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CAP Strategic Plans and protein crops

A focus on strategies developed by Member States and support provided

The goal of this factsheet is to provide an overview of the CAP Strategic Plans (CSPs) in relation to the strategies and support provided by the Member States to protein crops. Those crops include a wide diversity of species ranging from soya bean, grain legumes/pulses (such as peas, lentils, and



beans as well as peanuts) to fodder legumes (such as alfalfa and clover) grown in pure or in mixture with grasses in temporary grasslands. Leguminous crops are important for EU agriculture since, as nitrogen-fixing crops, they can provide broad climate and environmental benefits in arable cropping systems, and as protein crops, they contribute to reduce EU's deficit in plant proteins. The different terms – protein crops, leguminous crops and nitrogen-fixing crops – are overlapping and used differently in relation to the CSPs interventions and objectives.

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I. The CAP strategic plan regulatory framework

Fact #1.1: Leguminous crops have a specific status under the CAP strategic plan Regulation

In the Strategic Plan Regulation, the different terms of leguminous/protein/nitrogen-fixing crops are used but only GAECs and CIS present specific regulatory conditions associated to those crops.

CSP <u>CAP Strategic Plans</u>
SPR <u>Strategic Plan Regulation</u>

MS Member State

GAEC Good Agricultural and Environmental Conditions

CIS <u>Coupled Income Support</u>

ES <u>Eco-Schemes</u>

AECC Agri-Environment and Climate Commitments

SI Sectoral Intervention

Figure 1: Glossary - Main acronyms used in the factsheet in relation to the Common Agricultural Policy (CAP) and links to further explanations on those terms and interventions

Source: DG AGRI

The environmental assets of leguminous crops are partly recognised through GAECs' exemptions. The GAECs include exemptions for areas with "leguminous crops" and, initially, "nitrogen fixing crops".

GAEC 7 provides an exemption to crop rotation requirement when more than 75% of arable land is used to produce grasses or other herbaceous forage, is land lying fallow, or is used for the cultivation of leguminous crops, or subject to a combination of those. GAEC 8 related to the minimum share of arable land devoted to non-productive areas and/or features has been modified in 2024 and do not include conditions related to leguminous crops / nitrogen fixing crops anymore.

In annex I of the SPR, the short description of the result indicator R.19 "improving and protecting soils" related to the SO5, presents "crop rotation included with leguminous crops" as an example of commitment beneficial for soil management to improve soil quality and biota.

Fact #1.2: Coupled Income Support allows an additional financial allocation for the protein crops

Recital (67) of the SPR presents the regulatory framework related to protein crops and coupled income support. Those crops benefit from an exemption to demonstrate the difficulties of the sector, as it is considered horizontally justified at EU level (art. 32.2 of SPR). Article 96.3 of SPR provides the possibility to increase up to 2% the 13% maximum financial allocation of direct payments for CIS to support protein crops.

Fact #1.3: Income support to sectors in difficulty and/or emerging sectors

The support to protein crops is often embedded in a **broader need related to income support for sectors in difficulty** (IE, HU, EE, SI, CZ), **non-competitive sectors** (FR) or **emerging/innovative sectors** (BE.Wa, FR, LT). Following the narrative of the SPR, increasing the domestic supply of protein feed materials for livestock sectors remains the main goal.

If the economic assets of legumes, both, as break crop and as crops reducing the needs/costs related to fertilisers are sometimes mentioned; regarding the economic difficulties, the section on the overview of interventions for protein crops of several CSP mentions the following key issues of protein crops in the cropping systems:

- lower economic performance in EU crop rotations than for main cereals (BE-Wa, CZ, IT, PL, ...), but also rapeseed (LT);
- low competitiveness vis-à-vis other protein sources (CZ) and strong international competition (ES, IT, PL, ...);
- more risks in terms of yields (BE-Wa, FI, HR, IT, LU, PL) and broader volatility of prices and income (EE, IT, PL, SK).

Another approach relates to the **economics of the livestock farms** in order to:

- reduce the livestock farms production costs and dependence on variable feed prices (BG, LT, SI, ...) and
- increase the resilience of livestock farming systems through improved protein autonomy (FR, LU).

Few Member States extend the economic difficulties of the protein crops' sectors to a broader value chain approach ranging from:

- the lack of research and innovation notably in the plant breeding sector (FR, IT, LU) but also related to the lower availability of, and/or knowledge on, protein crop management practices (PL, SI);
- the need to structure the sectors (FR, IT, LV) and
- the requirements of investments in the agro-industry and agro-equipment (FR, IT, RO, SI), including related to the small farm structures issue (RO, SI).

In most cases, the economic difficulties and drivers of the low competitiveness of protein crops are not further detailed, which may be due to the Regulation's general recognition of the difficulty of the sector and the exemption from the requirement to demonstrate the difficulties of the sector (art. 32.2 of SPR).

Fact #1.4: "Protein crops" are defined widely in the CIS

The SPR article 33 (c) defines "protein crops, including legumes and mixtures of legumes and grasses provided that legumes remain predominant in the mixture". This extension of the CIS to mixtures of legumes and grassland compared to previous CAP framework opens new possibilities to the Member States notably in terms of support to the grazing livestock farming systems.

II. Member States' strategies regarding leguminous crops

Fact #II.1: Most Member States define their needs and design their protein crop strategy on, both, the economic challenges and the environmental benefits.

In most of the Member State's CSPs, the protein/leguminous crops' challenges are embedded in broader economic and/or environmental needs. Only a few Member States have identified a dedicated need on the protein crops, protein sources or protein transition. IE's need (Obj1.N3) to "support protein crops to encourage an increase in the domestic production" is related to economic specific objectives (SO1). BE-FI's need (NO7) to "reduce dependence on external protein sources" and DE's need (I.6) "expanding sustainable cultivation of protein crops" are more defined on environmental specific objectives (SO4 and SO5). The NL's need (N.28) goes to a broader societal context (SO9) with "more sustainably produced food including protein transition".

Out of the 28 CSPs, 22 present a partially developed overview of their protein-crop-related contexts and interventions in the section of their CSP on the overview of interventions for protein crops. Most Member States justify their interventions related to protein/leguminous crops on, both, the economic challenges and the environmental benefits. Some Member States present a stronger economic focus (PL, RO, SI, HU, ...). A few Member States (DE, AT, DK, BE-Fl) justified their interventions from a pure environmental angle. Additionally, more societal concerns are presented.

Only some Member States provide concrete context indicators related to protein/leguminous crops such as: national areas and trends, levels of production and share of legumes in agricultural land. Few Member States provide some info regarding plant protein production and needs with indicative deficits related to their livestock's feed sector. Only FR sets an ambitious target to increase legumes' area (double by 2030 the area of 2020) and share of the agricultural area (8%).

Fact #II.2: Recognised contribution of the protein crops to the environmental sustainability of the crop rotations and the livestock farming systems

Several Member States draw their protein/leguminous crops strategy within the broader environmental sustainability of the agricultural sectors. This approach is, in most CSPs, combined with the previous economic concerns.

The needs identified related to protein/leguminous crops encompass improving the European cropping systems through the diversification of crop rotations (DE) and enhancing the resilience of the agri-food sector (IE, FR). The cultivation of legumes is meant to reduce the negative impact of specialised and simplified cropping systems on soils, water and climate (HR) as well as biodiversity (BE-Wa).

Reducing the EU dependence on external protein sources and their related environmental impacts is another approach, mentioning deforestation (BE-Fl) and transport footprint (BE-Wa, ES).

The reduction of greenhouse gases (GHG) emissions, notably nitrous oxide (N2O) from organic and synthetic fertilisers (RO, BE-Wa) as well as carbon sequestration (RO) are the main aims at crop rotation level (BE-Fl, FR) but also to redefine climate friendly livestock production systems (AT, BE-Wa, FR). Environmentally, protein/leguminous crops are mainly identified in the section of the CSPs on the overview of interventions for protein crops as:

- Nitrogen-fixing crops that require less GHG intensive inputs linked to reduced nitrogen fertilisation (BE-Fl, BE-Wa, BG, CZ, DE, FR, HR, IE, IT, LT, PL, RO, SI);
- Melliferous crops for pollinators (BE-Wa, IT, LT, SI) as well as through the food they provide to small mammals and birds (DE) in favour of biodiversity in general (FR);
- Crops improving soil structure (FR, LT, SI) including the reduction of soil erosion (CZ) and soil improvement through humus (DE, PL, RO);
- Break crops, diversification crops reducing pesticides notably herbicides uses at crop rotation level (CZ, DE, ES, FR, IE, LT, RO, SI).

In addition to their contribution to reduce nitrogen fertilisers uses and related climate change mitigation aspects, some Member States link the support to protein/leguminous crops to the preservation of water bodies, by reducing nutrient leaching, as well as biodiversity. IE links the support to protein/leguminous crops to the reduction in the use of chemical N-fertilisers, plant protection products and nutrient losses. Only FR and LT provide concrete targets/indicators regarding nitrogen savings and reduction of GHG emissions. FR estimates that: "doubling leguminous areas by 2030 will lead to a nitrogen saving of almost 150 000 tonnes per year, or a reduction in mineral nitrogen consumption by 7%." LT mentions that "it has been scientifically proven that the inclusion of protein crops in the crop rotation system at least once every four years has a significant impact on the reduction of CO2 equivalent emissions and ozone formation (10-15%)".

The **importance of leguminous crops for organic production** is highlighted by several Member States (CZ, DE, EE, EL, ES, IT, LV, PT, SI).

Some Member States have identified plant proteins and the transition to plant proteins as a mean of improving the image of agriculture, in line with social/consumer expectations (BE-Fl), and by raising awareness and encourage consumption of healthy diets (RO, SK). Additionally, to the economic and environmental concerns, they justify their protein/leguminous crops intervention through broader societal concerns such as the imports of GMOs (IT, PL), quality products and schemes (IT, LT, LV, PL, PT, SI, BE-Fl, HR), imports' impact on deforestation (BE-Fl, FR), increase of plant proteins in human consumption (BE-Wa, ES, FR, IT, PL, SI, ...). Additionally, the section of the CSPs providing an overview of interventions related to protein crop9 mentions the cultivation/preservation of local plant varieties that are important for cultural heritage and genetic varieties (EE, EL, ES, PT).

III. The coupled income support interventions

Fact #III.1: 31 CIS interventions in 20 CSPs: CIS is the main tool targeting protein crops

Coupled Income Support is one of the main interventions used by Member States to support protein/leguminous crops. Implemented in 20 CSPs (BE-Wa, BG, CZ, EE, EL, ES, FI, FR, HR, HU, IE, IT, LT, LU, LV, PL, PT, RO, SK, SL), 31 interventions are targeting or including those crops. Generally, Member States plan from 1 to 4 different CIS interventions on protein crops depending on the sectors targeted (see maps). Only 8 CSPs do not implement CIS for these sectors (BE-Fl, DK, DE, AT, SE, CY, MT, NL). Most of those Member States limit their CIS to ruminant livestock sectors or do not implement CIS (NL).

Fact #III.2: A high diversity of leguminous crops is supported through CIS

As shown by the maps below, the support to protein/leguminous crops through CIS, can be clustered in 4 main sub-sectors.

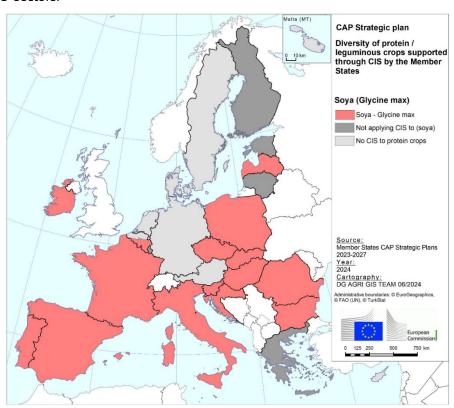


Figure 2: MAP Soya bean support through the CAP SPs Source: DG AGRI

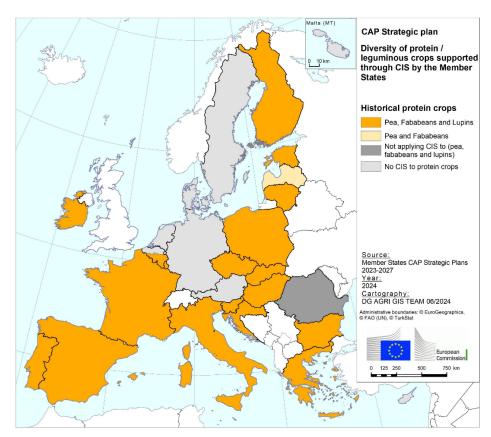


Figure 3: MAP Peas, Fava beans and Lupins support through the CAP SPs Source: DG AGRI

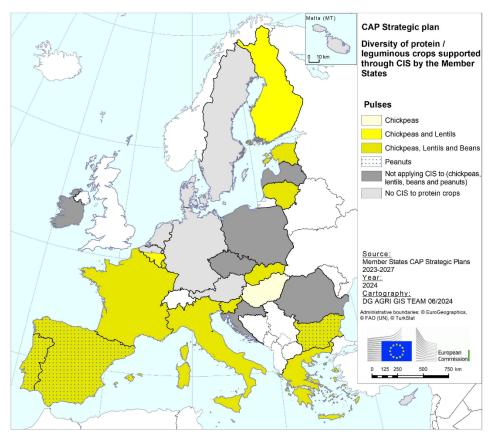


Figure 4: MAP Pulses — Lentils, Chickpeas, Beans and Peanuts support through the CAP SPs Source: DG AGRI

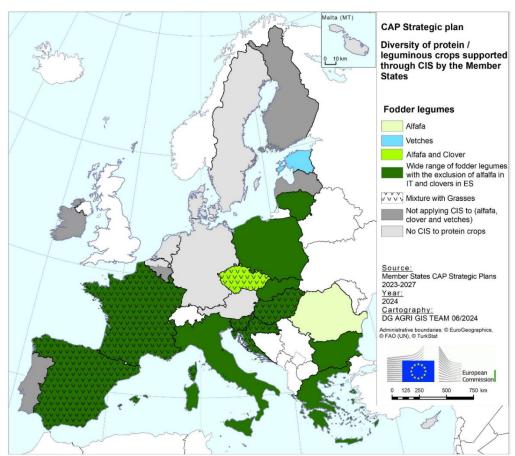


Figure 5: MAP Fodder legumes – Alfalfa, Clover, Vetches, Grass support through the CAP SPs Source: DG AGRI

All Member States supporting protein crops through CIS, except RO, are supporting **the historical CAP protein crops: field peas, broad/faba beans and lupins** (19 CSPs/20). Two CSPs (IE, LV) even limit their CIS to those historical protein crops and soya.

Most Member States supporting protein crops through CIS are supporting **soya beans** (15 CSPs/20). Two Member States – IT and RO – have a dedicated intervention on soya beans; both Member States are already two major EU soya producers with respectively 30 and 15% of EU soya area in average over 2020/23. The 5 Member States (LU, FI, EE, EL, LT) which did not include soya have a limited potential of soya production due to their climate.

Out of the 20 Member States supporting protein crops through CIS, 14 extend the support to **other pulses with a higher focus on human food such as chickpeas, lentils, common beans but also peanuts**. Only two Member States (EL, ES) propose dedicated sub-interventions with higher unit amounts for production targeting the food markets. Chickpeas are supported through CIS in 14 CSPs/20; lentils in 13 CSPs/20; common beans in only 11 CSPs/20. Other species of legumes such as Vicia ssp., Vigna ssp., etc are mentioned to a lower extent in CSPs. CIS support to peanuts is available in BG and PT with ES additionally (3 CSPs/20).

The fodder/forage legumes grown in pure or in mixture with grasses mostly for ruminants are included in the protein crops. It concerns also the industrial dehydrated fodder legumes sectors notably alfalfa. Alfalfa/Lucerne is the main fodder legume covered by CIS with 13

CSPs/20, followed closely by clovers and vetches. Other fodder legumes are included in CIS with a partially detailed list of species. FR, ES, HU, BG, PL provide notably an open list including Onobrychis, Lathyrus, Lotus, Melilotus, and Ornithopus species. Few Member States (FR, HU, PL, ES, EL) have a differentiated unit amount between grain legume and fodder legumes.

Less than half of the Member States supporting protein crops through CIS (8 CSPs out of 20), used the new possibility to support mixtures of legumes and grasses offered by the SPR which would focus on the grazing livestock. More Member States (12 CSPs out of 20) included the possibility to support mixtures with other crops such as cereals.

Plant breeding and supporting the legumes' seeds sector is not part of the Member States needs assessments. Still, in relation to the competitiveness gap of protein crops compared to other crops, the lack of Research & Innovation in plant breeding is mentioned in the section on the overview of interventions for protein crops of several CSPs and in some justifications of the CIS interventions. 8 Member States specifically mention the support to **legumes certified seed production** with 4 having a dedicated intervention or sub-intervention. Those supports can cover both grain and fodder legumes (ES, FR, EL, PT) or target the grass and fodder crops (LU, HR, LV, RO).

Fact #III.3: An increased financial allocation for 2023/27 through coupled support on protein crops

Compared to the previous CAP period, where voluntary coupled support (VCS) to protein crops was implemented in 17 Member States, 3 additional CSPs have included CIS to protein crops: BE-Wa, PT and EE. SI and SK confirmed their support which was only implemented a couple of years in the previous period.

The financial allocation to protein crops through coupled support has increased by +26% from EUR 475 million planned yearly in average for the VCS period 2015/2022 to close to EUR 600 million planned, in average, per year for CIS on protein crops over 2023/27. The increase is even higher, +34%, when comparing the planned CIS to the paid VCS on the period 2015/21 with EUR 447 million. Paid VCS has been in average about 94% of the planned VCS financial allocations.

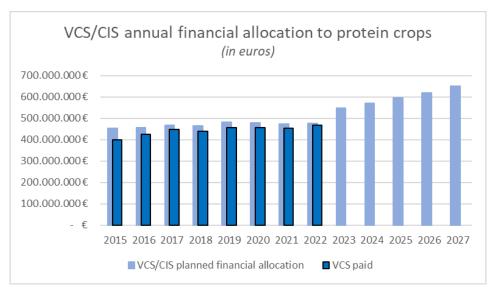


Figure 6: EU VCS and CIS support to protein crops Source: DG AGRI

Fact #III.4: An increased planned supported area of protein crops for 2023/27

The planned supported area of protein crops is close to 50% higher than the planned VCS area but this increase goes down to 31% when comparing the CIS planned area to the effectively paid VCS average area and even to 23% when comparing to 2022, the last year of VCS implementation. Effectively paid areas on VCS to protein crops increased over the period 2015-2022 and they are often higher than the planned areas.

Compared to the effectively paid VCS area in 2022, only 5 Member States plan an important increase of the protein crops supported area: LU, IE, FR, IT and ES with, respectively, +90%, +54%, +54%, +34% and +31%. LT, HR, CZ plan a more moderate increase between +26/15%. Most Member States have planned to keep stable, over the period, the areas of protein crops supported through CIS. Only four Member States, FR, IE, SI, BE-Wa and BG at a lower level (+3%), plan a progressive increase of the supported areas over the 5-years period 2023/27. BE-Wa plans to more than triple its areas and the financial allocation simultaneously from 4 to 13.5 thousand hectares between 2023 and 2027. FR plans to increase its supported area from 1.25 million ha in 2023 to 1.9 in 2027 (+52%) with a parallel increase of the financial allocation about +65%. IE and SI plan respectively an increase of +67% and +32% of the supported areas but with a constant annual financial allocation over the 5-years period (reduction of the unit amount over the period).

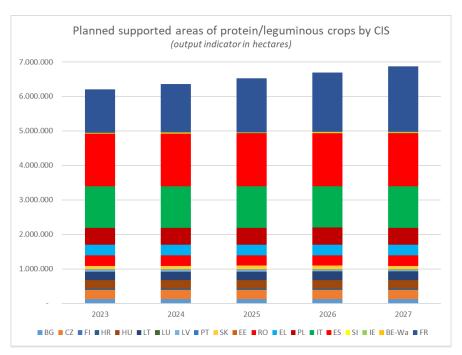


Figure 7: Expected protein crops supported area through CIS per MS Source: DG AGRI

Fact #III.5: High variation and attractiveness of the unit amounts

The EU average CIS unit amount to protein crops is about 91 EUR/ha. It remains close to the average paid amount under VCS support (90 EUR/ha) but decreases compared to the planned VCS support of 109 EUR/ha. This average unit amount hides a wide diversity of levels of support between Member States and protein crops' sub-sectors, which reflects the fact that the Member States have different support strategies (of which CIS is only one element) and targets in response to different needs. The lowest levels of support are about 40-55 EUR/ha. By contrast, the highest levels of support ranging from 200 till even more than 300 EUR/ha are provided in 3 Member States planning an important increase of the supported area over the 5-years period 2023/27: IE, BE-Wa and SI with respective increases of their expected supported areas of respectively +67%, +333% and +32%.

Within the Member States, the level of support can vary between protein crops' sub-sectors. If most Member States do not adapt the level of support to the different value chains, some present a high level of differentiation of the unit amounts. The highest level of support goes, often, to the legumes seeds' sector, then for the grain legumes/pulses for human consumption quality, followed by the grain legumes for feed and lowest level unit amounts to the fodder legumes. Regarding the Member States differentiating the level of support between grain and fodder legumes, except for FR, the Member States provide generally a higher level of support to grain legumes compared to fodder legumes. For FR, this higher support to fodder legumes can be explained by a farm level approach with notably a decrease in CIS to ruminants and a shift for the grazing livestock sector to CIS on fodder legumes including mixture with grasses.

IV. Eco-schemes andAgri-Environment andClimateCommitmentsinterventions

Fact #IV.1: Almost allMember States have planned at least one ecoscheme and/or Agri-Environment and Climate Commitment involving leguminous crops

Almost all MS, except 2, have planned at least one eco-scheme and/or Agri-Environment and Climate Commitment (AECC) supporting the inclusion of leguminous/nitrogen-fixing crops in arable cropping systems because of the broad climate and environmental benefits provided.

Inclusion in crop rotation/diversification of nitrogen fixing crops / leguminous crops is one of the most common agricultural practices supported by eco-schemes. The main environmental benefit is that the cultivation of protein/leguminous crops is, normally, done without nitrogen-based fertilisers and allows reducing the nitrogen applied to the subsequent crop because of their natural capacity to fix Nitrogen from the atmosphere, therefore leading to benefits for water quality, biodiversity and reduction of N2O greenhouse gas emissions. Nitrogen-fixing crops have been identified as one of the major practices for soil conservation. 20 CSPs have planned eco-schemes (or sub-schemes) targeted or including support for those crops, some setting a minimum share of area over the total arable land.

Only 8 CSPs do not include nitrogen fixing crops practices in their eco-schemes (AT, CY, MT, CZ, LU, PT, SI, SK). However, of these 8 CSP, 4 (AT, MT, PT and SI - together with BE-F, DE, ES, FR, IT) have at least specific Rural Development (RD)/AECC interventions on the "cultivation of nitrogen fixing and/or protein crops". The other 4 (CY, CZ, LU, SK) have "crop rotation and diversification" in RD/AECC interventions without a specific focus on leguminous/ nitrogen fixing crops. Therefore, nearly all Member States have planned interventions supporting the environmental and climate services delivered by leguminous crops in their CSP.

The eco-schemes supporting nitrogen fixing crops often include other farming practices (e.g., no use of fertilisers and/or plant protection products) and contribute to a wide range of result indicators (R.4, R.6, R.7, R.12, R.19, R.20, R.21, R.22, R.24, R.31, R.33, R.34, R.44¹). 9 CSPs (DK, EE, EL, HR, LT, LV, PL, RO and SE) support both catch crops and leguminous.

Under rural development, 17 CSPs have included 43 "crop rotation and diversification" interventions. These CSPs are AT, BE-Fl, CY, CZ, DE, EE, EL, ES, Fl, FR, IT, MT, PL, PT, RO, SI and SK. Under "crop rotation and diversification" interventions, farming practices such as crop rotation, crop diversification, mixed cropping, cultivation of intermediate/catch crops etc. are met. Among these interventions, 20 focus more specifically on the "cultivation of nitrogen fixing and/or protein crops" and have been designed in 9 CSPs. These CSPs are AT, BE-F, DE, ES, FR, IT, MT, PT and SI. As in the eco-schemes, the AECC interventions with nitrogen fixing/protein crops could be either sole or combined interventions and the objectives and types of commitments are somewhat similar to the eco-shemes. It can be safely said that this support has risen compared to previous programming period.

¹ A dashboard of result indicators can be found here: <u>Result Indicators dashboard (europa.eu)</u>

The combined ones often include other practices and contribute to a wide range of result indicators, namely R.12, R.14, R.19, R.20, R.21, R.22, R.24, R.31, R.33. Most of these interventions contribute to all the three environment and climate related specific objectives (SO4, SO5, SO6). In regionalised Member States (ES, FR, IT, DE and FI) not all interventions are programmed at national level and might be available only in some of the regions. In most cases, the leguminous/nitrogen fixing crops' species allowed for the compliance with a minimum share of those crops in the crop rotation, are not specified in the CSP but in the national implementing documents.

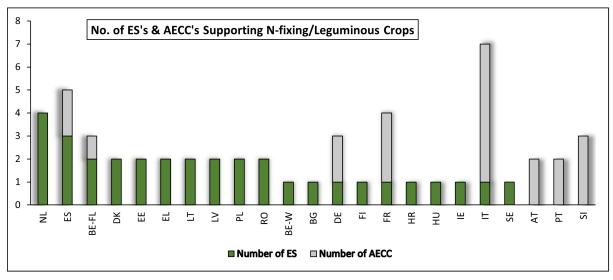


Figure 8: Number of eco-schemes and/or AECC supporting nitrogen fixing / leguminous crops

Source: DG AGRI

V. Other capinterventions onleguminous crops

Except for two Sectoral Intervention (SI) planned on protein/leguminous crops in Latvia and France (2024), CSPs lack clear integrated strategies regarding the interrelation between different interventions and notably targeted implementation of accompanying interventions from the Rural Development on innovation, advisory, risk management, investments, etc.

Fact #V.1: Two Member States used the new possibility of the current CAP to implement sectorial interventions on protein crops

Regarding the new possibility of the current CAP to implement Sectorial Intervention (SI) in the "other sectors" including protein crops, LV has selected many types of interventions, France is more prudent and focus on the basic 'structural' types of interventions such as investments, advisory services and promotion. No risk prevention and crisis management types of interventions have been designed.

In Latvia, a SI is planned related to protein/leguminous crops with a small budget (EUR 128 000; EUR 32 000/year from 2025 to 2028). This SI is targeted to dried shelled leguminous crops, whether or not peeled or split (e.g. peas, chickpeas, beans, etc.). More oriented to the food market, LV's CSP opens the SI to the following actions:

- investment in tangible and intangible assets, research and experimental and innovative production methods and other activities;
- advisory services and technical assistance as well as training, including mentoring and exchange of best practices;
- organic or integrated production;
- sustainability and efficiency of transport and storage of products
- promotion, communication and marketing of sales, including actions and activities specifically aimed at raising consumer awareness of EU quality schemes and the importance of healthy diets, as well as diversification and consolidation of markets;
- implementation of Union and national quality schemes and of traceability and certification schemes, in particular monitoring the quality of products sold to final consumers.

France proposes to open in 2024 SIs on, both, dried fodder/dehydrated alfalfa and plant proteins (oilseeds, protein crops and pulses) with respectively a total financial allocation of EUR 22.1 million and EUR 51 million. The financial allocation is planned to increase from, respectively, EUR 3.9 million and 7.5 million in 2025 to EUR 6.5 million and 16.5 million in 2028. Additionally, to LV and FR, several Member States mentioned, in the section of the CSP on the overview of interventions for protein crops, the poor organisation of the sector (IT) and the possibility to better structure the sector through producer organisations (BG, EL, SI), which could be supported through the cooperation rural development intervention, but without specific requirement in the implementation of this intervention.

Fact #V.2: In the Rural Development, interventions on risk management, investments, cooperation and innovation are open to protein crops but without specific criteria compared to other sectors

In the section of the CSP on the overview of interventions for protein crops, Member States mention the possibility for the protein/leguminous crops' sectors to mobilise other interventions but without specific mention of protein crops in the design of those interventions and dedicated financial allocations to those crops:

- Risk management (BE-Wa, EE, HR, IT, LT, LU, PL, RO) and insurances (LT, PL);
- Investments (BG, CZ, EL, ES, FI, FR, IT, LT, LV, PL, PT, RO, SI, SK); SI lists among other potential investments "the purchase of agricultural machinery, for farming in mountain areas and for the harvesting of fodder from grassland, forage storage facilities, pasture land and access to public infrastructure";
- Innovation (EL, LV, SI, FI, FR, HR, IE, IT) with some Member States mentioning Operational Groups through the EIP-AGRI and farm advice (BE-FI, CZ, EL, FI, HR, IE, LT).