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*Hindrances local organic farmers are facing in the Turkish
organic agricultural sector*

An attempt to identify barriers and suggest ways to eliminate them

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ABSTRACT

Today, organic agriculture is considered a viable option to close the gap between commonly practiced agriculture and the goal of an economically, environmentally and socially sustainable agriculture. During the last 25 years, Turkey saw a first wave of conversion to organic farming practices, mainly spurred by demand from export markets. Due to exceptional natural conditions, foreign companies settled in the country to establish and supervise production for their home-markets in Europe, America or Japan.

This thesis is aiming for clarity about the hindrances farmers may face on their way from conventional to organic farming in Turkey. In order to gain a thorough picture of the situation for farmers, consumers and other stakeholders in the Turkish organic sector, they were interviewed or asked to complete a questionnaire concerning their view on problems of-, and possible solutions for the organic farmers' situation.

The results of this research show a lack of coordination and trust among stakeholders. The top-down led organic sector is dominated by foreign production- and certification companies. Even though the Turkish Ministry for Agriculture and Rural Affairs is widely respected for its commitment to organic agriculture, the ministry's expertise is put into doubt. Thereby a strong and clear leader for the development of the sector is difficult to pin-point for most actors. Unisonous, the development of the market (both export and domestic) is considered most important, ranked higher than additional governmental support.

In respect to these findings, this thesis finishes with the conclusion that there is an urgent need for a more active grass-root movement. Such, it is reasoned, will help to move the spotlight of focus on the farmers' situation. More than financial support, farmers need functioning support structures to guide them through the challenging conversion period and help with knowledge gathering and marketing.

INDEX

GLOSSARY	4
INTRODUCTION	5
BACKGROUND	6
Farming in Turkey.....	6
Environmental Problems in Turkish Agriculture	7
EU Accession	7
The Link between Sustainable- and Organic Agriculture	8
Organic Farming in Turkey	10
Domestic Consumption of Organic Food.....	14
PROBLEM DESCRIPTION	15
OBJECTIVES	15
THEORY	16
Externalities	16
External Pressure.....	18
Sustainable Agriculture and Rural Development.....	19
ASSUMPTIONS	21
LITERATURE REVIEW	22
METHODOLOGY	23
Workshops and Interviews with Farmers	24
Interviews and Online-Survey with Stakeholders.....	25
Consumer-Survey	25
Kolb’s Learning Cycle.....	27
RESULTS	28
EuropeAid/121154/D/SV/TR.....	28
Problem sources	30
Farmers’ Opinion about Problem Causes	36
The Market as essential Factor.....	37
What the Consumer Survey revealed	38
Possible Solutions.....	40
DISCUSSION	45
Government Institutions	45
The Market.....	48
The Grass-root.....	50
CONCLUSIONS	52
ACKNOWLEDGEMENTS	52
REFERENCES	53
Personal Communications	58
Tables and Figures.....	59

GLOSSARY

AAPT Dept.	Alternative Agricultural Production Techniques Department
AEA	Aegean Exporters Association
BUĞDAY	Association for the Support of Ecological Living
CAP	Common Agricultural Policy
DIS	Direct Income Support
DSI	Public Waterworks Administration
EC	European Commission
ETO	Association for Ecologic Farming Organizations
EU-15	Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxemburg, the Netherlands, Portugal, Spain, Sweden and the United Kingdom
EU-25	EU-15 + Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia
EU-27	EU-25 + Bulgaria and Rumania
IFOAM	International Federation of Organic Agriculture Movements
IPARD	Instrument for Pre-Accession Assistance-Rural Development
IUCN	International Union for Conservation of Nature
MARA	Ministry of Agriculture and Rural Affairs
NAP	National Action Plan (= TOFFAP)
OA	Organic Agriculture
ORGÜDER	Organic Product Producers and Industrialists Association
OTK	Organic Agriculture Committee
OTYK	Organic Agriculture National Orientation Committee
RD	Rural Development
TaTuTa	Eco-Agro Tourism and Voluntary Exchange
TOFFAP	Turkey Organic Food and Farming Action Plan
TURKSTAT	Turkish Statistical Institute
TURKAK	Turkish Accreditation Agency
WWOOF	World Wide Opportunities on Organic Farms

INTRODUCTION

Presently, there are 71.5 million people living in Turkey. With 779,452 km² Turkey is bigger than any EU member-state. Its' size equals about 20% of the EU-25's surface. At the same time it is, in economical terms, among the poorest countries in Europe; however industrializing at a rapid pace. The yearly income per capita of 5 500 EUR is the lowest among the new EU Member States and EU Candidate Countries. Turkey's share in GDP of the EU-28 only augments to 4%. The current income per capita (at Purchasing Power Standard¹) only reaches 23% of the EU-15 (EC Directorate-General for Agriculture, 2003; Eraslan, 2004).

In agricultural terms, Turkey is a global player. Its agricultural sector is among the biggest in Europe, providing employment for 33 % of the country's total active workforce. This share is considerably above the European average (EC, 2006). Starting with the foundation of the republic, but especially since industrialisation gained momentum in Turkey, intensive intra-regional migration towards the western urban parts of the country has created both infrastructural and social problems.

Turkish agriculture can be described as mainly subsistence or semi-subsistence, small-scale farming, which is subject to very low productivity, high hidden unemployment and low competitiveness (ibid.). At the same time current agricultural practices are causing environmental problems. Among the most alarming environmental threats are biodiversity loss and desertification.

While the way farming is widely practiced today has far reaching consequences for the working and natural environment, and is one of the main causes of environmental stress in the world, frequently causing damaging, excessive suffering to farm animals and being highly unsustainable (EEB, www), organic farming practices are often seen as a possible way out of conventional farming's dilemma. Many experts agree upon the great potential for organic farming in Turkey, which is motivated by a favourable climate (seven climatically different regions (Güler, 2006)), unpolluted soils (Özbilge, 2007), the country's proximity to the EU, an – until today – modest use of agro-chemicals in most parts of the country, as well as the use of traditional practices in agriculture (Gubbuk et al., 2004). The oversupply of young workforce in rural parts, combined with additional workload in organic farming is also mentioned as “fitting” (Eraslan, 2004). According to Kenanoglu & Karahan (2002) and Özbilge (2007) the dissemination and development of organic agriculture (OA) is therefore believed to be an important tool for increasing the incomes of the agricultural producers and decrease migration to urban areas, as organic farming requires significantly greater labour input (Rehber & Turhan, 2002).

Nevertheless, and despite of EU-requests, Turkey is missing a comprehensive rural development (RD) strategy (Commission of the European Communities, 2004b). Given the necessity to comply with EU-policies and –law in case of a possible future membership, Turkey must take into consideration the increasing recognition of the advantages of organic farming by the European Union. Since the recognition of organic farming in its strategy on environmental integration and sustainable development in the EU's Common Agricultural Policy (CAP) in 1999, and the publishing in 2004 of the *European Action Plan for Organic Food and Farming* that intends to provide conditions allowing organic farming in the EU and

¹ The PPS is a EUROSTAT definition for an artificial currency unit that has the same purchasing power over the whole of the EU 27. As such it reflects the weighted average of the price levels of Member States. (Eurostat, OECD, 2007)

internationally to develop, the growing importance of the organic sector is undeniable (Commission of the European Union, 2004a). If Turkey wants to join the EU, it has to adapt its administrative and judicial system concerning agriculture and the environment to the EU *acquis communautaire*, and fulfil the Copenhagen criteria (SIDA, 2008).

Even though the Turkish government has made great advances in terms of support for OA, the level of state recognition and financial support, compared to European standards, is insufficient (Eraslan, 2004; Güler, 2006; Kenanoglu & Karahan, 2002; Özbilge, 2007; Rehber & Turhan, 2002; Süngü, 2004). In contrast to conventional farming, the prices of organic products depend exclusively on market conditions. This means that there are no price interventions (Süngü, 2004), as seen in conventional food production, where the '*Turkish Grain Board*' carries out intervention purchases and keeps emergency stocks in order to prevent cereal prices from fluctuation (EC, 2006; EC Directorate-General for Agriculture, 2003).

Turkey has so far failed to provide a sufficient level of support for OA. This must be regarded as problematic in the light of the low share of organic farming in Turkey and only few farmers willing or able to convert to organic farming methods. (Mehmetoglu, 2007; Rehber & Turhan, 2002).

In the following, all issues mentioned in this first paragraph will be discussed in detail (Background). Then, the reader shall be informed why this thesis is of relevance (Problem Description), and its' aim (Objectives). To put the topic into context, relevant theories will be discussed, as well as other researchers' findings (Theory & Literature Review). In 'Methodology' the reader should get an impression of how the research for this thesis was conducted. Finally, results are presented, discussed and relevant conclusions drawn (Results, Discussion, Conclusions).

BACKGROUND

Farming in Turkey

In Turkey, three million farmers have 27 million hectares under cultivation, equivalent to 20 % of the EU-25's agricultural land and more than any Western European country (Eraslan, 2004). The country is self-sufficient in food production and even generates considerable surpluses for export markets (EC, 2006); primarily the European Union, the United States and Japan. As for most developing countries, the importance of the agricultural sector in Turkey is considerable, but declining. While in 1980, agriculture constituted 20 % of the GDP, its share almost halved to 11 % in 2002 (EC, 2006; EC Directorate-General for Agriculture, 2003). This trend is also reflecting in the rural-urban migration. The currently 71.5 million inhabitants live to 66 % in urban areas, while in the 1970s 61.5 % still lived in the countryside. Similarly the total number of Turkish agricultural holdings decreased by 25 % between 1991-2001 (EC Directorate-General for Agriculture, 2003). In rural areas, about 67.5 % of the labour force is employed in agriculture (EC Directorate-General for Agriculture, 2003). As with most countries that are industrializing at a rapid rate, the living conditions for subsistence and semi-subsistence farmers in the countryside are considerably lower than in the urban parts of the country. Major challenges in RD in Turkey are a poor level of education and skills, insufficient infrastructure, a high rate of dependency on agriculture (insufficient diversification), hidden unemployment and low income levels. Often, family members provide most of the labour, and investment-potential is a limiting factor. Subsistence and semi-subsistence farms are difficult to reach with traditional market and price

policies, because they only market a minor part of their production, and do so within a limited regional scope. (EC Directorate-General for Agriculture, 2003)

With an average farm size of only 6 ha (Hauer & Bauer, pers. comm.), Turkey's agriculture is considerably smaller structured than in the EU-27, where the average farm size is 12 ha (Landbruksrådet, 2008). One third of all Turkish farms cultivate no more than 2 ha, and more than 80 % cultivate areas smaller than the EU-27 average (Table 1).

Table 1: Farm size distribution in Turkish agriculture (in % of total farms)

Farm size (in ha)	1991	2001
0-2	35.8	33.4
2-5	31.0	31.5
5-10	17.8	18.5
10-20	9.8	10.8
20-50	4.6	5.1
above 50	0.9	0.7

Source: EC, 2006 (modified)

According to the 1991-census, agricultural holdings are to a great share mixed cropping-livestock holdings (25.6 %), followed by field cropping- (22.9 %), grazing livestock- (20.9 %) and permanent crops holdings (13.2 %) (EC Directorate-General for Agriculture, 2003). The coexistence of market oriented and subsistence agriculture poses a political and economic challenge for the competitiveness of Turkish agriculture and the food industry (EC Directorate-General for Agriculture, 2003).

Environmental Problems in Turkish Agriculture

In the long run biodiversity loss, land erosion, land degradation, and desertification are threatening Turkish agriculture. Slopes of more than 15 % cover 2/3's of the country, and almost half of the total landmass is sloped steeper than 40 %. Due to these topographic conditions, 59 % of agricultural lands are exposed to erosion. With nearly all agriculturally suitable land already used (Hüttheroth & Höhfeld, 2002), agricultural land has in the past even been established where conditions were unsuitable for intensive production. Among the reasons for biodiversity loss and excessive erosion in Turkey are specialisation, harmonisation and homogenisation of agricultural land, overgrazing in rangelands, improper agricultural techniques, excessive use of manure and pesticides, rural poverty and the lack of training (Cromwell et al., 2000; Turkish Ministry of Environment and Forestry, 2007). Taking into consideration that soil erosion leads to irreversible loss of productivity, Turkey must make a serious effort towards conservation of topsoil layers (Ozturk, 2002).

A failure to implement appropriate technologies, as well as poverty- and land use policies will first and foremost affect the poor. As food security and environmental stability are strongly interlinked, subsistence farmers could be hit hard by productivity-losses. Similarly, addressing poverty is a prerequisite for addressing desertification and biodiversity loss. There is consequently an urgent need to encourage sustainable land use and management and improve understanding and knowledge of the poorly known threats coming from erosion and biodiversity loss among the general public (Eswaran & Reich, undated).

EU Accession

In 1963 Turkey and the European Economic Community (EEC) signed the Ankara Association Agreement for the progressive establishment of a customs union. Since 1999,

Turkey furthermore has official candidate country status for EU membership (EC, www). It is since trying to harmonize the Turkish agricultural policy with the EU CAP. Historically, the Turkish state heavily subsidized and intervened with the agricultural sector (Eraslan, 2004). Even though policy changes have taken place, the EU Commission attests Turkey only a low level of alignment in respect to chapter 11 'Agriculture & Rural Development'.

The EU criticises the current institutional structure in and around the Ministry for Agriculture and Rural Affairs (MARA) as inefficient and in need to be harmonized and aligned with the EU. The enforcement and execution of laws, regulations, fiscal and other measures are said to be badly coordinated and in some cases conflicting, and the MARA is lacking a number of necessary organisational units (such as an appropriate Paying Agency and an Integrated Administration and Control System). Furthermore, official statistics are very limited (Okumus, 2002; Özbilge, 2007). Concerning the environment, the public lacks sufficient information and will to participate, and farmers lack incentives to conserve land and water resources. In respect to market orientation, the Turkish legislation is admonished because of its most recent backing away from already started reforms towards the restructuring of the agricultural sector (EC, 2006; EC Directorate-General for Agriculture, 2003; Okumus, 2002). Support instruments coupled to production continue to be implemented and thereby differ substantially from the current trend of the reformed CAP (Commission of the European Communities, 2007a,b; Commission of the European Communities, 2008).

According to the Commission of the European Union, attaining a sustainable share of the population deriving its livelihood from agriculture, mitigating the effects of rapid urbanisation and improving the protection of the environment are all desirable goals of the modernisation and restructuring of the Turkish agricultural sector, but meeting the EU's environmental norms will constitute one of the most expensive aspects of Turkey's EU integration efforts (ibid.).

In contrast to Turkey's overall agricultural policy, progress in the field of OA represents one of the most complete areas of harmonisation across all policy areas (Stopes, 2007). The European Commission (EC) acknowledges considerable improvements in respect to RD and OA through the implementation of the Turkish Rural Development Programme for 2007-2013, prepared under the Instrument for Pre-Accession Assistance-Rural Development (IPARD)-Plan of the European Union (ibid.). The country gets credit for having comparable registration, certification, control and infringement systems with the EU and, in 2004, joined the *European Information System for Organic Market* (EISfOM) (EC, 2006). Also, alike in the EU, certifying companies evaluate the producers' compliance with the Turkish organic regulation and product samples are collected at least twice a year, along with random visits during the vegetation cycle (Gubbuk et al., 2004). Yet, Turkey has not managed to be included into the 3rd countries list of the EU, which would facilitate Turkish exports of organic production to the EU.

The Link between Sustainable- and Organic Agriculture

The notion of sustainable agriculture derives, of course, from the broader concept of sustainable development, adapted to the context of farming:

"Sustainable Development is the management and conservation of the natural resource base, and the orientation of technological and institutional change in such a manner as to ensure the attainment and continued satisfaction of human needs for present and future generations. Such sustainable development (in the agriculture, forestry, and fisheries sectors) conserves land, water, plant and animal genetic resources, is environmentally non-degrading, technically appropriate, economically viable and socially acceptable." (FAO, 1995)

Another definition that caught my attention is the following:

“To most people, [sustainable agriculture] seems to mean an agriculture that will continue to conserve natural resources and protect the environment indefinitely, enhance the health and safety of the public, and produce adequate quantities of food at a profit for farmers. Others extend the concept to include goals such as social justice and the safeguarding of animal welfare. However defined, a sustainable agriculture is generally regarded as an alternative to modern industrialized, or conventional agriculture, an agriculture described as highly specialized and capital intensive, heavily dependent upon synthetic chemicals and other off-farm inputs.” (Schaller, 1993:89f)

Duesterhaus (USDA, 1990) suggests that sustainable farming must be resource conserving, socially supportive, commercially competitive, and environmentally sound. According to Bergquist (2008) sustainability means mimicking the processes of nature; and Eksvärd & Gibbon (2004) describe sustainability as the integration of all factors into one all-embracing picture of reality, where various effects and consequences have to be weighted against each other. In consequence, increased efforts are needed to educate farmers in agricultural methods compatible with the environment (EC, 1999).

The EU states that OA significantly contributes to a number of community policies concerning sustainability. Therefore all Member States have agreed upon further growth of organic farming as being desirable (EC, 2004). The *Ekologiskt Forum*², a government associated organisation in Sweden, describes organic farming as to seek environmental awareness, resource conservation and a high degree of self-sufficiency. Thereby it is believed to contribute to reach 6 out of the 16 officially declared Swedish environmental goals (Ekologiskt Forum, 2007). The Austrian Ministry for Agriculture, Forestry, Environment and Water Management (*BMLFUW*, a.k.a. *Lebensministerium*) perceives organic farming as the most environmentally friendly of all agricultures (BMLFUW, www). In the *Framework Convention on Climate Change*, the United Nations (2006) describe organic farming as one of several effective instruments for success. Understandably, the International Federation of Organic Agriculture Movements (IFOAM; organic farming’s global umbrella organisation), ascribes OA a pioneering function, providing innovations and examples of sustainable practices to the whole agricultural sector (IFOAM EU Regional Group, 2002). And for the Turkish government, Mehdi Eker, the Turkish Minister for Agriculture, published the following statement:

“The Turkish government believes that organic farming offers a significant opportunity for producers in Turkey, particularly when viewed in light of the need to reduce pollution of water, protect the soil and reduce the emission of greenhouse gases. A strong organic sector also has the potential to contribute to rural development and to healthy local economies.” (Bagatur et al., 2007:4)

From the scientific community Eksvärd & Gibbon (2004) give it credit for recognising that each and every farm has a unique production system that involves highly complex, and partly unknown or poorly understood, interactions. According to Hole et al. (2005), organic farming can provide higher levels of biodiversity, and thereby help to achieve a balance between agricultural activity and the preservation of biological diversity. Reganold et al. (1987) found in a long-term study since 1948 that organic practices resulted in significantly

² For more information (in Swedish) see http://www.ksla.se/sv/redirect_frameset.asp?p=460&time=21392 (2009-06-02)

higher organic matter, thicker topsoil, higher polysaccharide content, lower modulus of rupture and less soil erosion, compared to conventional agriculture. In a separate study (1981-2002), Pimentel et al. (2005) came to similar results. Their findings indicate that the environmental benefits of OA are attributable to reduced chemical inputs, less soil erosion, water conservation, as well as improved soil organic matter and biodiversity in organic systems.

Organic Farming in Turkey

Organic farming in Turkey started in the mid-1980s, exclusively due to demand from importing countries, and here particularly from countries part of the European Union (Güler, 2006). In the beginning, it developed independently of government policies, triggered by demand coming from these foreign markets. Orchestrated by foreign companies, which were interested in organically grown products that couldn't be cultivated in their home countries, were short of supply in their home countries or simply cheaper to produce in Turkey, whole villages converted to organic farming, to then deliver a certain product under the terms of agreement with these project-leading companies. Due to the lack of any national regulations on OA, production of organic food and fibres back then happened according to the legislation of importing countries (USDA Foreign Agricultural Service, 2006),.

Official Turkey took recognition of OA in 1994, when the Turkish National Assembly passed the first by-law on OA³, in line with the EU Regulation 2092/91, and the MARA became 'competent authority'⁴ (Demiryürek, 2008). In the year 2003, the MARA reformed the institutional structure for OA and established a sub-division called '*Alternative Agriculture Techniques and Production Department*' (AATP Dept.). In 2004/05 followed the publication of Turkey's organic farming law⁵. Simultaneously, the MARA established two committees under the AAPT Dept., the '*Organic Agriculture Committee*' (OTK) and the '*Organic Agriculture National Orientation Committee*' (OTYK). Of the two, the OTK is the one with formal responsibilities, including the authorisation and auditing of Control and Certification Institutions, the development and implementation of the legislation, and management and monitoring of entrepreneurs. The OTYK, on the other hand, is more of a stakeholder-forum, with little legislative power, but the assignment to create opinion on the subjects of development and implementation of OA, raising awareness among producers, local and foreign marketing, detecting problems in implementation and developing solutions, creating support projects, determining research priorities, and conveying them to the OTK (Stopes & Ananias, 2006). In 2006, the 'National Organic Strategy for Turkey' was completed. (Stopes, 2007; Stopes, 2007c).

Only recently has the Turkish government started to actively support organic farming. Direct Income Support (DIS) is paid to organic farmers on a per hectare basis (180 YTL/ha (Aksoy, pers. comm.)), and, since 2004, enterprise- and investment loans for organic farms are available with a 60 % discount from the *Turkish Agricultural Bank* (ZIRAAT Bankasi) (EC, 2006; Stopes, 2007). Furthermore, within the framework of the '*Implementation Project of the Agricultural Reform*' and supported by the World Bank, a project was implemented

³ The '*Production, Processing and Marketing of Plant and Animal Products produced by Organic Farming Methods*'-law

⁴The EU demands a 'competent authority' in every country aiming for export to the European market, which is in charge of supervising the implementation of EU-regulation 2092/91 or any other state legislation regarding organic production.

⁵ The '*Principles and Application of Organic Farming*'-law

which brought along additional payments for OA in four environmentally especially sensitive regions over a 3-years limited timeframe, starting in 2006 (Özbilge, 2007).

In support of the organic sector the MARA now undertakes information campaigns to increase awareness and interest in organic production among producers and consumers (EC, 2006). Since the 2004 law for OA, state television must broadcast half an hour of educational and/or promotional programs on the organic sector every month, and the ministry has installed specialists on organic farming in each of the 81 Provincial Agricultural Directorates, through which it conducts educational programs.

Until today, as many as thirteen private certification bodies have been given permission by the MARA to perform controls and give away certificates (Demiryürek et al., 2008). At least three internationally accredited laboratories for pesticide residues have been established in Turkey, and the MARA itself is running a laboratory specialized in OA (not internationally accredited, though) (Aksoy, pers. comm.). So far, no financial support is provided to help farmers, confronted with high certification costs (Güler 2006).

To overcome the shortcomings in statistical data collection in the organic sector, a data collection- and processing system is currently being developed. Until 1996, data was solely collected by the *Association for Ecologic Farming Organizations* (ETO); only then did the MARA start to take over this responsibility. Over time, the MARA has managed to improve the system, and is now following EUROSTAT norms and parameters in data collection. In the future, it is intended to assign the OA-units within the Provincial Agricultural Directorates with the task to collect more precise data, which is so far coming from control and certification bodies, as well as the *Aegean Exporters Association* (AEA) (Süngü, 2004). An EU-funded initiative aims at developing databases for the collection and reporting of data on the sector, and at improving information and communication in the organic sector. Through the development of a codification system, traceability of organic products is being improved, and a training course in database management and reporting was delivered to MARA staff. As a result, the Provincial Directorates should be able to access the collected data immediately. So far, it seems to be a challenge, though, to motivate MARA staff and other stakeholders to enter needed information and keep it up-to-date (Engiz, pers. comm.). It therefore is not uncommon for data from the MARA and the AEA to differ (Demiryürek et al., 2008).

Apart from governmental institutions, several more or less government-affiliated organisations are of importance to the sector. The NGOs *Turkish Association of the Organic Agriculture Movement* (ETO), *Organic Food Producers and Industrialists Association* (ORGÜDER), and the *Aegean Exporters' Association* (AEA) are prominent representatives.

The 1992-founded ETO, counting about 200 members from producers-, processors-, researchers-, certification institutions- and consumers-side, is since its' foundation closely working together with the MARA (Tanrivermis, 2006). Its aim is to define the needs of existing organic farms, set standards for production, inspection, certification and export and stimulate the development of the sector. It provides training and counselling to farmers and serves as a link between dealers and institutions (Eraslan, 2004; Güler, 2006). In Turkey, ETO has since its creation been among the most prominent actors in the organic sector (Rehber & Turhan, 2002). Nevertheless, the organization was criticized for ineffectiveness and for not sufficiently representing the whole sector. Judging from the rather small number of members, it is possible to imagine that it does neither represent the approximately 14 000 organic farmers in Turkey, nor the crowd of consumers, interested in organic products.

Orgüder was founded in 2004, and unites 32 members from the organic food industry. The organisation's goal is to increase cooperation, establish an information exchange network between the organic producers and processors, contribute to the general awareness in civil society and participate in promotional activities. *Orgüder* is member of TGDF (Federation of

Food & Drink Industry Associations of Turkey) and IFOAM (Orgüder, www; Tanrivermis, 2006).

The AEA is a government funded organization, authorized to collect data on all exported organic products, which the exporting companies are obliged to report to the Exporters Unions they are related to (Kenanoglu & Karahan, 2002; Süngü, 2004). Until 1996, the AEA, together with ETO, was alone to collect data on the organic sector in Turkey (Engiz, pers. comm.). Only then a more directly government-administrated system was gradually established. Until today, the AEA coordinates the export of organic products for the whole of Turkey (Güler, 2006) and delivers valuable data on organic production. Unfortunately this data can differ from information collected by the government, and therefore has to be dealt with cautiously.

The only major grass-root organisation in the Turkish organic sector is the *Association for the Support of Ecological Living* (Buğday), which started as a single market stand, selling organic products in the city of Bodrum. Founded in 1990, *Buğday* fastly grew to become a relied-upon stakeholder, explicitly standing on the side of small producers⁶. Among the NGO's activities is the organization of farmers' markets in Istanbul, Antalya, Samsun and Bursa (under the brand name '*% 100 Ekolojik Halk Pazarı*'). Being the first organisation to organise professional farmers' markets exclusively dedicated to organic products, *Buğday* also inspired other actors (private companies, municipalities and ETO) to become active in the establishment of direct distribution channels in different parts of Turkey. *Buğday* campaigns for organic farming and tries to lobby for organic farmers' causes. As the Turkish partner organisation of WWOOF-international⁷, they are in charge of the TaTuTa project⁸. *Buğday* further is a member of IFOAM, the '*Centre for Alternative Technology*' and publishes the newsletter of the '*Global Ecovillage Network*' in Turkey (Tanrivermis, 2006).

The development since the beginning of OA in Turkey in the mid-1980s resulted in a small, but rapidly growing organic sector. Between 1990 and 2006, the number of organic products increased more than 26-fold, the number of farmers 46-fold and the area under organic management 186-fold. Including areas under conversion, 192 789 ha were under organic land management by 2006 (Demiryürek et al., 2008). Presently, about 0.8 % of all arable land is cultivated organically (Güler, 2006); yet almost half of this land is 'wild harvest'-area. The number of farmers engaged in organic production is more than fourteen thousand (Demiryürek et al., 2008).

The epicentre of the organic sector lies in the Aegean region with Izmir as its capital (see Figures 1 and 2), where the entire movement has its foundations. Combining one of the most important Turkish harbours for food exports (Izmir) with very favourable growing-conditions and – compared to the rest of Turkey - a lively NGO-scene, the Aegean-region provided good conditions for the pioneers of organic farming, leading the way for the rest of the country. Even today, 41 % of all organic production happens in the Aegean region (USDA Foreign Agricultural Service, 2006), and the majority of processing companies and control- and certification companies are located there (Kenanoglu & Karahan, 2002).

⁶ For more information see <http://www.bugday.org/eng/>

⁷ WWOOF (World Wide Opportunities on Organic Farms)- is a worldwide network, connecting organic farms with volunteers, seeking an opportunity to work on farms. In return for volunteer help, WWOOF hosts offer food, accommodation and opportunities to learn about organic lifestyles. More on: www.woof.org

⁸ TaTuTa (Eco-Agro Tourism and Voluntary Exchange) is the Turkish equivalent to the worldwide WWOOF organisation, started and managed in Turkey by Buğday Association.



Figure 1: Map of Turkey, highlighting regional subdivision of the country
(Source: Wikimedia Commons, www)



Figure 2: Map of Turkey, highlighting major cities, neighbouring countries and important water bodies.
(Source: EC, www)

The organic sector in Turkey started, and is still largely dominated, by the cultivation of vegetal crops and is small-scaled and fragmented (Kenanoglu & Karahan, 2002; Süngü, 2004). The major product groups are dried fruits, edible nuts, spices and herbs, fresh/processed fruits and vegetables, pulses, cereals, industrial crops and oil seeds (Yücel et al., 2007). Recently, significant investments in organic livestock production have been registered (USDA Foreign Agricultural Service, 2006). Organic production in Turkey is almost entirely dependent on exports (export quota: 95-99 % (Kenanoglu & Karahan, 2002; USDA Foreign Agricultural Service, 2006, Gubbuk et al., 2004)). Today, products are exported to more than 37 countries, among which the EU Countries take the first place (80 %) (Güler, 2006).

Domestic Consumption of Organic Food

Researchers occupied with OA in Turkey and internationally agree upon the importance of domestic markets for growth and lasting success of organic farming and find fault with the lack of the very same in Turkey. Emerging in 1999, the domestic market shows fast annual growth rates in recent years; yet on a negligible level (2001: \$ 3 million sales-volume) (Gubbuk et al., 2004; Schayes, 2001), and being present only in major cities (Eraslan, 2004; Güler 2006). The future prospects for the market are believed to be positive, even though estimates concerning its potential vary. While the USDA Foreign Agricultural Service (2006) expects that there will be a slow but steady growth in domestic consumption, Eraslan (2004) speaks of the Turkish market as a ‘sleeping giant’, on which demand will be triggered by growing incomes, increasing health awareness (Yücel et al., 2007) and better marketing. Rehber & Turhan (2002) even suggest insufficient supply – not lack of demand – will be the main problem in the future. For the time being, consumers largely refrain from organically grown food, mainly due to price-sensitivity (Eraslan, 2004) (only 10 % of the Turkish population can afford to buy organic food at the moment (USDA Foreign Agricultural Service, 2006)).

PROBLEM DESCRIPTION

In Turkey huge transfers to the agricultural sector represent significant welfare costs. Nevertheless, neither social justice, nor environmental sustainability has been achieved. There are a number of arguments pointing at the conclusion that common agricultural policies sooner or later will drive the agrarian sector against a wall. Present policies have led to declining labour- and land productivity (Cakmak, 1998). Hidden unemployment and the depopulation of the countryside, with people moving from villages to urban areas, are the consequence (EC Directorate-General for Agriculture, 2003). It is often claimed that there is a link between poverty and environmental degradation.

Rural poverty is complex; low income, resulting from low productivity, low consumption, inequality in ownership and access to productive assets, poor health and education, degradation of natural resources, vulnerability to risk, and weak political power are all characteristic for it. The poor are most vulnerable to instabilities and degradation of ecosystems. The degradation of resources such as land and forests, and phenomena such as the shortage of fresh water deprive the population of vital development resources. Therefore successful management of natural resources is essential for RD; likewise for the preservation of the environment. Despite their obvious importance, rural areas often tend to be neglected and, so far, problems have been dealt with on an ad-hoc basis (Commission of the European Communities, 2002; Europa.eu, www).

According to the EU-Commission, organic farming can contribute to the income of farmers through market premiums and environmental support payments (Commission of the European Union, 2004a). Taking the effort to promote organic production serious means to actively support the Turkish organic sector. Over the long run, a healthy development of the OA-sector is not possible in a situation of total dependence on export markets, as it counteracts product-diversity, stability and innovation (Özbilge, 2007). At present organic farming in Turkey has to cope with unclear governmental commitment, and compete with subsidized conventional crop production. Thereby productive areas that could otherwise easily be switched into organic production are held in check, and the very price-sensitive consumers refrain from purchasing substantially more expensive organic food (Schayes, 2001). To convince more farmers to take the risk of a conversion to organic practices, durable profitability needs to be ensured. Despite the strong demand from international markets⁹, scepticism among farmers remains strong. Due to considerable risks emerging from the necessity to adapt to different production methods and the time it takes until new practices are understood and incorporated, farmers are certainly well advised to evaluate such a move thoroughly (Jordbruksverket, 2008b). At the moment, inadequate structures and missing support seem to keep farmers from converting to organic methods.

OBJECTIVES

With this paper, I aim to examine the challenges emerging from a conversion to OA for Turkish small-scale farmers. That Turkey has the preconditions for diverse and competitive organic production is without doubt; so is the predicted potential for organic products from Turkey and the fact that organic farming can produce considerable economic, social and environmental benefits.

⁹ It is difficult to say at this point to what extent the economic crisis of 2008/09 will effect markets for organic food in Europe and worldwide, thus international demand for organic produce from Turkey.

By asking where the hindrances for a conversion to organic farming for the average farmer in Turkey lie, I believe to be able to conclude to what extent organic farming in Turkey is sustainable at the moment, and further come up with suggestions how to turn the wheel towards improved profitability for farmers, and the sector in general; thus how to strengthen sustainable RD through OA.

My research question can be pinpointed as follows: *How do farmers, consumers and other stakeholders concerned with the organic sector in Turkey regard the possibilities and challenges for organic farmers in Turkey, and what can be done to guarantee fair profits and decent living conditions for producers engaged in organic production?*

THEORY

Externalities

In economic theory, externalities are a commonly referred to explanation for negative or positive social and environmental effects, emerging from economic activity, but not paid for by the originator. Although externalities can affect almost every part of society and the environment, the fact that agriculture is inherently multifunctional (Pretty et al., 2001) makes it an especially vulnerable sector. Externalities are commonly referred to as costs or benefits arising to the general public that are side effects not covered by contractual arrangements between actors in the market. Thereby they are not part of the prices paid by producers or consumers and the divergence between private and social costs constitutes a market failure.

The theory of externalities is central to the critique of neoclassical market organization, used to explain the loss of social welfare whenever private agents do not take into account the greater social implications of their actions. More complex modern systems and technologies increase the potential for negative externalities burdened upon society as a whole (Dahlman, 1979; Pretty et al., 2001). Pretty et al. (2001) state that externalities in agriculture represent a substantial burden on non-agricultural sectors. Among the widest-ranging and best documented economical and social effects are pesticides contaminating water and harming wildlife and human health; nitrate and phosphate from fertilizers, livestock wastes and silage effluents contaminating water, and so contributing to algal blooms, deoxygenation, fish deaths and nuisance to leisure users; soil erosion disrupting watercourses, and run-off from eroded land causing flooding and damage to housing and natural resources; harm to consumers exposed to harmful residues and micro-organisms in foods; contamination of the atmospheric environment by methane, nitrous oxide and ammonia derived from livestock, their manures and fertilizers; ever fewer and larger farms; areas suffering from land abandonment and the rise of rural poverty and economic disadvantage. Organic farming, on the other hand, has been shown in Pretty et al.'s calculations to produce considerable positive externalities. In some circumstances, the public benefits provided by farmers may even exceed the private returns obtained by farmers themselves.

Critics like Dahlman (1979) challenge the idea of administrative (i.e. governmental) abilities to better cope with externalities than the free market could. His arguments are convincing, but seemingly not applicable to the agricultural sector. Pretty et al. (2001) characterize agricultural externalities with four features: (1) their costs are often neglected; (2) they often occur with a time lag; (3) they often damage groups whose interests are not represented; and (4) the identity of the producer of externalities is not always known. Consequently, under circumstances where time lags between cause and effect are often long, and power imbalances and uncertainty about who is to be held responsible and who will

suffer from negative externalities obviously appear, independent bodies that focus on the broader picture and use scientific expertise to evaluate diffuse outcomes of various economic activities arguably can reach better conclusions and outcomes than individual market actors.

Secondly, Dahlman's indication that it shouldn't matter who pays for negative side-effects, as long as the end result is optimal, is no longer valid once one accepts what all governments of the OECD already did in 1972, and laid down in the *Treaty of Rome* in 1995 – the '*Polluter Pays Principle*' (Pretty et al., 2001). Even if one believes in the superiority of the invisible hand, the problem remains that bargaining requires a minimum of power. Parts of society, and particularly nature itself, lack this ability to make their voice heard. Free markets may therefore very well lead to optimal allocation of resources, surely not to ideal (i.e. fair and morally acceptable) allocation of scarce resources, though.

Additionally, some of the goods and services provided by agriculture, such as most ecosystem functions, will always remain public goods, and incentives or public support is necessary to ensure the continued provision of these positive externalities (Cromwell et al., 2000).

Once there is consensus on the necessity to counteract externalities, there are three options to discourage negative environmental and social externalities from agricultural activity: (1) environmental taxes; (2) a subsidy and incentive reform; and (3) institutional and participatory mechanisms (Pretty et al., 2001). Important to mention here is that the biggest difficulty is to combine the various policy tools into effective packages. As Westerlund (2007) explains, controlling humans is difficult. Furthermore, he reminds the reader that it is important to keep in mind that nature does not compromise. We cannot argue or negotiate with it.

According to Westerlund, the best approach is a so-called 'three filter system'. These filters – in ascending order: ethical-, economic- and law-filter – combine soft factors, economic incentives or penalties and legislative regulations. Naturally, in a society governed by the 'rule-of-law'¹⁰, all instruments must be based on law to be sure actors behave as intended. Applying all three filters to an environmental control system will then guarantee that not only the ethically conscious (first filter) and economically motivated (second filter) refrain from environmentally or socially harmful activity, but also those disregarding both ethical and economic impediments. Without a legislative safety net any system would be prone to 'free riding'.

The outcomes of such a system Westerlund exemplifies as following:

“If consumers intend to choose products according to their environmental considerations, then their conduct belongs to the first filter. These consumers can be guided by information. If producers tend to give false information, and if this is not illegal, then consumers will most probably not trust information about products and consequently make uninformed choices when shopping. If on the other hand there are legal requirements about the basis of consumer's information, and if false information is a criminal offence, then the law thereby has added to the effectiveness of information, resulting in some consumers choosing environmentally preferable alternatives.” (Westerlund, 2007:82)

Different instruments of the system are thereby reinforcing each other and improving the effectiveness of the whole.

¹⁰ “A state based on the Rule of Law requires everyone, even the state itself, not to go outside the law in their decisions and conduct.” (Westerlund, 2007:19)

External Pressure

Discussing farmers' choice to either continue conventional practices or convert to organic methods, one may be misled to believe that it is exclusively up to farmers and their families to decide on how to run a farm. This is, of course, not the case. In contrary, farmers are highly dependent on others and thereby vulnerable to external pressure.

Just like any other economical sector, agriculture has to adapt to societal changes and newly emerging cultural ideas. This could certainly be interpreted as profitable to the organic movement, given the increasing popularity of organic food and fibres among growing parts of society and the prediction that this trend is here to stay; at least in the near- and medium term.

Seemingly persistent conservatism among the farmers' corps towards (sustainable) changes may frustrate advocates for a major agrarian reform. Yet, this conservatism is not so much of political nature, as it is pragmatic. In general, a farmer's aim must primarily be to reduce risk (Eswaran & Reich, undated). In this light, the strategy to stick to known and experienced methods seems rational. Today's reality, in which the future of agriculture is unclear, fundamental changes to one's own farm are to be evaluated thoroughly. This becomes even more valid, considering that many farmers are only trying to keep their heads financially above water, rather than looking for the "next big investment opportunity".

I want to mention an interesting report from the *Swedish Board of Agriculture* (Jordbruksverket) at this point, which analyses the reasons behind the unwillingness of many Swedish farmers to convert to organic farming, despite soaring market demand, and often higher profitability in organic- compared to conventional farming¹¹. A number of factors are mentioned that repress a faster growth in organic farming. The report states that producers primarily strive for risk reduction. According to the *Jordbruksverket*, farmers consider it essential to be able to plan on a long-term basis, including stable demand on the market to guarantee long-term profitability. Therefore, it seems quite natural for farmers to tend to rely on well-known and manageable methods. Conventional farming, as a well-known system, provides this security. A conversion to organic farming always means the necessity to learn new methods and even a new way of reasoning. Organic farming, on the other hand, brings about higher variation in prices and profitability. Additionally, risks for a reduced or even lost harvest are higher in organic farming. Organic production means a bigger physical workload and – varying by product class – substantial investment and reorganisation on the farm. Together with a legislation that is considered difficult to fulfil and cumbersome in practice, organic agriculture has acquired a disadvantageous reputation among parts of Swedish conventional farmers (Jordbruksverket, 2008a). Only if long-term support for organic farming and the economic reasonability of a conversion are assured, can the sector flourish; political uncertainty on the other hand, undermines brave moves from the farmers' side (Jordbruksverket, 2008b).

Strong local networks and well established power relations, frequently present in the rural context, put additional pressure on those farmers thinking about an adoption of organic farming principles. These networks reward accepted, well-known behaviour, while punishing new, different approaches.

Overall, farmers perceive their occupation as close to nature and see themselves as acting responsible toward the environment. It then seems unnecessary to such networks to break with common practices in order to work more environmentally friendly. Criticism of their practices – especially from non-agricultural side – may easily be considered inappropriate and unrealistic, as well as it may represent a serious accusation to the individual farmer (Borgström & Ekman, 1992). Early attempts to convince farmers to become more

¹¹ In this case, mainly crop and milk production.

environmentally friendly failed to acknowledge that careful business planning on the farmer's side usually is part of the explanation for the use of conventional practices, and it implied instead that conventional farmers simply used chemical sprays in a reckless manner, with no consideration for the environment; thereby not acknowledging the farmer's role as an environmental steward (Brodt et al., 2006). It mustn't be forgotten that farmers themselves can feel uneasy about applying fertilizers, pesticides or hormones, but feel pressured by consumer demand for ever cheaper food and the overall believe that increasing yields are the best indicator for a farmer's skilfulness. Brodt et al. (2006) showed that farmers often agree that economic considerations limit their ability to adopt an optimally sustainable approach on their farms. They could feel that they were not in control of their own destiny due to the complexity of the market. Farmers and farm workers are, in fact, disproportionately exposed to the risks of pesticide-related illnesses and injuries. Poverty, limited resources and political and social constraints have restricted the ability of rural people all over the world to exchange and learn about, test, adapt, and replicate environmentally and socially appropriate approaches of sustainable agriculture. Disadvantaged groups, including small farmers, are often unable to secure or improve their own livelihoods due to resource constraints or lack of influence over the policies, processes and institutions that affect them (FAO, www). The sector also suffers from low producer prices, low farm worker wages, and poor working conditions (Brodt et al., 2006). Farmers may therefore suffer from frustration for being part of structures they do not control. Being restricted in decision-making by earlier investments, loans and the necessity to produce effectively as well as the insight that alternative production often also requires alternative distribution channels and the establishment of new markets prevents a considerable share of farmers from trying new, promising alternatives to their actual farming habits (Borgström & Ekman, 1992). To improve the situation for disadvantaged groups, the FAO (1995) suggests more equal benefit sharing, poverty reduction, enhanced livelihoods and the promotion of sustainable development. Concretely, they aim at linking resources, expertise, knowledge and technologies to the demands of rural communities and disadvantaged stakeholders.

Sustainable Agriculture and Rural Development

Agriculture is of major importance to rural Turkey, and both affecting and being affected by RD. During the past decades, in the context of overall urban biased macroeconomic policies and discrimination against rural areas (UN, 2000), lack of financial means amongst farmers led to ignorance of environmental conservation and to abandonment of unproductive land. Often, agricultural policies in developing countries like Turkey have further worsened the misuse of resources. The, in majority family-owned holdings with low financial means, are primarily concerned with farm profitability and less with resource conservation, unless in cases where there is a direct proportional relation between the two objectives. In most cases, though, the economic and environmental objectives are competitive (Toma, 2003). Additionally, as shown in table 2, unattractive conditions in the countryside contributed to rapid depopulation, decreasing the share of Turkish population living in rural environments from 75.8 % in 1927 to 34.2 % in 2002.

Table 2: Development of urban and rural population in Turkey between 1927-2002

Year	Population (in percent)	
	Urban	Rural
1927	24.2	75.8
1940	24.4	75.6
1950	25.0	75.0
1960	31.9	68.1

1970	38.5	61.5
1980	43.9	56.1
1990	59.0	41.0
2000	64.7	35.3
2002	65.8	34.2

Source: EC Directorate-General for Agriculture, 2003 (modified)

This combination of a vulnerable economy and depopulation puts naturally valuable farmland areas under severe pressure. The predominant agricultural trends of intensification on the one hand and land abandonment on the other, are considered detrimental to biodiversity (EEA, 2004). The simultaneous combating of rural poverty and environmental degradation requires a conducive policy environment that promotes natural resource conservation, improves access to land, combats poverty, creates employment and reduces rural emigration (UN, 2000). The 2005 IUCN ‘*Conservation for Poverty Reduction*’-initiative¹² is conform in this point, pointing out biodiversity conservation as a tool for improving human well-being (IUCN, www).

Brodt et al.’s (2006) recent case study from California, which examines the relation of sustainable farming to RD, has found some hints that local small-scale farming is also promoting RD. In respect to an area that has to cope with high rates of population growth and urbanization and an agricultural sector in economic troubles, they argue that environmental sustainability and community viability are inherently linked and most effectively addressed together. Thereby not only would the natural environment be protected, but also rural communities and small family-run farms benefit. Such farms tend to require more locally produced inputs and are inherently more consumer-oriented and more closely tied to local markets, what in its turn benefits rural communities. Still, the authors of this study hesitate to highlight organic farming as an easy solution to all problems in their case study-area. As they inform, even organic farming in the area is heavily commodity-oriented and export oriented. All farmers in the area produce the same crop and therefore of necessity rely substantially on exports. If the strategy to combine action to stimulate RD and sustainable farming is to have success, producers have to diversify their operations, produce small quantities of a large variety of products at regular or frequent intervals, and learn new skills such as customer service. The authors of the study also stress the necessity of support from public institutions in order to create a vibrant and sustainable community through local marketing actions, farmland preservation efforts, etc. For the individual farmer it is often too risky and difficult to take the initiative all by himself, trying to track and predict the market.

Support for the standpoint that organic farming can contribute to RD comes from research conducted by Pimentel et al. (2005) that shows organic farming requiring in average 15 % more labour (thus, creating rural jobs). Additionally, the study showed higher soil organic matter for organic farming, leading to more stable yields in drought years.

Human capital development is arguably among the most effective strategies geared to conserving and restoring natural resources. In order to prepare farmers for changing economic and environmental conditions, policy makers should support local research and information and education programs. Further policies should aim at preserving plant genetic resources, combating the degradation of agricultural land and overcoming the excessive use of mineral fertilizers and/or livestock wastes. This would not only reduce enormous anticipated future

¹² The ‘Conservation for Poverty Reduction Initiative’ (CPRI) is a global IUCN-campaign, focusing on biodiversity conservation as a tool to improve human well-being. As healthy ecosystems deliver essential services to all people – but are especially important to the rural poor – they need to be protected. Within the conservation community there is strong belief that poverty is correlated with reduced status of biodiversity resources and ecosystem capacity. (IUCN, www)

cost of land degradation, but also serve as disaster prevention and preparedness, especially for the poor. (Toma, 2003; UN, 2000)

Policy recommendations to improve the situation for farmers without harming the environment are best based on incentives, rather than regulations and bans. In the case of poor farmers, the ‘carrot-approach’ is more suitable than the ‘stick’. The EC (1999) suggests in Council Regulation No 1257/1999 that agri-environmental aid schemes have to continue to encourage farmers to serve society as a whole by introducing or continuing the use of farming practices compatible with the increasing need to protect and improve the environment, natural resources, soil and genetic diversity and to maintain the landscape and the countryside. The same document points out the demand from consumer side for organically produced agricultural products and foodstuffs. This newly created market contributes, through improving the sustainability of farming activities, to the general aims of rural development and therefore qualifies for rural development support measures. For the same reason organic farming is presented as a means to support RD in the process of reform of the EU-CAP (Stopes et al, 2007). The hope is that organic agriculture can link food production, income generation and environmental protection requirements by making maximum use of local knowledge, biodiversity, on-farm resources and biological control of pests and avoiding the use of agro-chemicals (UN, 2000).

ASSUMPTIONS

This thesis is based on the assumption that organic farming is more sustainable than its conventional counterpart; but the transformation process a farm(er) has to undergo in order to be classified ‘organic’ is complicated, complex and time consuming. It is not a farmer’s exclusive decision whether to convert, but also largely depending on the greater societal context. Farmers, like other participants of society, are forced to comply with societal, economical and logistical restrictions and are exposed to informational, financial or political constraints. Once organic farming methods are implemented, on the other hand, additional environmental, social and economical services are provided to society as a whole.

Even if a market for organic products is in place and willing to pay price premiums, it is further assumed that society (i.e. the state) has to take responsibility, and compensate farmers for the additional services they provide in order to make up for additional efforts organic farming requires. To this day, Turkish farmers are those profiting least from the organic sector’s development in Turkey. To make sure OA can live up to its reputation for being more sustainable than conventional production systems, both, money and additional effort are necessary from society’s side.

From the perspective of a researcher, mostly interested in the sustainability dimension of OA, it is not irrelevant where the majority of benefits materialize. It is an over-simplified assumption to regard OA as sustainable per se. Rather than to look at the *if*, it must be examined *how* organic farming is carried out. In line with other researchers (e.g. Milestad, 2003), I assume the most sustainable version of OA is a decentralized, farmer-lead structure, distributing economic profits evenly among many small-scale farmers, adding to the social stability and vitalisation of the countryside and contributing to ecological diversity through diversified production. I therefore conclude that organic farming has to first and foremost improve the situation of family-run farms. It is essential to put the farmer in the centre of all efforts to support OA. Otherwise the risk to develop it into “just another industry” is substantial. Thereby the very reason for the existence of the organic movement would be reduced to absurdity.

My assumption here is that a large network has to exist in and around the organic sector to activate and support farmers' willingness to switch production systems. This network has to be active on many different levels to reduce the risks that come along with conversion. Turkish institutionalisation of OA has not come as far as in Western Europe. It is therefore questionable whether the MARA has the expertise, staff, influence and organisational and structural prerequisites to effectively support growth of organic farming in Turkey. At the same time, I assume that increased effort from MARA's side to push OA in Turkey would favour the country's attempts to join the EU, and help it to fulfil both, environmental (erosion/desertification, biodiversity loss) and social (RD) requirements. A more active civil society, co-operating both domestically and internationally, must also take responsibility and pave the ground for increased interest in OA. All this has to occur with the farmer as main beneficiary in mind.

LITERATURE REVIEW

The English speaking literature on OA in Turkey is narrow, and comprehensive studies about the sector are scarce (Stopes & Ananias, 2006). It is therefore not easy to get a thorough picture of the reality for local organic farmers. Existing literature reveals some obstacles, though, which farmers have to deal with.

Research conducted by Stopes & Ananias (2006) criticises the low level of coordination and expertise at the MARA and among other stakeholders, as well as the lack of an overall strategic framework for the development of OA. The OTYK in particular is described as a unit lacking expertise and therefore unable to effectively contribute to topics relevant to OA. Extension services, which are currently offered by the 81 Provincial MARA Offices all around Turkey are described as unsatisfying, resulting in only limited availability of information to farmers and other stakeholders. This is alarming if considered that, while conventional production mainly depends on costly investments in irrigation, energy and external inputs, organic systems rely on capacity building through research and training.

Rehber & Turhan (2002) state that any further improvement of the organic sector in Turkey will require both, organized action from the farmers' side and government support, mainly for the marketing of certified organic products. Today, low income levels among farmers are causing risk aversion. Combined with the fertilizer- and pesticide-ban-triggered belief that yields in OA are lower (Kenanoglu & Karahan, 2002) many conventional farmers are hesitant to conversion. Rehber & Turhan (2002) clarify that, even though loss in yields is possible – especially during conversion –, much depends on inherent biological attributes of the farm, the farmer's expertise, and the extent to which synthetic inputs were used under the previous management system. They also claim that, if practiced well enough, OA can actually help to increase productivity.

Furthermore, the dominant role of the export market, and the therefrom resulting dependency of farmers on export companies is mentioned as potentially troublesome. The nowadays so essential export market could in face of an insignificantly small domestic market soon turn into a serious obstacle for the future development of the sector. This is when foreign demand influences all decisions in organic production. Trimmed to fit export markets, such a structure misses the necessary variety to provide suitable supply for the domestic market (Özbilge, 2007).

On the consumer side, low levels of income among the Turkish population and an unbalanced distribution of wealth, combined with considerable price-differences between conventional and organic food hinder any fast development of the domestic market (Kenanoglu & Karahan, 2002).

If present-day obstacles are overcome, several studies (Cakmak, 1998; Engindeniz & Tüzel, 2006; Eraslan, 2004; Yücel et al., 2007) indicate that OA can play a key role in RD and poverty alleviation. OA, as labour-intensive production system, could fit Turkey for two purposes: to provide employment for the young, rural population, and – with all the available cheap labour – to compete successfully on the international market. On the consumption side, it is anticipated that costs will decrease if sales increase and the system becomes more professionalized. The mentioned authors describe OA as possibility to contribute to consumer welfare, and increase net profits per hectare, thus to become an economically viable alternative for consumers and small-scale farmers alike.

Ilter et al. (1996) therefore urge decision-makers not to focus on costs exclusively, but conduct a comprehensive feasibility study. Only if social and environmental costs and benefits are considered can serious decisions and recommendations be made.

METHODOLOGY

Any answer to my research question has to incorporate various aspects, as it is rooted in disciplines as diverse as economics, political sciences, sociology and psychology; it is multidisciplinary; and it concerns a great number of stakeholders, who differ in knowledge, ideology and interest, and all of them influence the agricultural sector in one way or another. The very dynamic nature of such a constellation requires a multidisciplinary approach, as – in the tradition of a typical sustainability problem – it incorporates social, economic and environmental aspects.

The initial idea for the methodological design of this study was grounded in the assumptions specified earlier in the text that farmers are both, dependent on, and strongly influenced by society, but also the most important (and numerous) stakeholders for the success of the organic sector. I therefore considered it most logical to base this study on the opinion of farmers. Complementary to what farmers would tell me about the problems of the sector and how to solve them, I considered it helpful to collect background information from other relevant stakeholders.

Under the circumstances stated, a ‘stakeholder analysis’ seemed most suitable for my purpose. This meant for me to get myself involved with the sector, meet and interview numerous stakeholders from various origin and try to understand the dynamics effecting the organic movement. My research was aiming at satisfactory results through a tripartite approach, incorporating all relevant stakeholder-groups: 1) farmers, 2) actors within the agricultural sector, 3) consumers. This was primarily achieved through semi-structured interviews with various stakeholders, complemented with two surveys, one aiming at consumers, the other at sector-stakeholders.

The idea with the two surveys was to make it easier to appraise the Turkish organic sector and suggest a number of measures to improve the situation, while minimizing the risk for misunderstanding/-interpretation of stakeholders’ statements from the semi-structured interviews. The first of the two surveys – an online survey – tried to catch the opinion of stakeholders¹³; the second was focussing on Turkish consumers.

¹³ A detailed list of stakeholders I was in contact with is provided in appendix 4. Please note that contact to stakeholders ranged from multiple meetings with long semi-structured interviews to simple participation in the online survey.

The work for this thesis started in early 2008. I first had to find supervisors in Sweden and Turkey, and also to get a first impression about the organic sector in Turkey. Literature collection and review started in the second quarter of 2008, and lasted all the way through the fieldwork and even the writing process until spring 2009. Still, most of the reading was done during the 6 months of preparation prior to my arrival in Turkey in September 2008.

The fieldwork for this study can be divided into an extensive, and an intensive phase; extensive referring to the period between September-December 2008, which I spent in Istanbul. First and foremost, I was there for a not directly thesis-related internship, and therefore could only dedicate about 25 % of my time to research concerning OA in Turkey. During this time, I was interviewing stakeholders and networking for the preparation of the more intensive period that should follow. Trips to Ankara and the village of Bahcedere also fell in this time frame.

The months of January and February 2009, on the other hand, were exclusively scheduled for research in the field. The hotspot for OA in Turkey – the Aegean-region – was also the area I chose to conduct most of my data collection in. Furthermore I went to Ankara for a second time, and also visited the Black Sea-region, where an interesting project with the participation of Samsun Municipality, *Buğday* and local farmers had been initiated.

Workshops and Interviews with Farmers

The field-study (as planned) was assembled around four core-workshops, intended to be held in January 2009 with Turkish farmers, divided into male and female, as well as organically and conventionally producing. Frequently in contact with my supervisors in Sweden and Turkey, I had, well in advance, developed the workshop schedules¹⁴ (Appendix 1).

Once in Izmir, I had to learn that chances for the successful realization of this – for local standards on how scientific work with farmers is usually conducted – ambitious program were low. Because of the, to me unfamiliar history and structure of the organic sector and the resulting role of farmers in it, I was advised not to aim too high or expect too much from my encounters with farmers. They could react distressed if confronted with complex tasks they were not familiar with, I was informed. Apparently, it was not common practice to approach farmers the way I had planned to. I therefore had to give up my initial plan for the four workshops.

Instead simple semi-structured interviews and round-table discussions in the farmers' natural surroundings (i.e. village tea-houses, their own farms, on the market) were suggested. Thereby, encounters would be easier to arrange and farmers find it more natural to express themselves.

Certainly, I knew that the depth-of-analysis of the farmers' point-of-view would suffer from the new approach. Nevertheless, I felt I had no alternative to accepting this change of plans, especially because, as a student, I was inexperienced in how to conduct field-research and therefore dependent on help from others, and as a foreigner I had little knowledge about common practice on site.

Conforming to my initial idea to put farmers in the focus of this study, one part of the research-work was focusing on farmers, with round-table discussions in the villages of Tekelioglu, Yeniköy (both Aegean-region) and Gökkaya (Black Sea-region), field trips to Bahcedere (Marmara-region), Kirasli, Kemalpasa (both Aegean-region), Terme (Black Sea-region), farm visits to Mustafa Bukey (farmer and entrepreneur) and Degirmen (large organic

¹⁴ According to planning, the workshops would be customized to conventional and organic farmers, respectively.

farm) and organic farmers' markets in Istanbul (% 100 Sisli Ekolojik Halk Pazari¹⁵), Ankara (Cankaya Ekolojik Pazari) and Samsun (% 100 Gazi Ekolojik Halk Pazari).

Interviews and Online-Survey with Stakeholders

Secondly, I tried to “catch” as high, and as various as possible a number of actors in the sector. Apart from the stakeholder-groups farmers and consumers, whom I dealt with separately, I incorporated representatives from academia, the business sector (including processors, exporters, certification- and consultancy companies), governmental institutions, international institutions and civil society/the NGO-scene. In the course of my study I talked to 43 stakeholders (not including farmers and consumers) in person, conducting 30 semi-structured interviews, which I kept track of through personal notes during the interviews, followed by transcription afterwards.

To add additional weight to my observations, I designed an online-survey (Appendix 3), which I sent out to 91 stakeholders, and was answered by 20.

Consumer-Survey

To find out how consumers think about OA and behave towards organic products I decided to design a consumer questionnaire (Appendix 2), and get it translated into Turkish. The population-sample selection can be described as ‘opportunity sampling’, meaning I deliberately and exclusively chose supermarkets and/or bazaars to approach consumers, and asked customers that happened to walk in or out the supermarket to fill out a questionnaire. At maximum I conducted 5 questionnaires at the same spot. The, in total, 18 supermarkets were located in 13 different quarters of five cities (Istanbul, Izmir, Ankara, Samsun, Kücükkyü). Additionally I went to the organic farmers markets in Istanbul-Sisli, Ankara-Cankaya and Samsun. In total, 78 consumers were willing to fill out the questionnaire. As shown in table 3, almost half of all respondents were from the mega-city Istanbul. Two-thirds were male and married/cohabiting (in average 3.17 people/household, with 1.2 children). With an average age of 43 years, respondents were well above the Turkish national average. Higher education (high school or university degree) was overrepresented in my sample-population, as well as wealthier parts of the population (mean income at 2823 YTL).

The explanation for the male, well educated, wealthy and urban overrepresentation in my sample-population is certainly due to cultural and communicational difficulties. Even though I tried to approach people of all ages and both sexes, and usually addressed them in Turkish, I realized already during the conducting of the survey that women (especially those wearing head-scarves) would be underrepresented. Cultural/religious constraints¹⁶ prevented me from modifying my approach, though.

¹⁵ % 100 Ekolojik Halk Pazari is a brand-name created by the NGO Buğday, uniting and branding all organic farmers' markets initiated and coordinated by Buğday. So far, 4 of these markets are operating (Istanbul, Samsun, Bursa, Antalya), with at least two more in the planning stage (Istanbul, Izmir).

¹⁶ Several times I was rejected when approaching one or more unaccompanied women. In situations where I approached couples, usually the men were emerging as my communication counterpart, while women stayed in the back.

Table 3: Demographic description of consumer sample-population

Location	Ankara Istanbul Izmir Kucukkuyu Samsun	11.5 % 42.3 % 25.6 % 9 % 11.5 %
Sex	Male Female	61.5 % 38.5 %
Age	Mean Min. Max.	42.88 years 19 years 72 years
Marital status	Singles Married/cohabiting Divorced/widowed No information	23.1 % 67.9 % 7.7 % 1.3 %
People in Household (hh)	Mean 1 2 3 4 5 more	3.17 6.4 % 29.5 % 24.4 % 28.2 % 6.5 % 5 %
Children in hh	Mean 0 1 2 3 4 No information	1.2 23.1 % 21.8 % 19.2 % 5.1 % 2.6 % 28.2 %
Age of children in hh	0-2 years 3-6 years 7-11 years 12-17 years No children/no information	12.8 % 11.5 % 15.4 % 16.7 % 43.6 %
Education	Primary school High school University No information	10.3 % 41 % 39.7 % 9 %
Occupation	Student Housewife Employee/worker Retired	2 people 10 people 54 people 12 people

Monthly income	Mean	2823 YTL
	Median	1750 YTL
	Min.	200 YTL
	Max.	20000 YTL

Kolb's Learning Cycle

During the research-period, my understanding of the Turkish organic sector had to be adjusted numerous times. The process of generating my conclusions and suggestions is therefore best described as Kolb's Learning Cycle (Eksvärd, undated; Davies, 2009). Even though primarily aiming at learning and teaching, Kolb's Learning Cycle is easily applicable to a research process in which the researcher repeatedly tests his/her findings against reality, evaluates the results, and reaches new, updated abstractions/generalisations, which then have to be tested again.

"The [researcher] must make the link between the theory and action by planning, acting out, reflecting and relating it back to the theory." (Davies, 2009)

Both, in terms of literature review and interview questions, the learning-cycle theory describes well how I was working.

Only in respect to the consumer- and online questionnaire my approach was differing. Due to the pursuit of statistical validity it was not possible to adapt the questionnaire in the course of my study, even though further insight into the sector and eventual criticism from esteemed side¹⁷ would otherwise have prompted me to rearrange the consumer-questionnaire somewhat.

I used the software SPSS/PASW Statistics to extract data from the collected questionnaires.

¹⁷ Rather late in the process of collecting responses from my stakeholder-online-questionnaire, Christopher Stopes, who had been in charge of an important EU-MARA project, called the questions I developed "poorly expressed", and doubted I would find the results of much use.

RESULTS

EuropeAid/121154/D/SV/TR

The most recent, and, so far, also most comprehensive attempt to analyse the Turkish organic sector was a project conducted by SAC¹⁸ (EuropeAid/121154/D/SV/TR), for and in cooperation with the MARA, and funded by the EU¹⁹. This project, running between June 2006 and November 2007, dealt with a broad variety of aspects: legislation, policy and the *Turkey Organic Food and Farming Action Plan* (TOFFAP); institutional arrangements and training; certification and control; pilot projects and information; and communication. The intention was to analyse, understand and consequently improve the organic sector in Turkey, both in terms of compatibility of the sector to OA in the EU, as well as the sector's overall development.

As result of this study the MARA was advised to strategically develop the organic sector, so that it could benefit the country's attempts in the fields of RD, employment, human health and environmental protection. A National Action Plan (NAP) for OA was drafted and communicated to the MARA, with the advise to implement and monitor its' achievements. In respect to the EU, continuous harmonization with EU-legislation on OA and increased efforts to be admitted to the 3rd country list were stressed. It was also made clear that the Turkish organic sector needs increased stakeholder networking and training (Bagatur et al., 2007; Stopes et al., 2007). As part of my study, I wanted to examine how far – in the eyes of the sector's stakeholders – Turkey had come with these suggested improvements (table 4).

In the following, the results of the stakeholder questionnaire will be combined with findings from the semi-structured interviews and the results from the consumer-survey; all with the aim to present the reader with a comprehensive picture of chances and hindrances farmers have to deal with in respect to organic farming in Turkey.

Table 4: Stakeholder view on progress in the suggested measurements by EU-MARA-project EUROPEAID/121154/D/SV/TR (all numbers represent percentage values)

<i>How well do the activities in the table below work in the Turkish organic sector?</i>				
	Well	Somewhat	Not at all	No answer
1. Coordinated, strategic development guided by the MARA	35	60	5	-
2. Implementation of the NAP	10	65	20	5
3. Creation of coherent, complementary and consistent policy measures to support OA and connect it to RD	35	40	15	10
4. Preparation of a clear and accessible Turkish National Organic Standard	35	35	25	5
5. Acceptance of Turkey to the EU's 3 rd Country Status	15	50	20	15
6. Creation of a stakeholder network	15	40	30	15

¹⁸ Project-Consultant: SAC, Ferguson 'Building, Crainbstone Estate, Aberdeen, AB21 9YA, Scotland, UK

¹⁹ Project Title: Technical Assistance for the Ministry of Agriculture and Rural Affairs for the alignment of organic agriculture legislation to the EU *acquis* and the development of organic agriculture in Turkey; Project Number: EuropeAid/121154/D/SV/TR

7. Equivalent standards and laws for all control and certification bodies operating in Turkey	35	35	20	10
8. Extension and advisory support from MARA Provincial Office Organic Units	20	50	20	10
9. Establishment of an effective and efficient database system and data collection	25	35	30	10
10. Implementation of pilot- and model-projects	30	50	10	10

Striking in respect to the results in table 4 is the obvious dissension about hitherto achievements among the 20 stakeholders who answered the questionnaire. In almost all cases, ‘somewhat’ turned out to be the favoured answer. Together with those choosing not to answer a question, the majority of all participants avoided to take a distinct position.

Relatively clear were the answers to questions #1, 3, 7 and 10. 35% believed the MARA was doing a good job coordinating strategic development of the organic sector in Turkey (only 5% thought the opposite), and that their work was based on a coherent, complementary and consistent policy (well – 35%; not at all – 15%). A relative majority also regarded standards and laws for control and certification bodies (35%; not at all – 20%) and the implementation of pilot- and model-projects as good (30%; not at all – 10%). In connection with the information that the *Turkish Accreditation Agency* (TURKAK) is now fully accepted by the International Accreditation Forum and has already started to accredit organic inspection and certification companies according to EN45011 (Aksoy, pers. comm.), real improvements can be asserted.

Most confusion seems to persist around question #9, in which answers were more or less equally distributed. It is well-known among stakeholders that there is a problem with the accuracy and completeness of the information available on values and volumes of organic food exports, as well as there are shortcomings in data collection concerning organic farms. Most likely, it will take some time to resolve these issues in the course of Turkey’s accession to the EU. Until then, farmers and other interested parties will have to continue to rely upon the incomplete information held by the *Land Registry and Cadastre Information System* (TAKBIS) of the *Cadastre General Directorate* (Stopes et al., 2007), the information provided by the AEA and the *Turkish Statistical Institute* (TURKSTAT).

In respect to harmonization efforts one interviewed stakeholder claimed that:

“the MARA has data but even though the AEA asked for it and the MARA promised [to provide it], they didn’t provide it”. (Stakeholder, Institutional Sector)

Since Turkey joined the *European Information System for Organic Markets* (EISfOM) and started to follow EUROSTAT norms in data collection (Aksoy, pers. comm.), data-collection has become more of a focus for the MARA/AAPT Dept., and an improved farmer registration system is planned for.

In respect to a clear and accessible Turkish National Organic Standard (question #4), stakeholders seem to be quite positive (well – 35%, somewhat – 35%). In the future the process of developing new Turkish legislation, providing the opportunity for a new Turkish

Organic Standard, accessible to all operators, as well as consumers, will gain momentum through the necessary accordance with the EU, which recently passed a new organic regulation (834/2007) (Stopes et al., 2007).

Regarding questions # 2, 5 and 8, I interpret the very high values for ‘somewhat’ as an indication that most stakeholders consider improvements on their way, but not yet sufficient. In both cases the questionnaire-answers match the information I gathered from other sources. In its’ progress reports on the achievements Turkey has made in respect to the adoption of the *EU-acquis*, progress towards achieving ‘Third Country status’ with the EU (as defined in the EU Organic Regulation 2092/91) was confirmed. Further, Dr. Müfit Engiz, the head of the AAPT Dept., confirmed in an interview that the AAPT Dept. was working on acceptance of Turkey in the 3rd Country list, but had not quite succeeded yet (Engiz, pers. comm.). Regarding the NAP for OA, the fact that stakeholders seem indecisive about its’ successful implementation can be explained with the very recent initiative the NAP has emerged from. According to Bagatur et al. (2007) the NAP for Turkey was submitted to the MARA in 2007. It was then expected that the plan would be adopted and implemented by the MARA and OTYK over a 3-years period (2008-2010). Only then – after the evaluation of the plan’s success – should a 5-years plan be adopted. We are therefore in the beginning-phase of the implementation of the NAP, and 65% of respondents answering with ‘somewhat’ may be interpreted as indicator that the plan is on the move.

Not quite as positive as the responses from the questionnaire were the reactions I met during my interviews concerning the MARA’s strategic planning and policy making. Most of the statements concerning the MARA’s role and performance were critical. The AAPT Dept., on the other hand, was described as committed, but weak and unorganized. It is believed that the MARA’s bureaucratic structures and lack of experience in organic farming, together with unclear allocation of duties and power is reducing its’ effectiveness. Still, there seems to be a change in perception under way, with the MARA and the AAPT Dept. gaining both competence and trust among stakeholders, which is what could reflect in my questionnaires responses. Stopes et al. (2007b) state that

“The challenge faced today by MARA is the effective planning and coordination of the organisation and the institutional support for organic farming in Turkey. [The] synergies of horizontal collaborations and the decentralisations of managements are still impeded by coordination deficiency. This lack of integrated support to organic production, distribution and promotion should be resolved by the Turkey Organic Food and Farming Action Plan (TOFFAP) which defines strategic objectives and actions for the development of the organic food and farming sector in Turkey”. (Stopes et al., 2007b:20)

The only “clear” negative perception appeared in question #6. Only 15% thought the creation of a stakeholder network has been successful so far, while twice as many (30%) think it has not been working at all.

Problem sources

Besides the advancements in what the EU/MARA-project came up with as suggested improvements, I also wanted to quantify tendencies I had recognized during the numerous interviews I conducted with stakeholders. Table 5 presents questionnaire-results for questions I formulated according to what I regarded worth evaluating statistically after a first round of conclusions in the midst of the research process.

Table 5: Proposed explanations for problems in the Turkish organic sector (all numbers represent percentage values)

<i>Do you agree or disagree to the following statements?</i>	Agree	Disagree	No answer
1. The Turkish government has more important issues to deal with than organic farming and therefore cannot devote the necessary attention to the development of organic farming in Turkey.	42.1	57.9	-
2. The current laws concerning organic farming in Turkey are hindering organic farming's development.	42.1	52.6	5.3
3. The Turkish law on organic agriculture is not suitable for farmers' organization.	47.4	47.4	5.3
4. Incentives for cooperation among actors in the organic sector are not big enough.	94.7	5.3	-
5. The public institutions are not used to cooperation with the private or civil society.	68.4	26.3	5.3
6. Today, organic agriculture in Turkey is not sufficiently institutionalized.	89.5	10.5	-
7. The Turkish mentality is not cooperation-friendly	52.6	41.7	5.3
8. Because farmers are too unorganized they profit least from organic farming.	78.9	21.1	-
9. Turkey is at risk to be out-competed by other countries.	42.1	52.6	5.3
10. Turkish organic farmers are poorly represented in the organic sector.	94.7	5.3	-
11. Farmers are taking high risks when converting to organic farming.	47.4	52.6	-
12. Farmers are facing high entry barriers to organic farming.	73.7	26.3	-
13. Organic farmers in Turkey are not committed to organic farming, but only in for the money.	47.4	42.1	10.5
14. Farmers are difficult to educate.	42.1	52.6	5.3
15. Too little research is done on organic farming in Turkey.	73.7	26.3	-
16. Findings from studies and existing knowledge about the organic sector in Turkey are not implemented efficiently enough.	84.2	10.5	5.3
17. Today, the Turkish domestic market for organic products is not understood well enough, and more work has to be done regarding target-groups, motives behind organic consumption, etc.	84.2	15.8	-
18. The market is more important for organic farmers' future than government subsidies.	73.7	21.1	5.3

19. The EU is a good source of financing, knowledge and cooperation for the organic sector in Turkey.	84.2	10.5	5.3
20. In 2006/07 a EU-financed project, conducted by MARA resulted in a number of conclusions and recommendations for the development of organic farming in Turkey. Do you agree or disagree that these findings and conclusions are applied and show satisfactorily effects?	36.8	47.4	15.8

It turned out that, especially when it comes to essentials of this thesis dealing with organic farmers and their role, the results from the stakeholder-questionnaire fortify the qualitative data I collected. Yet, some other issues – such as the role of the MARA – showed differing responses to what I had perceived during the interview-period.

As mentioned earlier, in my meetings with stakeholders and farmers I got the impression that the MARA was considered inefficient and – especially with respect to the AAPT Dept. – of little importance to the overall policy of the Turkish government. Even though I was often told that – while in the past the MARA was indifferent to organic farming in Turkey – it now starts do recognize its responsibilities, a concern expressed by some stakeholders was that the government is favouring industrialisation over agriculture. Among the comments I received in my interviews were:

“The government is busy with other things than organic agriculture” (Stakeholder, Business sector),

“At the ministry you never know which interest-group will win” (Stakeholder, Civil Society),

“The government is inflexible and theoretical and in practical terms not much is to expect from them – initiatives always come from the private sector” (Stakeholder, Business sector), and

“Yes, implementation and consistency are big problems; due to underfinanced projects that have to be stopped before time, only because of lack of financial support” (Stakeholder, Institutional sector).

On the other hand, stakeholders seemed to approve recent attempts from the government’s side:

“The MARA now has a focus on organic agriculture – only 10-15 years ago there were only 2 persons dealing with organic agriculture in there, but after lobbying the MARA is committed now” (Stakeholder, Academia), and

“Until 5 years ago the sector was pushing the MARA, now they [i.e. the MARA] are in a stronger position” (ibid.).

It was surprising to me that 57.9% of respondents in the stakeholder-survey disagreed with suggestion #1 that the Turkish government had more important issues to deal with than organic farming. Neither did the majority of stakeholders agree with the claim that current laws were hindering organic farming’s development (#2). Only the statements that organic agriculture is not sufficiently institutionalized (#6), and that the Turkish public institutions were not used to cooperation with civil society (#5) received large acceptance.

Those questions dealing with the ordinary farmer’s position in the sector provoked more in line answers with what I was told during personal encounters with stakeholders.

Historically, with its' roots in the export business, the organic movement emerged as a company-driven, top-down system. During my study the Turkish organic sector turned out to have little in common with its European counterpart in terms of origin. Unlike in Europe, the development did not originate from farmers and consumers, wanting to establish an alternative to the common agriculture/retail system, but as a result of foreign consumers, demanding organic products that could not be grown in their home countries, or were cheaper to produce in Turkey. Thereby a profoundly different system established itself in Turkey. The typical Turkish organic farmer was not ideologically motivated, but simply delivering a product produced according to requirements the company he was contracted for would dictate, provide inputs and pay a premium for. These structures are persistent until today, with the consequence that farmers are both the weakest link but also poorly represented (#10: 94.7%). 78.9% of the stakeholders answering the questionnaire agreed that farmers were too unorganized to profit from organic farming (#8).

In the Turkish organic sector, its top-down structuredness is very obvious. Practically all stakeholders I met were expressing concern about this:

“There is no small farmers’ movement in Turkey” (Stakeholder, Civil Society),
“Interest generally doesn’t come from the farmers; you have to convince them” (Stakeholder, Civil Society),
“[There are] no benefits to local communities from export” (Stakeholder, Business sector), or
“Turkey terribly needs a farmers’ organisation. [...] This organisation would have to come from farmers themselves, but they are too frightened and uneducated to come together and act” (Stakeholder, Business sector).

Opinions about the reasons for the persisting top-heaviness of the sector differed, as well as the attitude towards farmers’ ability and willingness to play a more active role in the sector’s dynamics. My questionnaire shows that there is consensus (#12: 73.7%) that farmers are facing high entry barriers when they decide to convert to organic farming. On the other side, stakeholders do not agree to the idea that unsatisfactorily laws prevent farmers from organizing themselves (#3: 47.4% vs. 47.4%).

Farmers are in a weak position, and left with only a little share of the economic advantages deriving from organic farming. While the picture is less clear in respect to environmental and social profits, economically organic farmers do not seem to gain a lot from conversion. Even though price premiums on the export market are high, and premiums the domestic end-consumer has to pay sometimes excessive, typically only between 10-15 % price-premium is paid to the organic farmers (pers. comm.). Despite the high entry barriers farmers are facing (#12), the (economical) risks connected to a conversion are believed to be limited (#11: disagree – 52.6%), though.

This may have to do with the prevailing organisational structure of organic production in Turkey. According to Rauf Önal (pers. comm.) three types of formal arrangements in organic farming can be found in Turkey. Most common are company projects, where mostly export-oriented companies search for farmers (often a whole village) willing to adapt organic methods and produce a certain product the company is interested in. The company typically promises a certain price premium, yet formal contracts are not standard; thus neither side has absolute guarantee that the terms of agreement are still valid after the growing season. What farmers appreciate with such company-project-bound organic farming is high reliability. Close supervision from the company’s side, including training, advice and inputs (often for free) make a conversion much easier for uneducated, poorly connected small-scale farmers. As indicated, these contract farmers have no guarantee to sell their product, or to be rewarded

with the premium they had agreed upon before the season. In the end it is up to the company, which initiated the project, to decide if it needs all production from the project farmers. In a situation like at the moment (winter 08/09, spring 09), where a wider economic crisis is slowing down demand, the farmers may end up having to sell their produce at conventional prices.

Secondly, there is the option to individually convert to organic farming. Farmers that do so face a variety of challenges, ranging from obvious financial burdens (certification, controls, advice) to case-specific problems like learning about organic production methods, finding a market, and struggling for sufficient premiums. Without doubt, the potential benefits with such an undertaking are considerably higher compared to the former option, but so is the likelihood to fail. During my meetings with farmers it turned out that most favour the security and guidance of a company project over the possible rewards from independency. Of course, the explanation to the small number of individually certified farmers in Turkey is the ordinary Turkish farmer's more challenging starting position. Not only are subsidies lower, markets far away or too small, and organisational infrastructure weakly developed, but also is the knowledge level among farmers low, farm sizes small and dependency on farming to earn one's livelihood high. With reference to the often met risk aversion mentioned under the paragraph 'External Pressure', it is understandable farmers dread the challenges of individually running an organic farm in Turkey. There are of course exceptions from the rule, with farms like Degirmen-Group (Aegean-region), Ömercan Organic farm²⁰ (Marmara-region), and individuals like Rauf Önal (Mesurata Ltd., Izmir) showing that success as individual is possible; even though requiring educational and financial prerequisites.

Finally, an alternative that is, in theory, widely approved as a viable possibility to combine the advantages of company projects and being an individual organic farmer is the creation of cooperatives or farmers' unions. A number of successful cooperatives for (organic) farming can already be found in Turkey. Nevertheless, there are some obstacles to a wider adoption of this option. On the one side, several stakeholders expressed dissatisfaction with present-day legislation. Even though it is principally possible to establish cooperatives and farmers' unions, it is said to be difficult, and definitely not attractive enough to trigger a quick popularity-gain of such combined efforts. Recently (2005) a new law was passed by the parliament, aiming at facilitating the creation of farmers' unions.

Whether this goal has been achieved has yet to be seen. During my interviews I was informed that, varying by region, the majority of farmers in Turkey are not particularly eager to enter into cooperation with their peers. Farmers themselves explained that they would in general not expect fellow farmers to organize or even actively search for cooperation possibilities. Even though the advantages are obvious, there seem to be a number of hindrances towards self-initiated action from the farmers' side. Next to the mentioned inactivity, many interviewees also claimed Turkish farmers were rather hard to educate:

"Farmers are very resistant to advice from outside" (Stakeholder, Academia),

"Farmers don't know organic farming, don't want to pay [for] consultancy; they think they know everything" (Stakeholder, Business sector), or

"You have to choose [the] right people [for your project]; not anybody can do organic farming. Some farmers only want money and drop out or start their own thing as early as they see a chance" (Stakeholder, Civil Society).

²⁰ Due to not further explained "circumstances beyond Ömercan's control", the farm has recently been closed, and therewith stopped box deliveries from the farm. (Traher, pers. comm.)

This, of course, contradicts with what stakeholders were answering in the stakeholder-survey. Only 42.1% agreed that farmers were difficult to educate (#14), while the majority thought otherwise.

Due to the prevalent appearance of organic farming as contract manufacturing, farmers appeared motivated mostly by economic reasoning. Only in rare cases did I hear statements touching an ideological motivation behind the conversion to organic farming. If ever mentioned, environmental or social issues dealt with advantages in terms of farmers' and consumers' health deriving from organic farming. It was also claimed that farmers usually enter organic production for financial reasons and only later develop a more holistic approach. Still, taking the survey-results and some of my interviews into consideration, this does not appear to be the whole truth. After all, the share of those believing farmers were engaged in organic farming only for the money was far from convincing (#13: 47.4% vs. 42.1%).

In a significant number of interviews dissatisfaction with the level of trust between actors and a lack of willingness to cooperate were expressed. It was reported that there are trust issues between consumers and producers, producers and middlemen, consumers and certification companies, NGOs and state institutions (municipalities), project companies and farmers, consultants and NGOs, and between NGOs.

One of the reasons explaining the lack of trust in the Turkish organic scene is power-imbalance. According to the results from my stakeholder-survey, certification companies, followed by foreign trade-companies and the MARA are the most powerful players in the sector. The EU, universities, consulting companies and Turkish trade-companies range in the middle, while the grass-root actors are considered relatively (NGOs) or extremely (farmers, consumers) weak. Municipalities are also ranked among the weakest sector-participants.

Asking whom farmers are most likely to trust in the sector, certification companies again ranked highest. They were followed by NGOs and foreign trade-companies (which are often in charge of projects, and therefore in direct contact with most growers). The MARA only came after EU-institutions, at one level with universities. Consumers came last.

In this respect it may be interesting to know that, even though the EU enjoys a high level of integrity and is also considered a good source for funding, knowledge and cooperation (#19: 84.2% agree), not a single interviewee believed a Turkish membership in the EU would be necessary or helpful. A possible explanation for this inconsistency may be found in a seemingly high level of unawareness about the EU's activities in Turkey. My question concerning the advancements in connection to the mentioned EU-MARA project (#20) was left unanswered by 15.8% of all respondents, hinting at uncertainty among stakeholders about the EU's contributions to development in Turkey.

Whether the missing trust in the sector is due to insufficient structures (law, institutions, network among stakeholders), or a deeper lying cultural unwillingness to participate in cooperative action remained unclear throughout the interviews. The stakeholder-survey did not provide a satisfying answer to whether the first or the latter is closer to reality neither. With only slightly more respondents agreeing with the idea that the Turkish mentality per se is cooperation-unfriendly (#7), an answer is difficult to provide at this point. Against the theory that Turkish mentality is hindering cooperation goes that an overwhelming majority of all respondents (#4: 94.7%) agreed that incentives for cooperation were not sufficient, thereby rather pointing to missing structural prerequisites. *For* the idea speak a number of comments I received during my interviews:

“Peoples’ minds are not set for functioning cooperatives here in Turkey; if you want to succeed you do it on your own” (Stakeholder, Business sector), or

“In Turkey it is very difficult to find people that can cooperate; they will immediately try to compete” (Stakeholder, Civil Society).

Certain seems that neither the MARA, nor any other actor has managed to establish a well-functioning stakeholder-network, which would facilitate cooperation instead of solitary moves by varying stakeholders, yet. This was confirmed in numerous interviews as well as the stakeholder-survey (only 15% believed the creation of a stakeholder network has been successful, so far (see table 4, #6)).

Farmers’ Opinion about Problem Causes

Farmers, of course, have their reasons not to show sufficient enthusiasm and willingness to cooperate. Lack of idealism may be tracked back to the fact that living conditions for many small-scale farmers are precarious. Grant (2005) describes Turkish agriculture as low in productivity and in gross value added per person. According to him, average income is less than 40 % of the level for non-agricultural workers. Harris (2005) writes in an article for the Rodale Institute that *“a 2004 report commissioned by the EU is frank in its admission that farming is the sector most likely to suffer as a result of Turkey’s accession”*, and that the welfare-transfer from rural to urban areas is likely to proceed.

With the exception of project-bound organic farmers – which in general had confidence in their project’s future – my encounters with farmers taught me that they and their peers do not seem to have great hope for their profession’s future, either.

“[The] future for farming is very bad in Turkey.” (Farmer, Yeniköy),
“[...] middlemen take too high margins” (Stakeholder, Civil Society),
“Regular farmers [i.e.: inherited farm, no knowledge of a foreign language, insufficient network] have little to earn from organic agriculture” (Stakeholder, Business sector),
“For small, individual farmers it is almost impossible to convert, and economically only a god idea if direct distribution is possible” (Stakeholder, Business sector), or
“When the number of processors increased, the competition on the export market [happened] on the back of farmers” (Stakeholder, Academia).

In respect to company projects I received the remark:

“Yes, we were worried about the dependency [on the company], but what should we do?”
(Farmer, Gökkaya).

In other encounters with farmers they widely confirmed these findings, both in respect to the difficulties you have being an individual farmer and the big share of profits other parts of the distribution chain claim for themselves (Yeniköy, Gökkaya, Terme). The power-imbalances on the Turkish organic market gain weight with the information that – just like other stakeholders (#18) – farmers in majority consider the market as more important for their future than government subsidies. During the round table discussions with farmers, prices (both input and output) were claimed to be essential for the attractiveness of organic farming, followed by the need for information/education and controls/certifications (Kemalpaşa, Yeniköy).

It was mentioned that the MARA’s extension services are quite shallow, as the extension experts only possess little practical knowledge concerning organic farming (Terme). This not only seems to be true for knowledge-transfer, but also for knowledge-creation. 73.7% of all stakeholders participating in the survey believed that too little research

was conducted on OA in Turkey (#15), and 84.2% that research-results were poorly transferred into practice (#16). Stopes et al. (2007d) comment on this in the following way:

“Research means little to a producer unless the results are made available in an accessible way [...] Research must also be relevant to the key issues faced.” (Stopes et al., 2007d:28)

Even farmers identified the lack of trust between actors as a major shortcoming in the Turkish organic sector; here particularly between the producers and their companies. In a quite interesting constellation, the farmers usually claimed they had problems with companies about the height of premiums paid to them and said the companies were hard to trust, but similarly expressed their satisfaction with being part of a project. Farmers especially seem to appreciate the all-round support (including inputs, advice and infrastructure) company-projects usually offer (Kemalpaşa, Tekelioğlu, Gökkaya, Terme). They further admit that support and official recognition from public institutions has improved over the last couple of years (Kemalpaşa, Tekelioğlu, Terme). Nevertheless, farmers in general believe they are of little importance to the government:

“There are so many farmers in Turkey, and they are not important enough to the government” (Farmer, Tekelioğlu).

This adds to the overall impression I got that farmers underestimate their position and potential. Among others I was informed that it is unrealistic to expect farmers taking initiative, despite the knowledge that uniting forces may improve their situation (Yeniköy). They expressed the feeling that they lack the knowledge to be successful on their own (Gökkaya)²¹, and that it is practically impossible to be independent as organic farmer, or to unite as farmers, because of the unwillingness and incapability of their fellows to cooperate (Terme). Farmers saw self-organisation mostly as risky, costly and work-loaded (Yeniköy). Company projects on the other hand, despite the dependency on one powerful actor, appear to provide the leadership farmers feel safe under. Surprisingly, the organic farmers I talked to were for the better part in favour of more external control over their production, meaning to be closely linked to a strong market actor (Gökkaya). The strong focus on the market is further confirmed by the common notion not to expect more financial support from the government, but rather hope for functioning markets and the wish for better structured extension services and improved organisational infrastructure (Terme).

The Market as essential Factor

Stakeholders overwhelmingly blamed the lack of a sufficiently developed market to be the primary reason for insufficient dynamics in the Turkish organic sector. A very narrow choice of distribution channels, for the most part dominated by a few actors and difficult to enter as single farmer, combined with weak demand on the domestic market inhibit practically all direct contact between farmers and consumers. In my stakeholder-survey, 84.2% of respondents agreed that the Turkish domestic market for organic products is not well understood, and that more work would have to be done regarding target-groups and motives of consumption (#17). This resulted in a situation where demand is strong on the export market, but inaccessible for most small-scale farmers, unless with the help of middlemen or export companies.

The weak domestic demand is restricted to the major cities Istanbul, Ankara, Izmir, Antalya and Samsun. Again most farmers are too far from these agglomeration areas to be

²¹ According to practitioners, significant problems with a conversion to OA are fertilization (i.e. keeping yields up) and effective pest-control (Tekelioğlu).

independent of middlemen. Rural demand, which would offer a certain level of security for small farmers, is non-existent. Consequently, organic farmers are dependent on other market-participants in order to reach the end-consumer. Nonetheless, both farmers and stakeholders agreed (73.7%) on the superior importance of the market for the development of the sector over government subsidies (#18):

“Demand is very weak in Turkey. [We] thought demand would grow, but [our] shops don’t go as well as expected; [there is] no market-growth” (Stakeholder, Business Sector),

“[The] local market is very small [and] it might need a scare-story to wake consumers up” (ibid.),

“In the medium term – 10-15 years – [I have] no great expectations for [the] domestic market” (ibid.), or

“[Many] shops opened without knowledge of consumer demand [...]; they sold export products to [the] domestic market. No consumer loyalty can be built on [dried fruits]” (ibid.).

Farmers expected growing health-consciousness to be of increasing importance in the future (Tekelioglu, Yeniköy). A promising approach to solve the farmers’ dilemma is seen in the establishment of more farmers markets all over Turkey (Yeniköy); even though not practicable for all types of product.

Of all people I talked to, only one doubted the long-term potential of the Turkish domestic market for organic products. Otherwise, farmers, as well as other actors were convinced the local market would one day become a driving force behind the development of OA in Turkey.

What the Consumer Survey revealed

That the market for organic products is weak and not likely to “kick-off” any time soon is nothing the results from the consumer-survey would confirm. Rather, it indicates a pretty strong market demand (84.6 % of all respondents had already purchased organic food). Similarly, the results from my questionnaire indicate quite some market potential, given how high a share of the respondents want to buy more of their food from organic origin (80.8 %). Another 12.8 % wanted to do so, but indicated one or more obstacles. Those that wanted to buy organic food seemed not to have difficulties finding a source for organic products. Yet, the results certainly have to be treated with the demographics of the sample-population in mind²².

The consumer-interest in organic food largely exceeds the interest in farming itself; only 1/3 declared to be interested in agriculture, 39.7 % were ‘a little’ interested, and 26.9 % had no interest for agriculture whatsoever. This is in sharp contrast to how interviewees felt about the general importance of agriculture; 91 % thought of agriculture as ‘important for many people’. Likewise they thought agriculture was an important part of modern society (97.4 %).

Somewhat lower, but still largely positive (78.2 %) was the response to my question if they believed organic farmers provide important benefits to society and the environment. Then, of course, there seemed to be some insecurity about this question among consumers, with 11.5 % of all respondents choosing ‘I don’t know’ as an answer.

²² The survey population is not representative for the overall Turkish society, but rather a narrow group of consumers, characterized by above-average age and income.

In respect to the perception of organic production among the general public in Turkey, I was told both from the farmers’-, as well as other stakeholders’ side that it is mainly the health aspect that seems to attract consumers. This is in line with the survey-results, showing that consumers are most willing to pay a premium for food that benefits their health (79.5 %), followed by their concern for the preservation of the environment (69.2 %), support for small farmers (47.4 %) and least responsive to the idea to pay for the preservation of the countryside (41 %). Even though consumers themselves do not seem over-enthusiastic to financially subsidize small-scale farming, they recognize the difficulties producers have today. At least they overwhelmingly consider farming to have major problems in Turkey (84.6 %), and believe that the Turkish government currently is not doing enough for farmers in general (80.8 %), and that it should have a more active role in convincing conventional farmers to convert to organic production methods (91 %).

In a further attempt to better understand the motivations that lie behind the preferences of consumers, I wanted to know which factors are most influential to their decision to favour a product over another. The clear favourite was the factor ‘Quality’, with 88.5 % approval. Long after, but still appealing to a majority of stakeholders came the factor ‘Price’ (50 %), followed by ‘Environmental friendliness’ (34.6 %), ‘Origin’ (30.8 %), ‘Habits’ (16.7 %), ‘Appearance/Looks’ (14.1 %), ‘Social responsibility’ (12.8 %), ‘Convenience’ (12.8 %), ‘Recognition’ (5.1 %) and ‘Traditions’ (3.8 %).

Asked what they consider the societal duties of farming, consumers decided to rank the ‘safeguarding of food security’ as most important (87.2 %). Second came the ‘protection of the environment’ (65.4 %), to ‘provide safe income for the farmer’s family’ and to ‘generate economical growth’ (both 51.3 %). All the remaining alternatives gained less than 50 % support: ‘counteract global warming’ (44.9 %), ‘produce cheap food’ (28.2 %), ‘secure a beautiful, diverse countryside’ (24.4 %), ‘produce surpluses for export markets’ (20.5 %), ‘preserve traditions’ (16.7 %) and last ‘produce energy’ (11.5 %).

Even though I did not examine to what extent consumers know what organic farming means and how the certification system works, I wanted to know how much trust they have in this system. Only about half of all interviewees (52.6 %) had trust in the certificate an organic product carries. One stakeholder I met for an interview suggested that:

“At the moment there is a big trust issue on the domestic market. 90% of consumers do not know how the system works, have no idea how to differentiate between conventional and organic products and are not aware that certification is necessary to call a product ‘organic’.” (Stakeholder, Business sector)

It seemed that Turkish consumers – or, more precisely, the population sample represented in my survey – were slightly more positive towards the EU’s role in Turkish agriculture than other stakeholders; after all 59 % believed the sector would change through an eventual membership in the EU (20.5 % ‘No-answers’), and 52.6 % thought that farming in the EU was more environmentally friendly than in Turkey. (Only 17.9 % considered Turkish agriculture to be better in terms of environmental protection than the EU.)

In a very interesting interview with Ekin Taskin from the AEA, discussing mainly market- and organisational issues, I was informed that the problem with the domestic market was that, in contrast to the export market, one has to track needs and study target groups.

Thus, it is much harder to succeed on a BtoC²³-market compared to a BtoB²⁴-market. Taskin further explained that the organic sector in Turkey is not an industry itself, but rather a link in other European countries' production chain; and thereby easily exchangeable.

Even though Turkish stakeholders of the organic sector do not seem worried to be out-competed by other developing countries with favourable conditions for organic production (#9: 52.6 % disagree), Schayes (2001) claims that such a threat can be identified as the former communist countries in Eastern Europe and China; and Prof. Uygun Aksoy (pers. comm.) from Ege University explained that:

“Turkey is a good example for a country that only provides input to the system and is easily replaceable by another producer if conditions change and become more competitive in another region of the world.”

Possible Solutions

In the stakeholder-questionnaire, I asked participants to rank five proposed problems according to their severity. The outcome was as follows (1-most severe; 5-least severe):

1. *“Many promising initiatives and projects are started to help organic farming, but are then not supported to guarantee their long-term survival and success.”*
2. *“The sector is organized in a top-down approach, and there is an almost complete absence of a functioning grass-root movement.”*
3. *“Cooperation and coordination among actors in the organic sector is weak.”*
4. *“At the moment there is no leader (person, institution) to guide the organic sector in Turkey.”*
5. *“Actors in the organic sector in Turkey do not trust each other sufficiently.”*

In a further step, I wanted stakeholders to choose from a list of five proposed areas-of-concern, and decide which of these were most urgent to tackle in order to improve the sector's performance (1-most important; 5-least important):

1. *Domestic market*
2. *Farmers' education/extension services*
3. *Cooperation/Coordination among stakeholders*
4. *Legislative/laws concerning organic agriculture*
5. *Organisational structure*

I finally came up with some proposals to improve the farmers' situation, of which I wanted to know how practicable these ideas seemed to stakeholders (table 6).

Table 6: Proposed activities to improve the Turkish organic sector (all numbers represent percentage values)

<i>Do you agree or disagree to the following statements?</i>	Agree	Disagree	No answer
1. The Turkish government should officially declare support and guarantee the long-term potential for organic agriculture in Turkey.	84.2	15.8	-

²³ Business-to-Consumer

²⁴ Business-to-Business

2. Farmers need an institution they trust and can always refer to if they feel they need advice.	94.7	5.3	-
3. The government has to link rural development to organic agriculture.	89.5	5.3	5.3
4. Various public and private institutions should act as “market makers” to improve the possibilities for individual farmers to sell their products.	84.2	10.5	5.3
5. The conversion period needs special attention from MARA’s side.	57.9	26.3	15.8
6. The EU should become a more active role in the Turkish organic sector as financer, advisor and cooperation partner.	73.7	15.8	10.5

Approval to suggestions 1, 2 and 3 did not come as a surprise. Already in many interviews I had been informed that more government support would be necessary to strengthen the organic sector in general, and farmers in particular. Stakeholders were at variance about whether such governmental support should incorporate financial aid. While some stressed the fact that in Europe heavy public support had contributed to a quickly growing sector and was an important stimulus for conventional farmers to convert to OA, others suggested it would be better to avoid such a dependency on public funds in Turkey. Government representatives from various institutions also mentioned the constraint that the Republic of Turkey simply was unable to generously hand out subsidies.

In terms of RD and OA, at least, the EU-MARA-project EUROPEAID/121154/D/SV/TR stresses that significant potential exists to use EU RD-funds to support development of the organic food and farming sector. The authors further recommend making full use of the instruments available to support organic farming within the Rural Development Program. According to Redman (2007), the EU co-financed IPARD Plan for Turkey 2007-2013 is a logically formulated document that offers significant potential, even though support for organic farming is not an explicit objective of the plan. The report informs that there are many good existing initiatives in Turkey, but overall these initiatives appear to be poorly integrated and with no overall strategic framework. It is suggested that a more pronounced role of organic farming is included in the draft of the next (4th) IPARD Plan.

During my interviews, even though stakeholders would not bring up RD on their own, asked if they considered RD and OA a “matching pair”, responses were always positive. I further heard that the connection between RD and OF had not been established yet on the government level.

Very clear was the necessity for the MARA to become a more active player in the field of OA. The range of measurements stakeholders and farmers anticipated stretched from cheap certification for individual farmers, over the establishment of an accredited laboratory, increased controls and stricter regulations, the distribution of information and better extension services, to a more active engagement as leader/driving force of the sector.

In respect to suggestion #4, the question how much the MARA should try to interfere with the market was controversial. It was rather clear that both, more diverse distribution channels for farmers had to be found, and prices of organic food for the end consumer had to

come down. On the other hand, stakeholders' opinion differed whether engagement of supermarkets in the retail of organic products is to be welcomed. Some believed that:

"Selling through conventional channels [doesn't] make sense for organic agriculture" (Stakeholder, Business sector), or that

"Some kind of farm-shops should be established instead of pushing [demand] via supermarkets". (Stakeholder, Business sector).

The idea to establish more bazaars like the ones in Sisli-Istanbul, Cankaya-Ankara or Samsun was generally embraced; some suggesting municipalities should push such a development, others turning to NGOs like Buğday or ETO. In general, cooperation between local officials and NGOs was considered most promising. Surprising was a remark, saying that it would eventually need a 'scare-story' in the Turkish food-sector to trigger interest in organic food²⁵. This was considered possible, given the low quality standards in conventional food production. The – as stakeholders claimed – weak controls and hence varying product quality of conventional food was named as potential advantage for organic farming, while harder controls for the organic sector were wished for. Even though the AAPT Dept. itself did not consider it a practicable solution to put pressure on farmers to convert, several stakeholders favoured a (temporarily) stricter hand from the ministry, as they assumed this would increase trust among the actors of the organic sector.

The stakeholders' response to questions 5 and 6 were unexpected. The fact that only 57.9 % supported the idea to demand active support for the conversion period from the MARA came as a surprise. During my interviews consensus was large, both in terms of the difficulty the conversion presents to many small-scale farmers, and that active support for this initial period would be essential.

Finally, question 6 reveals that, after all, the EU seems to be appreciated as a partner. This was not what I was told in face-to-face meetings with stakeholders or farmers. Rather, the EU was pictured as insignificant for the sector's success. A EU membership would not make much difference, I was told. It was even suggested that more EU-influence would mean that small-scale farmers would risk to be pushed towards giving up farming²⁶.

In respect to the often wished for campaigning addressing consumers and the broader public in order to educate and establish trust, Ekin Taskin (pers. comm.) from the AEA believed target-group oriented communication was necessary to strengthen the domestic market. To strengthen cooperation in the sector, he was further suggesting the establishment of a cluster, integrating the sector both horizontally and vertically.

In another interview, Nimet Sanda (pers. comm.) from the *Agriculture and Agricultural Industry Workers Union of Turkey* (Tarım İş Müdürlüğü) suggested the government should decide on one or two typical products for each region of Turkey and support the organic production of these. This would facilitate the process of building up a 'unique selling proposition' and increase the chances to find markets for these distinct products.

²⁵ Repeatedly, I was told that consumer demand on the domestic market is weak because of missing consciousness among the general public. A scandal from the conventional front, it was anticipated, would trigger growing interest in organic farming.

²⁶ Those fearing EU-membership receive support from Harris (2005), who writes in an article for the Rodale Institute that "a 2004 report commissioned by the EU is frank in its admission that farming is the sector most likely to suffer as a result of Turkey's accession", and that the welfare-transfer from rural to urban areas is likely to proceed.

Finally, Dr. Ali Kemal Ayan (pers. comm.) from the 19 Mayıs University named his ideas for the sector, including the broadening of local initiatives such as in Samsun (successfully initiated by Buğday and the Municipality of Samsun), the foundation of product-specific unions or associations, the application of organic farming in water-protection areas, the support for tourism initiatives in connection to organic farming (TaTuTa), consumer-promotion and the development of strategies for OA, both locally and nationally.

It is criticised that the MARA is not more outspoken about a positive long-term perspective of OA in Turkey. In order to relieve the anxiety about the risks connected to a conversion to organic farming methods among some farmers, it is assumed that a clear standpoint of the ministry in favour of OA in Turkey would help.

In another matter, stakeholders articulated doubts about the MARA-internal relevance of the AAPT Dept. Stopes et al. (2007) conclude that competences are too outspread among various governmental institutions and coordination challenging. In respect to the governmental extension services, executed through the 81 MARA Provincial Directorates doubts about this service's efficiency were raised; not in respect to the friendly relationship between government officials and locals, but rather the specialist knowledge in respect to organic farming.

Prominently represented in my interviews were also the two NGOs Buğday Association and ETO, of which ETO's role was more controversial. The latter was considered influential, but less and less effective in its attempts to promote organic farming in Turkey. This concern was not only expressed by outsiders to the organisation, but also Atila Ertem (pers. comm.), the head of Rapunzel Turkey and current chairperson of ETO. As he explained, the beginnings of ETO were marked by lack of members and money to pay for independent infrastructure²⁷. Then, 6 years after its foundation, ETO stopped functioning altogether, which, in 2006, led to an attempt to revitalize the NGO. Since then, ETO is equipped with full time staff to deal with daily business, receives better appearance on the web, and started to engage in national and international projects. Five committees inside ETO were created to better suit its objectives, and a branch in Adana was established, with more branches in planning in Istanbul and other cities.

Of course, the recent reorganisation inside ETO may soon change other stakeholders' view on the NGO. So far, though, the existence of ETO did not prevent suggestions that Turkey terribly needs a farmers' organisation that worthily fights for organic farmers' interests; preferably initiated by farmers themselves. Others imagined the establishment of several more associations in the style of ETO, which would work product-specific. As another option, cooperatives among producers were named.

According to one stakeholder it was rather easy to unite under a cooperative for farmers, provided they produce a homogeneous product like roses, nuts, tea or apricots. More heterogeneous agricultural products, such as olives, would be hard to organize as a cooperative, though. There is also some scepticism remaining about the legislative preconditions for cooperatives. Farmers in Yeniköy-village considered buying- and selling-cooperatives to increase their market-power a good idea, but remained very sceptical about processing/refining-coops, which they considered too risky. Farmers from Gökkaya-village even expressed their desire for a project in which they were nothing more than subcontractors, while the company organizing the project should take care of inputs, extension service, etc. As one farmer expressed it:

“It's easier to sell to a company than to be out there on your own.” (Farmer, Gökkaya)

²⁷ In its foundation phase, ETO was therefore accommodated in facilities belonging to EGE University in Izmir.

They turned out to be open towards contracted production, but sceptical about profit-driven companies, which they claimed could not be trusted.

Finally, most stakeholders agreed on the importance of increased research-efforts and the necessity to provide appropriate research-infrastructure (for ex. accredited laboratories)²⁸:

“The capacity of Turkish laboratories has been increased, although use of these facilities by the organic sector in Turkey is limited, with laboratories in EU member states providing the bulk of the analysis required by control and certification bodies and organic businesses”,
“Many of the control and certification bodies use laboratories of European member states where the prices and services are claimed to be better than in Turkey”, and
“Further and more comprehensive evaluation of the organic research effort in Turkey should be carried out.” (all three statements: Stopes et al., 2007)

²⁸ Recently, the MARA has initiated a research and development program for OA, carried out at 29 research institutes all over Turkey, and covering a wide range of agricultural topics (Stopes et al., 2007b).

DISCUSSION

Repeatedly throughout this thesis, I stress the particular importance I attribute to farmers. They are considered the most important of all stakeholders. Only if their significance is sufficiently accounted for, is the development of a sustainable Turkish organic sector achievable, I hypothesise.

In this light, it has to be considered problematic that, so far, farmers have not been put into the spotlight of the organic sector. While other parts of the sector are rather well organized, farmers lack any noteworthy network. Therewith comes a weak bargaining position in the struggle to distribute profits generated in the organic sector. My own, as well as other's research has shown that farmers are risk averse. As long as conversion to organic farming is accompanied with so many challenges, uncertainties and insecurities, it is unrealistic to expect growing interest among conventional farmers for organic methods.

With this risk aversion in mind, it must be concluded that increased interest for organic production techniques first requires stability and planning security. As long as it remains unclear how economically viable a conversion to organic farming is in the long run, farmers hesitating to switch to organic production techniques act perfectly rational. Currently, in Turkey, company projects seem to be the only choice providing these preconditions. The farmers I interviewed therefore largely favoured such projects. At the same time, the sector remains rather narrow this way, resulting in a high level of dependency for organic farmers. In case of disputes, farmers only have few options to find alternative partners instead of the project-company they are affiliated to.

To solve this dilemma, my research clearly showed the necessity for further extension services offered to farmers, and the development of additional market distribution channels. Such should result in higher profits for organic farmers and bring along improved planning security. If organic farming is enforced correctly, higher economic profits with less environmental impact is achievable (Engindeniz & Tüzel, 2006; Tüzel et al., 2004)²⁹.

Success in organic farming depends on how well growers manage the crop and can make the right decisions at the right time. They therefore have to be trained to become more professional. Only then can pests- and diseases management in organic production be accomplished successfully. Close monitoring and quick response seem to be the key factors in achieving success. Thus, focusing on farmers' knowledge levels is one of the most effective strategies geared to support RD, and conserving and restoring natural resources (see 'Theory – Sustainable Agriculture and Rural Development'). Stopes & Ananias (2006) suggest the establishment of a Learning Centre Network (LCN) to achieve the required knowledge-level among farmers. Such, of course, would require an increase in well-qualified MARA-personnel (advisors, trainers, inspectors, certifiers), at the moment criticised for shallow knowledge and high fluctuation.

Government Institutions

Even though the sector's future certainly depends on all the sector's participants, the data I collected implies that the MARA will play the most prominent role in the foreseeable future. Because of its legally assigned power, and the importance of hierarchies in Turkey, the ministry's performance will determine the success of OA in Turkey to a considerable degree.

Very important seems to be the establishment of a long-term perspective for organic farming in Turkey. A clear move from the government's side should comfort farmers

²⁹ The literature I refer to was focusing on cucumber production, and found explanation for its conclusions in reduced chemical inputs and lower initial- and operating costs.

hesitating to engage in organic farming because of uncertainties about the sector's future. As long as political uncertainty over the government's long-term agricultural strategy in respect to OA persists, brave moves from farmers remain unlikely (see 'Theory – External Pressure').

Also, OA has to be rewarded a more prominent role in respect to RD efforts. OA must be understood as a tool to ease the pressure arising from rapid urbanisation, strengthen rural communities and create jobs. The EU already provides substantial funding opportunities in this respect (IPARD), and the MARA would be well advised to seek a more efficient use of these funds. Of course, this would mean a profound reorganisation of current RD and OA efforts. Initiatives between the two fields have to be coordinated, and both deserve a more prominent role in overall Turkish development policies. So far, though, it seems to be the case that only few stakeholders sufficiently recognize the possibilities the EU-accession process comprises. Whether in respect to OA and RD, or OA and environmental protection, neither officials nor the civil society have yet recognized the EU as potential financial, educational or business partner.

The MARA – from basically ignoring the sector some 15 years ago – has in recent years developed into a respected partner for the organic movement and managed to earn some credibility among stakeholders and farmers. The fact that institutionalization of OA has been initiated must be welcomed. As a next necessity in the institutionalisation process of OA, those institutions dealing with organic farming need more power, and organic farming has to be awarded a more pronounced role in policy making; not only restricted to the narrow field of farming-matters. If the AAPT Dept. is supposed to fulfil its given role as a trustworthy partner for the civil society, it must also possess the necessary authority.

Furthermore, it must be assured that implementation-deficits are eliminated. It can only be considered a terrible waste of resources to plan and initiate campaigns, projects, or networks and then fail to make sure work is finished and followed up. From my research I conclude that there is no shortage of promising initiatives in the sector. However, results point at sloppy implementation and follow-up work. Examples I collected during my work are the poor maintenance of the *Organic Agriculture for Turkey*-homepage³⁰, or to slow advancement in attempts to achieve 3rd country status. Future goals like the implementation of the TOFFAP and combined efforts for RD will serve as an indicator for improved implementation capacity (Selvi, 2007; Stopes & Ananias, 2006, Stopes et al., 2007; Stopes et al., 2007b; Stopes et al. 2007c; Stopes & Kolatan, 2007).

Successful implementation of announced initiatives will also contribute to increased trust among stakeholders in the sector; thereby eliminating another major constraint the sector has to deal with: the issue of trust and the difficulties to coordinate the sector. Presently, excessive top-heaviness of the sector, combined with the inexistence of any bottom-up network (consequently leading to a huge power-imbalance between actors), and insecurity concerning motives and goals of the dominating actors in the sector, hinder the emergence of trust between the actors.

To overcome the trust-issue it has to be assured that all stakeholders know the system works. This will require both, stricter rules and controls, as well as campaigning from the MARA's side to educate the broader public about the efforts taken to ensure the promises organic farming gives. Such intensification of controls will, of course, require stronger

³⁰ <http://www.organiktarimturkiye.org/>; Even though the MARA claims to understand the value of the website as information source for many stakeholders and common platform among all target groups (Selvi, 2007), the homepage is not maintained very well (last update 2007-10-15). When I, myself, tried repeatedly to contact the homepage-responsible through the contact details provided on the homepage, I never got an answer. In this light, the statement that "the internet has priority over all communication ways [...] because of having a huge amount of data and information and diversity of users" (ibid.) becomes noncredible.

institutionalization and clearly assigned authorities. To remind the reader of Westerlund's 'three filter approach' (see 'Theory – Externalities'), it is unlikely consumers will accept higher costs for organic produce if they feel unsure about the trustworthiness of organic certificates. To assure trust from the consumers' side, as well as among actors in the sector, the 'three filter system' necessitates legal back-up, both in respect to implementation and execution of any initiative to support organic farming and farmers, regardless of ethical or economical incentives incorporated in the attempt.

Naturally, not only the ministry has a responsibility to act. Also, the help of municipalities should be sought after. In terms of conversion-support examples from Izmir and Samsun should be studied, where municipalities worked together with universities and other actors to create a bold attempt to establish local networks, farmers can rely upon. These provide permanent help, as well as public leadership and market stimulus³¹.

Judging from my interviews, I consider it unrealistic to expect the Turkish government to generously extend financial aid to organic farmers. Budget constraints seem to prohibit such. Instead, those possessing enough power need to create incentives for the sector to cooperate and provide the necessary information to activate all stakeholders. First and foremost the government should try to act as a "back-bone" for the sector, thereby providing the base on which an independent and grass-root driven sector can flourish upon.

Financial aid could be replaced with well-functioning all-round support for farmers, provided by public institutions:

"Under the assumption that yields in organic farming can remain on the same level as in conventional farming, if you apply modern techniques, farmers should be advised do convert to organic farming even without a market. The conversion would be economically profitable, because input costs in organic farming are comparably smaller and if yields do not decline, the farmer can save money by applying organic methods. The precondition is that the individual farmer is trained well enough and gets enough advice, so that he actually manages to keep yields on the same level as in conventional farming. This means they have to be taken care of very well by a public or private institution. Once the domestic market for organic products is big enough, these already experienced farmers could get an organic certificate and quickly succeed as certified organic farmers."

... is what I suggested in the stakeholder survey. Originating from the information that, in developing countries like Turkey, the application of organic farming methods would – if professionally done – not reduce yields, but rather increase them, I was interested to see

³¹ In concrete, projects could look like in Izmir, where the necessity to protect water quality in the catchment area for a drinking-water reservoir was turned into a chance to make organic farming more attractive. Through active engagement from the city's side, the threat of stricter regulations in respect to fertilizer and pesticide use in the area was turned into an opportunity for farmers. With 18 similar drinking-water protection zones all over Turkey, OA could easily be turned into the preferred mean to protect natural resources. This would require the same strict application of rules on water-protection as in Izmir. Organic farming could be declared the "preferred management option" for drinking-water areas and environmentally sensitive areas.

Also from Izmir comes an example for how coherent work from the municipality's side with the farmer's best interest in mind can look like. The municipality there established an office for organic farming and well-trained staff, constantly at reach for farmers seeking advice. Together with the AEA, which is currently working on the establishment of an organic cluster with the goal to integrate the sector both horizontally and vertically (Taskin, pers. comm.), Izmir thereby tries to ease the mentioned risk problem.

From Istanbul comes the example of the bread factory IHE (*Istanbul Halk Ekmek*), which, in 2006, initiated a RD project in Eastern Anatolia, contracting poor farmers to grow organic wheat, which would then be processed and sold in Istanbul. The idea here was to prevent migration to the mega-city Istanbul by improving the living conditions in the native region of potential migrants (Demiryürek et al., 2008).

how interviewees look upon such a suggestion. Out of 20 respondents to the questionnaire, 19 considered the idea practicable. Yet, it must not be forgotten that farmers possess low management skills, and that Turkey is short of advisers, which makes such an idea less likely to quickly show results.

The Market

Farmers, stakeholders and consumers all largely agree upon the market's outstanding role to guarantee economical profitability in the Turkish organic sector, and the government shares their view:

“The prospects for organic food and farming in Turkey depend on more than production opportunities. The market-specific actions contained in this document [i.e. EuropeAid/121154/D/SV/TR: Turkey Organic Food & Farming Action Plan] remind us that growth in organics must be market-led – in Turkey as well as for export markets.” (Mehdi Eker³² in: Bagatur et al., 2007)

Presently, economic success in OA depends exclusively on the export market, and major changes are not to be expected any time soon. What's more, the export market seems to be a reliable partner for OA in Turkey and will provide growth for the predictable future to come. Even though farmers are not in an ideal situation here, as the complexity resulting from the necessity to export makes it almost impossible for individual farmers to convert to OA, and simultaneously exposes farmers to considerable dependency on export companies, there is certainly further potential on the export side.

For the future, a more distinct 'unique-selling-proposition' should be aimed for. Nimet Sanda (pers. comm.), and Kenanoglu & Karahan (2002) both suggest to focus on only a few traditional products per production region, and to actively promote these. Thereby Turkey should be able to distinguish itself from other countries, and strengthen its reputation for local specialities and OA.

Turning to the domestic market, its short-term potential was overrated in the past, and various problems remain unsolved (logistics, market channels, communication and extension services, support to farmers, institutionalisation, etc). My research showed that there is considerable work left to do before any major improvement on the domestic market can be anticipated. To succeed on the domestic market, expansion of the already existing business is not enough, but new ways of organisation have to be found. The difference whether dealing with long-lasting (dried, bottled) bulk products for the export market, and small(er) quantities of a great variety of fresh products must not be neglected. Engindeniz & Tüzel (2006) state the following in this respect:

“Growers must harvest, pack, and market their products in an expedient manner to receive satisfactory returns. Therefore, we can say that from a marketing perspective, vegetables carry greater risks than storable commodities like nuts and grains. [The market is] extremely competitive and returns to growers are dictated by factors like total supply, consumer demand, and the available organic outlets. Market saturation often occurs. Growers may then be forced to accept lower returns and/or market their product without the organic designation at price of conventional corps.”

³² Turkish Minister for Agriculture and Rural Affairs

More sophisticated logistics are required for the domestic market to thrive; or markets must become more local in order for small farmers to succeed. So far, domestic demand is concentrating in urban areas. Surely, it would be desirable to trigger demand for organically grown produce even in rural areas. Yet, until now, there is no coordinated action to support consumer promotion of organic food in Turkey. Many organic producers are working on a small scale and have not yet established a sales network because of the high operation costs. Therefore, they have difficulties reaching the consumers.

Concrete actions to support the domestic market should focus on two areas of concern: ‘distribution channels/marketing’ and ‘education/campaigning’. Buğday’s organic farmers markets, for instance, clearly meets consumer-preferences better than most other distribution channels for organic products; at the same time constituting an additional option for farmers to sell their produce; thus satisfying both, consumers and producers. Even though not indefinitely reproducible, there certainly is further potential for such markets. To make sure both farmers and consumers engage on such markets in a win-win situation, the MARA could decide on general bazaar standards. Such action could assure a minimum level of quality and make sure prices do not exceed an acceptable level, thereby contributing to trust between farmers and consumers. NGOs (mainly Buğday, but also ETO) have already collected considerable knowledge about the successful organisation of such markets, which makes them perfect cooperation partners for the ministry. If successful, the concept of direct distribution could – with the help of the MARA, NGOs and the business sector – be extended to permanent organic food stores, selling locally produced food, making the participation of middlemen obsolete. The “order of the day” for the MARA (and its associates) therefore is to act as additional force on the market, trying to establish more direct distribution possibilities for farmers, and bringing market prices down for consumers.

The bottom line is that the domestic and the export market depend on each other to trigger mutual growth. As Prof. Dr. Kürsat Demiryürek (pers. comm.) from 19 Mayıs University in Samsun explained, future success on the export market is linked to an improved domestic market, as the diversification of production triggered by strong local markets also considerably improves chances to succeed internationally. Furthermore, a lively domestic market reduces the risk today’s export dependency brings along for Turkey. Interview-partners from EGE University and the AEA pictured the organic sector in Turkey as a chain in the production process of the European market, rather than a healthy industry itself, meaning that everything in the Turkish organic sector comes and stands with European companies. In case of withdrawal, a big share of the sector would simply vanish.

Under ‘Theory – Sustainable Agriculture and Rural Development’ the reader is presented with a study by Brodt et al. (2006), which reveals that local small-scale farming is ideal to promote RD. This, of course, is only the case for regionally adapted diverse production, supplying local markets. Remembering that Brodt et al. remark that, for their area-of-study, the major problem in respect to sustainability and OA lies in the heavy export-orientation of most producers there, and in the light of a very similar situation in organic farming in Turkey, the importance of the development of a decent domestic Turkish market cannot be underestimated.

The MARA and other actors should try to push the market in a way that enables growth and redirects a bigger part of the profits to the farmer; this combined with intensive education/extension efforts.

Concerning the current structure of export-oriented organic production, the MARA, together with the civil society, has to make sure that farmers are sufficiently informed about market developments, and that they are backed by more powerful organisations to guarantee their rights. As long as fairness can be guaranteed in the existing company-project structure, I

do not see a reason to enforce any changes in this respect. If possible, the MARA could try to establish additional projects, in which the ministry acts as leading institution and establishes the necessary hierarchical structures. Such projects could be combining organic farming with other issues of major concern like water protection, RD or environmental protection.

A decisive role for the successful development of the domestic market logically lies on the Turkish consumers. The results of my study show that awareness for organic food among the Turkish public has successfully been raised. Especially its reputation for being healthy is of great value. Clearly, Turkish consumers are more concerned about their own health than the environment, the farmer's situation or rural landscapes.

So far, Turkey is lacking sufficient knowledge about target-groups for organic produce. As it is today, there is a lack of knowledge about the motives of organic consumption in Turkey. Referring to Ekin Taskin from the AEA (pers. comm.), only if you know your target group, can you promote organic food with success. Certainly, today the wider public cannot be expected to quickly adapt the habit to shop organically. Particular target groups (wealthy consumers, families with babies, educated consumers), though, are more likely to do so. Therefore the research sector deserves more attention when it comes to establishing new knowledge and how to implement gathered knowledge. Universities and other knowledge creating or distributing actors should be awarded a stronger role in the creation of a sustainable organic sector.

The Grass-root

The importance of rewarding farmers a more prominent role in the organic sector is undeniable. Farmers, which turned out to be the “weak link” in the sector, deserve permanent support and active lobbying. In the long run, the emergence of a dynamic organic network is indispensable. To establish a such, some “ideology building” – next to assuring economic viability – could be helpful. Momentarily, the sector's structure is almost exclusively economically driven. Even though I am not suggesting rational planning should give way to ideologically motivated decisions, I do believe that some more emotional affiliation to the sector and its ideas would definitely spur long-term commitment. In an exclusively profit-driven sector the risk for abrupt moves in and out of OA seems more likely. I assume that, in order to succeed in the long run, the sector needs stability and committed participants. Stronger ideological motivation would guarantee a higher loyalty to the organic movement, and consequently more farmers actively engaging in the sector's improvement. Through professional education- and extension services, integrating a social and environmental dimension, a stronger psychological bond between the farmer and the practiced production method could be achieved. Furthermore, in case of external pressure on conversion-willing farmers to stick to conventional methods coming from their peers (see ‘Theory – External Pressure’), a counterbalancing organic network would make it easier for farmers to overcome such social hindrances.

A first step towards a more active network of this kind would be to unite and strengthen existing organic farmers. Repeatedly during my interviews, stakeholders pleaded for prioritising such, rather than aiming at quickly motivating new farmers to join organic farming. Only if those already active in the sector are satisfied with their performance can the sector thrive in the long run.

Even though suggesting that the sector should generally flourish on market demand and increased education efforts, I conclude – in line with Kenanoglu & Karahan (2002) – that financial aid for conversion and certification would be desirable. The suggestion to financially support the certification process of individual farms derives from the knowledge that, so far,

farmers are too dependent on companies possessing the rights to the certificates they are working with. Even though only relevant in the long run, I assume a sustainable organic sector can only evolve from farmers working independently and flexible. Farmers who have the feeling they are not actually in charge of their own destiny, but rather part of a system they have no influence upon, are more likely to suffer from frustration and resignation (see ‘Theory – External Pressure’).

It is also clear that, as long as externalities affecting different production systems’ real costs and benefits persist, the government cannot be allowed *not* to interfere with the market at all. Given the economically tight conditions of many small-scale farmers, of all the options to even out externalities, the “carrot approach” (subsidies and institutional support) seems more suitable than “the stick” (environmental taxes) (see ‘Theory – Sustainable Agriculture and Rural Development’).

Whatever is done to improve organic farmers’ position and the surrounding sector in Turkey, it must be kept in mind that patience will be needed before results can be witnessed.

CONCLUSIONS

Obviously, the situation OA is facing in Turkey is challenging. Exceptional natural preconditions and a rather well established organic business-sector contrast with a low level of cooperation among stakeholders and weak MARA-leadership. From my analysis I can further conclude that, among all stakeholders, farmers are worst off in the current constellation. They are lacking power, institutional support and knowledge to safeguard their share of the profits generated in the organic sector. To me it almost seemed as if farmers had accepted their role as weakest player in the field. If major improvements are sighted for, all actors will have to contribute to a bright(er) “organic future” for Turkey’s agricultural sector. Certainly, the simple farmer has to move into the spotlight of all activity. There are hints that, so far, this most numerous group of participants in the organic sector has been treated stepmotherly. Rooted in the export-oriented origins of the organic sector in Turkey, and amplified by low level of engagement from the farmers’ side, the sector’s persisting top-down approach represents a considerable obstacle to sustainable growth (not only economical) in the Turkish organic sector. The core of the problem therefore seems to derive from the inactive farmers corps and poor institutional structures in the sector. The sector heavily relies on a few dominant players, which, in a top-down approach, lead the sector. A dynamic that would allow for various initiatives, creating a diverse and innovative movement, is missing.

In order for a functioning and active grass-root movement to “take over”, a broad range of tools will have to be applied, repeatedly adjusted to the needs of the grass-root movement. Such a development surely needs time, but it requires action now.

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Tables and Figures

Table 1: EC (2006): Farm size distribution in Turkish agriculture (in % of total farms)

Table 2: EC Directorate-General for Agriculture (2003): Development of urban and rural population in Turkey between 1927-2002 (modified)

Table 3: Demographic description of consumer sample-population

Table 4: Stakeholder view on progress in the suggested measurements by EU-MARA-project EUROPEAID/121154/D/SV/TR (all numbers represent percentage values)

Table 5: Proposed explanations for problems in the Turkish organic sector (all numbers represent percentage values) (all numbers represent percentage values)

Table 6: Proposed activities to improve the Turkish organic sector (all numbers represent percentage values)

Figure 1: Wikimedia Commons: *Map of Turkey, stressing regional subdivision*. From: http://commons.wikimedia.org/wiki/File:Turkey_Regions_map-en.svg

Figure 2: EC: *Map of Turkey, highlighting major cities neighbouring countries and important water bodies*. From: http://ec.europa.eu/enlargement/candidate-countries/turkey/index_en.htm

Appendix 1: Farmers-workshops

Workshops with local farmers for CASE STUDY in Izmir

one-day workshop 9 a.m. – 4 p.m. (one hour lunch break – food and drinks served for free)
7-10 participants

3 methods (Nominal Group Technique, Problem Tree, Venn Diagram)

*I present my translator (who will be in charge during the exercises) and myself (in Turkish).
In case the participants do not know each other – everybody presents him-/herself shortly*

1) NOMINAL GROUP TECHNIQUE³³

Goal: generate and discuss major problems participants (i.e. the farmers) have to deal with

Procedure: participants first generate possible solutions on their own and write them down on a piece of paper (without discussing their ideas);
then: ‘Round-Robin reporting’ of ideas in which everybody reports for the others which ideas he/she came up with;
then: discussion;
finally: attempt to rank ideas together, according to their importance

I hope to understand the most urgent problems/challenges locals have to deal with.

all participants works together;
duration: 2 – 2,5 h

LUNCH BREAK (food and drinks for free)

2) PROBLEMTREE³⁴ – *shortened version*

Problem: Why do farmers hesitate to convert to organic farming?

Procedure: Problem- & Solution-tree will be united to one (leaving out category ‘Effects’)

Tree as following: Causes – Problem (as stated above) – Solutions
Problem is research question – why don’t more farmers convert

I hope to generate a variety of causes and solutions that reflect the (conventional and organic) farmers’ situation in respect to the research question in the case-study area

all participants work together;
duration: 1-1,5 h

3) VENN DIAGRAM¹

Goal: to generate a diagram about the farmers’ view on the network the farm acts in and relations/dependencies a farm has to deal with, including power structures.

³³ from: Pretty et al. (1995): A Trainer’s Guide for Participatory Learning and Action. IIED publications, London, United Kingdom. ISBN: 1 899825 00 2

³⁴ from: Eksvärd K.: Tillsammans kan vi lära och förändra – deltagardriven forskning för svenskt lantbruk. CUL, SLU, Box 7047, Uppsala, Sweden. ISBN: 91-576-6554-0

Procedure: participants work together to draw a diagram reflecting actors/relations they deal with, their importance/power and how far/close they are to their farms

I hope not only to activate the participants, but also to make them think about all the actors involved to, then, have a better overview over the situation when the problem is discussed; for me, it is important to understand all dependencies the farmers have to deal with

2-3 groups with 3-4 participants each;
duration: 1 h

END OF SESSION

Important to find out beforehand:

Do the farmers know each other?

Do I need a facilitator³⁵ or is an “assistant”, speaking Turkish, enough?

Additionally

Individual TRANSECT WALK³⁶ (likely on my own, just to get to know the area – if time)
SEMISTRUCTURED INTERVIEWS with (some) farmers before and after the workshop (if time)

³⁵ A facilitator’s task would be to guide the participants through the actual workshop and lead discussions/exercises. I would discuss the procedure with him/her before and after the workshops and consult on uncertainties during the process. Otherwise I could observe and take notes.

³⁶ The idea is to walk the area in order to get a picture of the local conditions and a feeling for the site

Appendix 2: Consumer survey – questionnaire (English original; then translated into Turkish)

QUESTIONNAIRE – Farming in Turkey

Throughout the entire questionnaire I am interested in your opinion, attitude and knowledge. There is no right or wrong in answering the questions!

Off course, all data are anonymous and will only be used for my thesis!

Thank you very much for your participation!

1. Which factors are most important for you when you purchase food? (multiple answers possible)

- | | |
|---|---|
| <input type="checkbox"/> Quality | <input type="checkbox"/> Social responsibility |
| <input type="checkbox"/> Price | <input type="checkbox"/> Environmental friendliness |
| <input type="checkbox"/> Origin | <input type="checkbox"/> Recognition |
| <input type="checkbox"/> Convenience | <input type="checkbox"/> Habits |
| <input type="checkbox"/> Appearance/looks | <input type="checkbox"/> Traditions |
| <input type="checkbox"/> Else _____ | |

2. Generally speaking, are you interested in agriculture?

- | | |
|-----------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> A little | |

3. Do you think that agriculture is an important issue for many people?

- | | |
|-----------------------------------|-----------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <input type="checkbox"/> A little | |

4. Which duties, would you say, agriculture has to fulfil in society? (multiple answers possible)

- | | |
|--|--|
| <input type="checkbox"/> Safeguard food security | <input type="checkbox"/> Generate economical growth |
| <input type="checkbox"/> Produce cheap food | <input type="checkbox"/> Secure a beautiful, diverse countryside |
| <input type="checkbox"/> Protect the environment | <input type="checkbox"/> Counteract global warming |
| <input type="checkbox"/> Provide a safe income for the farmer's family | <input type="checkbox"/> Produce energy |
| <input type="checkbox"/> Produce surpluses for export markets | <input type="checkbox"/> Preserve traditions |
| <input type="checkbox"/> Else _____ | |

5. Is agriculture an important part of modern society?

- | | | |
|------------------------------|-----------------------------|---------------------------------------|
| <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> I don't know |
|------------------------------|-----------------------------|---------------------------------------|

6. Do you think, today's agriculture in Turkey has any problems?

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> Yes, major problems | <input type="checkbox"/> No problems |
| <input type="checkbox"/> Yes, minor problems | |

7. If yes, which? _____

8. Is the Turkish government doing enough for farmers?

- Yes No I don't know

9. Would you pay more for your food, if ...

... it was for the benefit of small farmers?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
... it helped to preserve the environment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
... it helped to preserve the current rural countryside?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
... it benefited your health?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

10. Would the accession of Turkey into the EU change agriculture in Turkey?

- Yes No I don't know

11. Do you think agriculture in the EU is more environmentally friendly than in Turkey?

- More environmentally friendly Equally Less environmentally friendly

In case you feel unable not to answer one or more of the following questions connected to organic farming, feel free to leave those questions out.

12. Have you ever purchased organic food?

- Yes No

13. Would you want to buy more of your food from organic origin?

- Yes No

- Yes, if _____

14. Do you know a place where you can buy organic products?

- Yes No

15. When a product carries the organic certificate, do you have trust that there is for sure only organic food in it?

- Evet Hayır

16. Do you think organic farmers provide important benefits to society and the environment?

- Yes No I don't know

17. Should the government try to convince more farmers in Turkey to convert to organic farming?

Yes No I don't know

18. Can you imagine one or more reasons why farmers in Turkey hesitate or do not want to become organic producers?

Yes _____
 No, they should become organic farmers

To be able to categorize and generalize this questionnaire, I would ask you to provide some further information concerning your person.

Sex male female

Age: _____

Occupation(s): _____

Average monthly income: _____

Education: _____

Marital status Single divorced/widowed
 married/cohabiting

How many persons live in your household? _____

How many children live in your household?

Age 0-2 ... _____

Age 3-6 ... _____

Age 7-11 ... _____

Age 12-17 .. _____

Appendix 3: Online-survey (online between 2009-03-23 – 2009-04-20)

QUESTIONNAIRE – Stakeholder Opinion

This questionnaire is intended to verify some of the findings I believe I have reached during the numerous interviews with you, the stakeholders of the organic sector in Turkey. I am trying not to suggest anything in my research that doesn't reflect the opinion of those that are the source of my inquiry. Therefore it is of major importance to me that you take a few minutes and help me to be sure I understand and interpret your opinion correctly. In the following I will try to find patterns in how various stakeholders have answered to this questionnaire and compare it with my own findings, to then answer the question "Why not more Turkish farmers convert to organic farming, and what could be done to improve the organic farmer's situation".

I thank you very much for your help, and promise to send a copy of the finished Master-thesis, due sometime in summer 2009.

How well do the activities in the table below work in the Turkish organic sector?

	Well	Somewhat	Not at all
Coordinated, strategic development guided by the Ministry of Agriculture and Rural Affairs (MARA)			
Implementation of the Food and Farming Action Plan			
Creation of coherent, complementary and consistent policy measures to support OA and connect it to rural development			
Preparation of a clear and accessible Turkish National Organic Standard			
Acceptance of Turkey to the EU's 3 rd Country Status			
Creation of a stakeholder network			
Equivalent standards and laws for all control and certification bodies operating in Turkey			
Extension and advisory support from MARA Provincial Office Organic Units			
Establishment of an effective and efficient database system and data collection			
Implementation of pilot- and model-projects			

Please rank the following problems in Turkish organic farming according to their importance!

(1 = most important; 5 = least important; no answer = no problem at all)

The sector is organized in a top-down approach, and there is an almost complete absence of a functioning grass-root movement			
Many promising initiatives and projects are started to help organic farming, but are then not supported to guarantee their long-term survival and success			
At the moment there is no real leader (person, institution) to guide the organic sector in Turkey			
Actors in the organic sector in Turkey do not trust each other sufficiently			
Cooperation and coordination among actors in the organic sector is weak			

Please allocate the attribute ‘*weak*’ or ‘*strong*’ to the following stakeholder-groups (indicating their dominance in the Turkish organic sector)!

	Weak	Strong
Farmers		
NGOs/Civil Society		
Ministry of Agriculture and Rural Affairs (MARA)		
Alternative Agricultural Production Techniques Dept. at MARA		
Foreign companies in organic farming in Turkey		
Turkish companies in organic farming		
Turkish municipalities		
EU-institutions		
Consulting companies in organic agriculture		
Certification companies		
Consumers		
Universities		

Do you agree or disagree to the following statements?

	Agree	Disagree
The Turkish government has more important issues to deal with than organic farming and therefore cannot devote the necessary attention to the development of organic farming in Turkey.		
The current laws concerning organic farming in Turkey are hindering organic farming’s development.		
Incentives for cooperation among actors in the organic sector are not big enough.		
The public institutions are not used to cooperating with the private sector or civil society.		
The Turkish mentality is not cooperation-friendly.		

Because farmers are too unorganized they profit least from organic farming.

Turkey is at risk to be outcompeted by other countries.

The EU is a good source of financing, knowledge and cooperation for the organic sector in Turkey

Turkish organic farmers are poorly represented in the organic sector.

Farmers are taking high risks when converting to organic farming.

Farmers are facing high entry barriers to organic farming.

Organic farmers in Turkey are not committed to organic farming, but only in for the money.

Farmers are difficult to educate.

Too little research is done on organic farming in Turkey.

The market is more important for organic farmers' future than governmental subsidies.

In 2006/07 a EU-financed project, conducted by MARA resulted in a number of conclusions and recommendations for the development of organic farming in Turkey. Do you agree or disagree that these findings and conclusions are applied and show satisfactorily effects.

Which stakeholders do Turkish organic farmers trust the most? (multiple answers allowed)

NGOs (Buğday, ETO, Örgüder, etc.)

Ministry of Agriculture and Rural Affairs

Alternative Agricultural Production Techniques Dept

Foreign companies in organic agriculture

Turkish companies in organic agriculture

Turkish municipalities

EU-institutions

Consulting companies in organic agriculture

Certification companies

Consumers

Universities

In order to improve the organic sector's situation, which area of concern is in most need of improvement?

(1 = most important; 5 = least important)

Domestic market

Organisational structure

Cooperation/Coordination among stakeholders

Farmers' education/extension services

Legislative/Laws concerning organic agriculture

Do you agree or disagree to the following statements?

Agree Disagree

The Turkish government should officially declare support and guarantee the long-term potential for organic agriculture in Turkey

Farmers need an institution they trust and can always refer to if they feel they need advice.

The Turkish law on organic agriculture is not suitable for farmers' organization.

The government has to link rural development to organic agriculture.

Various public and private institutions should act as "market makers" to improve the possibilities for individual farmers to sell their products.

The conversion period needs special attention from MARA's side.

Today, organic agriculture in Turkey is not sufficiently institutionalized.

Findings from studies and existing knowledge about the organic sector in Turkey are not implemented efficiently enough.

Today, the Turkish domestic market for organic products is not understood well enough, and more work has to be done regarding target-groups, motives behind organic consumption, etc.

The EU should become a more active role in the Turkish organic sector as financier, advisor and cooperation partner.

Do you believe the following idea is practicable?

Under the assumption that yields in organic farming can remain on the same level as in conventional farming, if you apply modern techniques, farmers should be advised to convert to organic farming even without a market. The conversion would be economically profitable, because input costs in organic farming are comparably smaller and if yields do not decline, the farmer can save money by applying organic methods. The precondition is that the individual farmer is trained well enough and gets enough advice, so that he actually manages to keep yields on the same level as in conventional farming. This means they have to be taken care of very well by a public or private institution. Once the domestic market for organic products is big enough, these already experienced farmers could get an organic certificate and quickly succeed as certified organic farmers.

<input type="checkbox"/>	Idea is practicable	<input type="checkbox"/>	Idea is not practicable
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If you have any further comments in respect to this questionnaire, please do not hesitate to tell:

Appendix 4: Contact-list stakeholders (names in brackets indicate that no personal meeting has taken place)

Farmers

Muzaffer Kul	village project
Tekelioglu	village project
a farmer	Ege Univ.'s research partner
Yeniköy	village project
Gökkaya	village project
a vendor	% 100 Eko Pazarı Cankaya, Ankara
Mehmet Özmen	Terme Organik Findik Tarım

Academia

Prof. Uygun Aksoy	Ege University, Izmir
Prof. Yüksel Tüzel	Ege University, Izmir
Emre Bilen (PhD)	Ege University, Izmir
Prof. Ahmet Altındisli	Ege University, Izmir
Prof. Kürsat Demiryürek	19 Mayıs University, Samsun
Prof. Fatih Seyis	19 Mayıs University, Samsun
Prof. Ali Kemal Ayan	19 Mayıs University, Samsun
Dr. John Ryan	ICARDA/CGIAR
Prof. Takanori Nagano	Kobe University
(Prof. Gokmen Tayfur)	Institute of Technology, Izmir

Business

Özlem Demirci	Demak Trade
Chevrel Traher	Ömercan
Rauf Önal, Bülent Cinbasi, Cumhuriyet Harputlu	Mesurata Ltd.
Fatma Akalin	Isik Tarım
Bahadır Ünsal	Rapunzel
a vendor	Polen Tarım
Zafer Göynügür	IMO
Gürsel Tonbul, Hamit Cam, Tarik Bakmaz	Degirmen
Emel Öztürk	EcoCert
Atila Ertem	Rapunzel
(Tolga Illeez)	former IMO
(Hakan Barcin)	Zeytinhome
(Huseyin Dogan)	Gençler Dried Fruit Packaging Co.
(Hasan Feyzullah)	HM Organic

Government/administration

Müfit Engiz	MARA
Göksel Gecgel, Ahmet Atayol	DSI
Ece Karaman	AEA
Ekin Taskin	AEA
Azmi Akbaytürk, Murat Altun & OA-team	Izmir Municipality
Nimet Sanda	Tarım İş Müdürlüğü

International Institutions

Ulrike Hauer	EC
Nermin Kahraman	EC

Ralph Gifford
Yasemin Erkut

USDA
USDA

Civil Society

Victor Ananias, Sebnem Eras
Batur Sehirlioglu
Beti Minkin
Hilary Welch
Damien Dessane
Güven Eken
(Christopher Stolpes)
(Özge Balkiz)
(Ismail Ugural)

Buğday
Buğday
YerGorAnadolu
Doga Koruma Uzmani

Doga Dernegi
EcoS Consultancy Ltd
Doga Dernegi
Journalist