they were not considered "full interviews" and an interview was conducted by DG AGRI on behalf of the evaluation team with DG Environment and notes shared.

⁹¹ Directorates General for Agriculture and Rural Development; International Cooperation and Development; Health and Food Safety (two interviews); Internal Market, Industry, Entrepreneurship and SMEs; Maritime Affairs and Fisheries (two interviews), Trade; Climate Action; Communication and the executive agency CHAFEA.

to the interview request, even after sending numerous reminders and making follow-up calls. European consumer organisations demonstrated a particularly low response rate.

- **Inability to respond to issues:** When interviewees were reached, they were not always able to respond to the topics for discussion in full. For example, interviews with other DGs which are not directly involved in the promotion activities of DG AGRI. They are either sometimes consulted (e.g. asked to provide comments on the annual work programme) or broadly aware of the activities, but not directly involved. Also, they do not have contact with proposing organisations or National Authorities. Therefore, they did not feel in a position to comment on questions relating to the application process, observed impacts or even the Commissions own activities – only DG SANTE (Health and Food Safety) was actually aware of such activities.

Online surveys

The online surveys targeting national competent authorities and Proposing Organisations (POs) and Implementing bodies (IBs) were active for a period of six weeks, from 28 October to 6 December and were exceptionally extended to allow national competent authorities to provide responses until end December 2019. The complete survey analysis is presented in Annex C.

Operational challenges faced:

Initially low response rate: The initial response rate for both online surveys was low, which is why a reminder mail was sent to encourage participation and the deadline for responding to the online survey targeting national competent authorities was extended.

Case studies

The six case studies are found in Annex D to this report. All proposing organisations, national competent authorities and other stakeholders identified as targets for the relevant promotion campaigns were contacted for interview. The evaluation team sent several rounds of email reminders and follow-up phone calls to stakeholders in order to reach between 10 to 15 interviews per case study. As summarised in the table below, a total of 77 interviews were carried out as part of the case studies.⁹²

The evaluation team also requested programme documentation to national authorities and proposing organisations to review it as part of the case studies. Most of them sent the relevant documentation (when available).

⁹² These interview totals are based on number of interviews per case study. However, as some NAs were responsible for multiple programmes across case studies and were therefore effectively interviewed “twice”, there is some duplication in the number of NAs interviewed. The Italian Ministry of Agricultural, Food, and Forestry Policies (Ministero delle politiche agricole, alimentari, e forestali) as well as the Italian Agency for Disbursements in Agriculture (Agenzia per le erogazioni in Agricoltura) were interviewed for Alcohol – US, Dairy – China, and Quality case studies. The Spanish Ministry of Agriculture, Fisheries, and Food (Ministerio de Agricultura, Pesca y Alimentación) was interviewed for Quality and Meat case studies. The French Ministry of Agriculture and Food (Ministère de l'Agriculture et de l'Alimentation) was interviewed for Fruit – UAE and Meat case studies.

Table 9 Overview of case study interviews carried out

Case study				
Stakeholder type	PO	NA	Other	TOTAL
Alcohol – US	5	4	6	16
Dairy – China	4	2	5	11
Fruit – UAE	4	2	5	11
Quality	6	4	5	15
Meat	5	5	3	13
Fruit & Veg	5	5	1	11
TOTAL	29	22	25	77

Operational challenges faced:

The following challenges were faced in carrying out the **data collection** for the case studies:

- **Sharing of documents:** General Data Protection Regulation (GDPR) concerns were raised by some respondents. This was exacerbated by the letter of recommendation, which did not list the sub-contractors and therefore was not viewed by participants as a guarantee that they are being approached by legitimate members of the research team. An updated letter of recommendation was provided. These concerns meant some stakeholders did not feel able to share potentially sensitive data with a third party; POs and other respondents from one country, in particular, raised fears of fraud. The request that initial contacts be made by the national competent authorities, DG AGRI, or CHAFEA confirmed they would be contacted by a third party was not practicable given the timeframes of the study and the difficulties in securing responses from the national competent authorities. This challenge delayed data collection.
- **Interviews national competent authorities:** In some cases, national competent authorities claimed to have no knowledge of the specific content of the programmes, or to have been only marginally involved in the candidate selection process. As such, some national competent authorities suggested that other officials should be interviewed within the same national competent authority or in other government agencies as they would be more knowledgeable. This led to delays in securing interviews with national stakeholders. The type of documents available differed across countries although the structure of the documents was comparable. In particular, interim reports were not available for all projects or were provided in a form which was inaccessible (e.g. interim report provided for one project in Case Study 1 - wine and spirits in USA were scans of photocopies, rendering them hard to read). A number of reports were not provided for the projects covered by Case Study 2 – dairy products in China.
- **Limited data on market share:** The review of market share data was limited to the third country case studies, as these focused on a specific product type in

combination with a specific target market (i.e. the US, China and the UAE). Although data on sales and exports are generally available, data on the market share of specific EU agricultural products in the case study target markets proved difficult to access as these are generally produced and sold by market research companies. As a result, limited information on market shares is reported in the case study reports, as well as section 4.2.5 on the effectiveness of the policy in achieving Specific Objective 4.

- **Limited data on results and impacts:** Limited data was available on the impact of measures as campaigns are still ongoing. Most stakeholders interviewed for the case study expressed a limited understanding of the promotion measures' impact. This was exacerbated by a lack of quantitative data.

ANNEX 4: RESULTS OF THE CALLS FOR PROPOSALS

In the context of the actual promotion policy, CHAFEA published two calls per year from 2016 to 2020 and two additional calls mid-2020 under the specific objective to restore normal market conditions. Hereafter, the detailed analysis of those calls:

In **2016** — CHAFEA received 226 proposals (199 for simple and 27 for multi programmes) following the publication of the calls for proposals⁹³.

The highest number of proposals under the call for proposals for simple programmes were submitted by organisations from Italy and Greece. No proposals were received from Luxemburg, Malta and Sweden.

After the reallocation of unused budget in line with the annual work programme and reallocation of the budget allocated for serious market disturbance, in accordance with the rules announced in the annual work programme, a total of 60 simple programmes and 6 multi programmes were selected.

Simple programme proposals from 16 Member States were approved. The largest number of beneficiaries were from Italy (10), followed by eight beneficiaries from France and eight from Greece. No proposals were accepted from applicants in nine Member States (Bulgaria, Cyprus, Czech Republic, Estonia, Finland, Hungary, Romania, Slovakia and United Kingdom). 25% of the budget was allocated to selected programmes from Italy, 17.4% for the Greek programmes and 9.6% for the French programmes.

14 programmes promoted 'Fruit and vegetables' absorbing 30.1% of the budget, while mixed products (13 programmes) received almost a quarter of the available budget. Meat and meat preparations (12 programmes) account for 17.1% of the budget, followed by dairy products: seven proposals with 14.8% of the budget. Multi programme proposed by the United Kingdom and Denmark promoting organic production took half of the available budget.

Following the publication of the **2017** calls for proposals⁹⁴, 189 proposals for simple and 35 proposals for multi programmes were submitted.

The highest number of proposals for simple programmes was submitted by organisations from Italy, Greece and France. No proposals were received from Estonia, Finland, Luxemburg, Malta and Slovakia.

The meat and dairy sectors were strongly represented due to the specific topics in the annual work programme (42.1% of the total requested funding); 'mixed products'

⁹³ 2016 Call for proposals — Simple programmes — Information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries in accordance with Regulation (EU) No 1144/2014 (OJ C 41, 4.2.2016, p. 4–19) and 2016 Call for proposals — Multi programmes — Grants to Information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries in accordance with Regulation (EU) No 1144/2014 (OJ C 41, 4.2.2016, p. 20–32).

⁹⁴ 2017 Call for proposals — Simple and Multi programmes — Grants to information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries in accordance with Regulation (EU) No 1144/2014 of the European Parliament and of the Council (OJ C 9, 12.1.2017, p. 7–22 and OJ C 9, 12.1.2017, p. 23–37).

proposals were also numerous due to the required basket approach for wine (around 20% of the requested funding).

After the reallocation of the budget for actions in case of serious market disturbance and the reallocation of unused budget in line with the annual work programme, 53⁹⁵ simple programmes and 10⁹⁶ multi programmes were selected.

Organisations from France received 17 grants (from 23 applications submitted) out of the 53 proposals awarded for simple programmes, in total corresponding to 36% of the budget. 10 grants (16 applications) representing 29% of the budget were awarded to beneficiaries from Spain. While applicants from Italy and Greece submitted the highest number of proposals (36 and 30 respectively), they received four grants each. Beneficiaries from France were the coordinators of half of the selected multi programmes.

The highest share of the budget for the simple programmes (23.1%) was allocated to 10 programmes which promote the 'basket of products' approach. It was followed closely by dairy products with nine programmes and 22.1% of the budget. Three programmes targeted olive oil and received 16.5% of the budget, 13.1% was allocated to the promotion of fruit and vegetables (eight programmes). Almost 19% of the budget was allocated for promotion of fruit and vegetables by multi programmes, while multi programme promoting sheep and goat meat received 18% of the budget.

For the **2018** promotion, CHAFEA received 182 proposals (146 for simple, 36 for multi) following the publication of the calls.⁹⁷ The highest number of proposals for simple programmes was submitted by organisations from Italy, France and Greece. No applications were received from Austria, Estonia, Slovakia, Malta, Sweden, Luxembourg, Croatia and Hungary.

Proposals to promote fruit and vegetables requested 27% of the available budget, meat and meat products 17% and dairy products 14%, in total they amount to 58% the EU contribution. 'Mixed products' proposals were also numerous due to the required basket approach for wine (28% of the budget).

After the reallocation of the budget for actions in case of serious market disturbance and the reallocation of unused budget in line with the annual work programme, 58 proposals for simple programmes were approved.

Italian organisations have received 18 grants out of 58 grants in total (and out of 31 proposals submitted by Italian organisations) corresponding to 35% of the budget. Applicants from France have received 11 grants (20 applications) with almost 14% of the budget. Third in terms of the number of selected programmes and share of EU contribution would be applicants from Greece, with applicants from Spain in fourth place. Applicants from Germany, Finland, Latvia and Slovenia did not get any grant approval.

The fruit and vegetables sector with 17 applications received 31.2% of the budget, meat and meat preparation 22.7% (12 grants), cheese and dairy products 19.5% (13 grants) and

⁹⁵ Grant agreement for one approved programme has not been signed thus allowing to grant the first two programme proposals from the reserve list in Annex II to Commission Implementing Decision C(2017) 6934.

⁹⁶ Allocation of additional budget allowed funding an additional proposal from the reserve list.

⁹⁷ OJ C 9, 12.1.2018, p. 15–31 and p. 32–49.

basket of products 19.2% of the available budget (10 grants). The four sectors account for the majority of the programmes evaluated to receive a grant and account for the lion's share of the available budget.

21 proposals for multi programmes were awarded a grant, 15 of them targeting the internal market. Beneficiaries from France and Italy are the coordinators of four programmes each; organisations from Belgium and Greece are each coordinators for three of the selected multi programmes.

Wine, cider and vinegar programmes accounted for 26% of the budget, cheese and dairy products 21% while basket of products and fruit and vegetables received 18% of the available budget.

In **2019**, a total of 144 programmes were submitted, 109 simple and 35 multi. The highest number of submitted proposals of simple programmes came from Italy, France and Greece. No applications were received from Bulgaria, Croatia, Cyprus, Estonia, Hungary, Luxembourg, Malta, Slovakia, and Sweden.

After the reallocation of unused budget in line with the annual work programme and reallocation of the budget allocated for serious market disturbance, a total of 56 simple and 25 multi programmes were selected.

Proposals from 14 Member States were approved. The largest number of beneficiaries were from Italy (17 programmes), Greece (8), Belgium, France and Spain (6 programmes for each of those countries). No proposals were accepted from Austria, Czech Republic, Portugal and Romania. The fruits and vegetable sector received 23% of the budget allocated to simple programmes, the basket of products 21% and meat 20%.

In **2020**, a total of 178 proposals were submitted, 129 simple programmes and 49 multi programmes, almost 30% more than 2019, due mainly to the extended submission (two additional months).

The highest number of submitted proposals came from France, Greece, Italy and Spain. No applications were received from Estonia, Luxembourg and Malta.

In response to the COVID-19 crisis, two additional calls for proposals have been opened on in July 2020. 33 proposals simple and 8 multi proposals were submitted.

Evaluation will run until end of September 2020.

ANNEX 5: FOCUS ON THIRD COUNTRIES

Table 10 Number of funded programmes by type of measures and market targeted between 2016-2019 (excluding abandoned programmes)

	2016		2017		2018		2019		TOTAL	
	EU	Non-EU	EU	Non-EU	EU	Non-EU	EU	Non-EU	EU	Non-EU
Simple programmes	23	35	21	31	16	38	13	43	73	147
Multi programmes	4	2	9	1	15	5	13	12	39	20
Total amount	27	37	30	32	31	43	26	55	112	167

Source: Data on simple and multi programmes provided by DG AGRI in August 2019 and CHAFEA statistics.

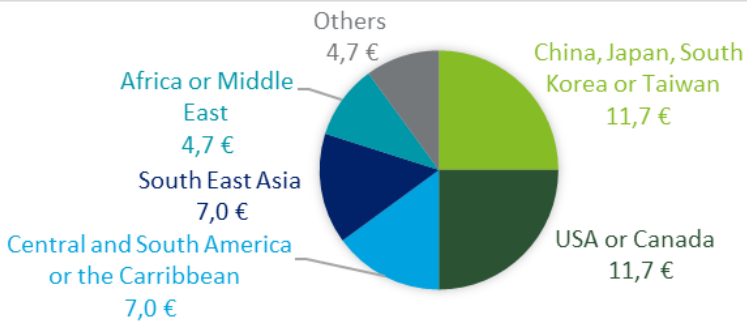
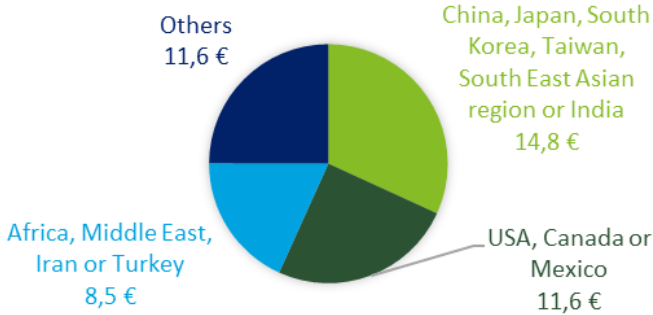
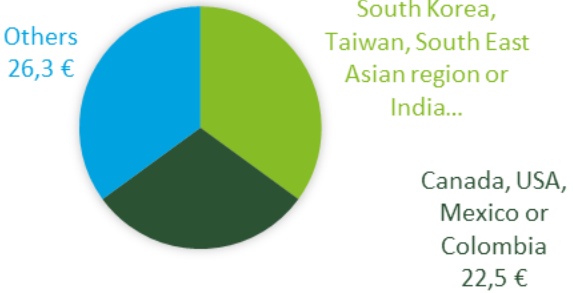
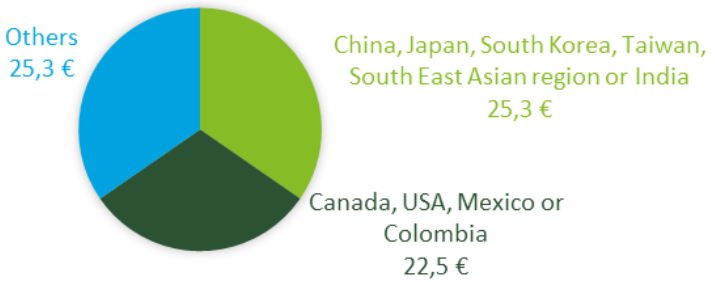
The table below shows that in 2016 most of the budget was allocated to third country markets. The trend was reversed in 2017, with only 41% of the budget targeting the third country markets. 2018 was the most balanced year in this respect with 53% of the budgets of approved simple and multi programmes targeting third country markets.

Table 11 Max grant amount in million euro for approved SPs and MPs targeting internal market and third countries markets in 2016, 2017, 2018 and 2019 (excluding abandoned programmes)

	2016			2017			2018			2019		
	EUR	%	N	EUR	%	N	EUR	%	N	EUR	%	N
Internal Market	32	29%	26	80	59%	30	79	47%	31	61	35%	26
Third countries	75	71%	38	55	41%	32	87	53%	43	112	65%	55
Total grants approved	107	100%	64	134	100%	62	166	100%	74	173 6	100%	81

Source: Data on simple and multi programmes provided by DG AGRI in August 2019 and CHAFEA statistics

Table 12 Geographic priorities and their earmarked budget (2016-2019)

Areas/ Countries	Million EUR allocated														
2016															
 <table border="1"> <thead> <tr> <th>Area/Country</th> <th>Million EUR allocated</th> </tr> </thead> <tbody> <tr> <td>China, Japan, South Korea or Taiwan</td> <td>11,7 €</td> </tr> <tr> <td>USA or Canada</td> <td>11,7 €</td> </tr> <tr> <td>Central and South America or the Caribbean</td> <td>7,0 €</td> </tr> <tr> <td>South East Asia</td> <td>7,0 €</td> </tr> <tr> <td>Africa or Middle East</td> <td>4,7 €</td> </tr> <tr> <td>Others</td> <td>4,7 €</td> </tr> </tbody> </table>		Area/Country	Million EUR allocated	China, Japan, South Korea or Taiwan	11,7 €	USA or Canada	11,7 €	Central and South America or the Caribbean	7,0 €	South East Asia	7,0 €	Africa or Middle East	4,7 €	Others	4,7 €
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Others	25,3 €														
Canada, USA, Mexico or Colombia	22,5 €														

Source: Annual work programme for 2016 -2019

ANNEX 6: LIST OF ACTIONS ON THE INITIATIVE OF THE COMMISSION

High level missions

Since the entry into force of the Regulation, the Commission implemented the following promotion actions on its own initiative:

- High Level Mission to Colombia and Mexico (38 business representatives from 14 Member States), 7-12 February 2016;
- High Level Mission to China and Japan (62 business delegates from 15 Member States), 16-24 April 2016;
- High Level Mission to Vietnam (42 participants), Singapore (36 participants) and Indonesia (38 participants), from 16 Member States, 2-9 November 2016;
- High Level Mission to Canada (59 participants from 22 Member States), 30 April – 3 May 2017;
- High Level Mission to Iran (42 participants) and Saudi Arabia (44 participants), from 18 Member States, 7-13 November 2017;
- High Level Mission to China (65 business delegates from 23 Member States), 14-19 May 2018;
- High Level Mission to the UAE (37 business delegates from 17 Member States, 16-19 February 2019;
- High Level Mission to Japan (60 business delegates from 22 Member States), 8-11 May 2019.

EU pavilions at major international fairs

- EU Pavilion at SIAL Canada in Toronto, 2-4 May 2017;
- EU Pavilion at SIAL Middle East, 12-14 December 2017;
- EU Pavilion at SIAL China, 16-18 May 2018;
- EU Pavilion at China International Import Expo, 5-10 November 2018;
- EU Pavilion at Gulfood Dubai, 17-21 February 2019;
- EU Pavilion at ANTAD Alimentaria Mexico, 5-7 March 2019;
- EU Pavilion at Foodex Tokyo, 5-8 March 2019.

SPS seminars

So far, the Commission organised seminars in

- Korea on 20-21 March 2018;
- Iran on 19-20 November 2018;
- Mexico on 9-10 July 2019;
- Singapore (on GIs only) on 16 July 2019;
- India on 10-11 October 2019;
- Colombia on 12-13 December 2019.

Communication campaigns

Campaigns implemented or ongoing (to date) include:

- Canada 2019-2020
- GCC region 2019-2021
- Japan 2019-2020
- China 2019-2021.

Technical support services

There are currently over 1 860 EU agri-food stakeholders who are registered users of the portal. Approximately 1 650 of those registered users also opt to receive monthly newsletters. The portal has a stable number of visits (an average of 5 000 visits per month, which increases up to 8 000 during the calls for proposals' submission period).

Market Entry Handbooks are purpose-designed publications providing specialised market insights on how to export agri-food products for key target markets. They are destined for EU agri-food producers and exporters interested in increasing their share of third country markets, entering new markets or preparing their proposals for simple or multi promotion programmes. Market Entry Handbooks published so far include: Singapore, Vietnam, Colombia, India, South Korea, Egypt, Mexico, Japan, UAE, China, Saudi Arabia, Iran, Canada, Indonesia. They are downloaded between 40 and 200 times a year.

45 webinars are currently available on the portal, covering topics related to submission or agri-food exports. On average, around 60 participants take part in the webinars and they are subsequently viewed 50-100 times per month.

During the call submission period, from January to April each year, CHAFEA's helpdesk replies to email questions concerning the call conditions. With the start of the implementation by CHAFEA in 2016, 314 requests were received; then in 2018, CHAFEA received 200 emails with 272 questions. The average time for sending out a reply is 1.8 working days. Frequently asked questions are also available on the portal, featuring weekly updates during the proposals' submission period.

Each year evaluation questionnaires were sent out to the applicants following the closure of the call in order to seek advice on potential areas for improvement. E.g., in 2018, 22% of the applicants provided feedback. 79% of respondents were satisfied with the electronic submission, 76% considered that the evaluation criteria were clearly explained. The vast majority (86%) of the calls documents provided were considered useful or very useful.

CHAFEA actively contributed to the communication on the promotion policy by organising an Info Day each year in Brussels⁹⁸ (176 participants in 2016, 230 in 2017, 230 in 2018, 172 in 2019 and 257 in 2020). Web-streaming sessions were also organised with an average participation of 150 - 450 attendees; and on site match-makings meetings with an annual average participation between 30 and 60 people.

More than 50 Info days were also organised by Member States, each of them attended by 20-90 participants.⁹⁹

⁹⁸ <https://ec.europa.eu/CHAFEA/agri/newsroom-and-events/events>

⁹⁹ <https://ec.europa.eu/CHAFEA/agri/newsroom-and-events/events/info-days-member-states-calls-proposals-2018>

ANNEX 7: SUPPLEMENTARY INFORMATION

Table 13 Overview of budget, estimated cost per participant and estimated value of media coverage for each event

Event Type	Event	Budget (€)	Est. no. participants	Cost per person (€)	Est. reach and/or value of media coverage (€ or number of articles)
Trade Fair	SIAL CANADA 2017	260 572	15 000 Note: The number refers to the total number of visitors to SIAL Canada 2017.	17	Total reach 2 307 057 19 articles Note: Figures consider both SIAL and the high level missions.
Trade Fair	SIAL Shanghai / CHINA 2018	514 162	10 000	51.42	Total reach 1 157 922 79 articles Note: Figure includes also media coverage of high level missions to China 2018.
Trade Fair	CIIE Shanghai/ CHINA 2018	548 345	800 000 Note: Figure refers to total visitors to the CIIE.	0.69	Total reach 70 000 000 51 news reports (1 print article, 6 stories in video portals, 2 broadcast media reports, 42 reports from news portal)
Trade Fair	GULFOOD Dubai 2019	Approx. 480 000	93 000 Note: Number of participants refers to visitors to the fair.	5	Total reach 7 605 322 54 publications PR value ¹⁰⁰ : €114 002 90
Trade Fair	FOODEX Japan 2019	520 756	7 370 ¹⁰¹	71	Total reach 10 957 878 2 news reports on TV, 6 news reports on newspapers, 19 online news reports, 1 interview with DG Plewa.
Trade Fair	ALIMENTARIA Mexico 2019	529 533	25 000	21	Total reach: 96 069 085 Number of coverage: 55 PR value: €101 820
High level mission	Vietnam / Singapore / Indonesia 2016	673 923	52	12 960	Vietnam: 109 clippings, PR value €71 698 Singapore:

¹⁰⁰ Equivalent of advertising value.

¹⁰¹ Daily estimate for each of the activities which took place at the stand.

Event Type	Event	Budget (€)	Est. no. participants	Cost per person (€)	Est. reach and/or value of media coverage (€ or number of articles)
					10 clippings, PR value: €58 000 Indonesia: 14 clippings and 1 TV interview PR value: €84 544
High level mission	Canada 2017	298 302	59	5 056	Total reach: 2 307 057 19 publications Note: the number is for the trade fair and high level missions
High level mission	Iran 2017	492 182 (Iran and KSA)	42	11 719 ¹⁰²	44 articles
High level mission	KSA 2017	492 182 (Iran and KSA)	44	11 186 ¹⁰³	11 articles
High level mission	China 2018	539 854	59	9 150	Total reach: 11 575 922 79 articles Note: Figure also includes media coverage of SIAL China 2018.
High level mission	Dubai 2019	278 023	58	4 794	PR value: € 120 469
High level mission	Japan 2019	359 027	63	5 699	N/A
Continuation of promo activities in Japan (tastings)	Japan 2019	1 700 000	62 300	27 29	Total reach: 65 910 ¹⁰⁴ PR value: €983 000

Source: evaluation support study based on data shared by the Commission and CHAFAE

¹⁰² The total budget for high level missions to Iran and KSA has been divided by the total number of unique participants to both missions (32 participants to both missions, 12 only to KSA, 10 only to Iran).

¹⁰³ The total budget for high level missions to Iran and KSA has been divided by the total number of unique participants to each missions (32 participants to both missions, 12 only to KSA, 10 only to Iran so assumed 42 participants to Iran and 44 to KSA) – as we do not know how much of the budget was allocated to each mission, this helps provide a loose estimation of the cost per person but should not be viewed as definitive. Source: Final Technical Report for the High Level Mission to Saudi Arabia and Iran 2017.

¹⁰⁴ Figures take into account combined reach of dedicated advertising on Instagram, Facebook, and media buying.