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Agricultural Knowledge and Innovation Systems (AKIS)

in Montenegro

National Report and Proposed Draft Action Plan

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Brief overview on Montenegrin agricultural sector

Agriculture is a sector that plays a multiple role in the development of society and economy of Montenegro. Its economic importance is reflected in high contribution to GDP creation - the share of agriculture, hunting and forestry in total Gross Value Added (GVA) is 7.6% (MONSTAT, 2020). The employment data of MONSTAT (less than 2% of the total) refer only to the business entities (enterprises, co-operatives, etc.), without employment on the family agricultural holdings. However, according to the Agricultural Census (2010), 47,870 annual working units (AWU) were engaged in agriculture on 48,870 agricultural holdings, what was almost one fourth of the total number of employed people in Montenegro. Agriculture plays other important roles as well: it constitutes the basis for the food value chain; contributes to the development of tourism; encourages the development of many other sectors (production of equipment, machinery and packaging material, transport and numerous services); it is crucial in the sustainable development and mitigation of the depopulation of rural areas; it is an important factor in preserving tradition and the overall cultural heritage of the Montenegrin villages.

Despite the small size of the country (13,812 km²), Montenegrin agriculture is very diversified, from citruses and olive growing in the coast, vineyards and vegetables in the central part to continental fruits, potato growing and extensive livestock rearing in the northern part. According to the MONSTAT data, the total used agricultural area (UAA) from 221,297.6 ha in 2010 was increased to 257,949.8 ha in 2020, or by 16.5% in the last ten years. The share of grasslands (natural meadows and pastures) in total used agricultural areas is extremely high (94.3%), what is a unique characteristic of Montenegrin agriculture, making it different significantly even from its neighbours (Figure 1). This structure of the used agricultural areas predominantly determines rearing of ruminants (cattle, sheep and goats) as the main branches of the livestock sector.

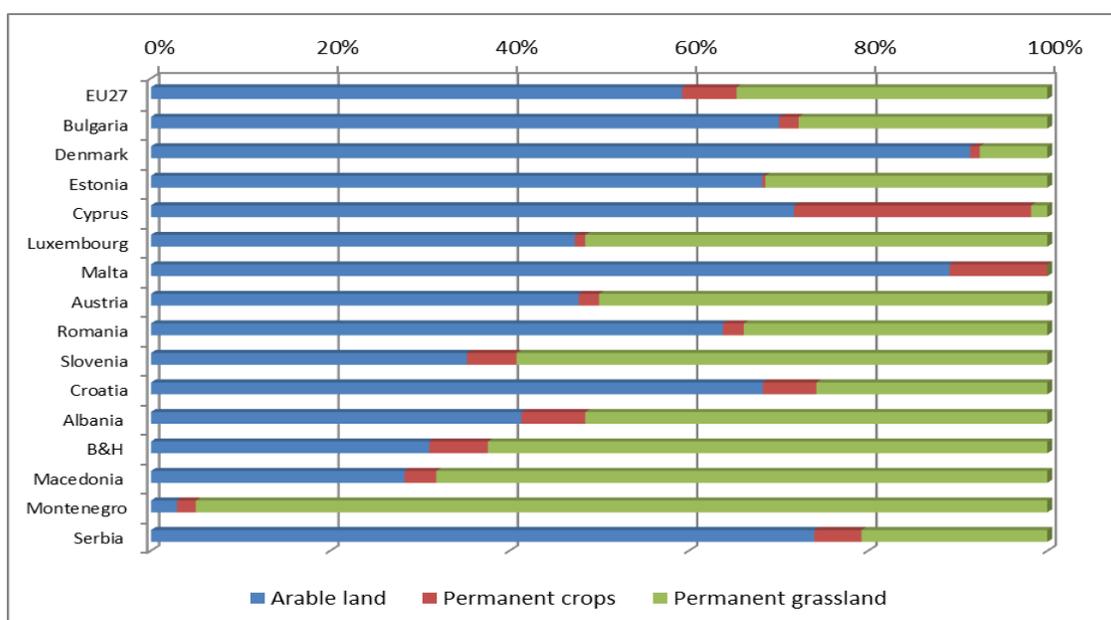


Figure 1: Utilized agricultural area: Montenegro vs WB and EU countries

Regarding trade of agro-food products, Montenegro is a net importer with very high dependency on food imports, the total export hardly covers 11% of the import, which is above 500 mil. Euros (MONSTAT, 2021). Montenegro has a negative trade balance with all WB countries, except Kosovo. A relatively small number of exported products reveals the main constraints in the agricultural sector where small scale of production and low competitiveness of domestic products are among the key ones.

The key above-mentioned characteristics of the Montenegrin agriculture, respecting very low population density (45 people per km² - one of the most sparsely populated countries in Europe), have to be taken as the starting points in designing of the agricultural policy. In addition to the commitment of Montenegro to become EU member, those sector characteristics have to be a base for development of the institutional frame for sustainable development of agriculture and linked food value chain/s. There is no doubt, **the AKIS has an essential role** in the institutional set-up in agriculture and food sector.

The AKIS Map in Montenegro

Regardless of the small size of the country and the key characteristics of agriculture, the AKIS system is very complex. There are many AKIS players of different capacities and weaker or relatively stronger links among them. The map of AKIS in Montenegro, with the key players and their links, is presented in the Figure 1.

The key actors in the AKIS

The institutional and administrative framework in Montenegrin agriculture and food sector comprises a number of key institutions, administrative bodies and other stakeholders.

Universities. As it was seen from the Map, there are two universities involved in AKIS – one state (University of Montenegro) and one private (University Donja Gorica). **Biotechnical Faculty, the unit of University of Montenegro**, is a leading higher education and scientific-research institution in the country. It covers the main fields of agricultural sciences, including veterinary medicine and forestry. The Biotechnical faculty (ex Biotechnical Institute) has continued its tradition in providing wide range of the professional and laboratory services (authorised phytosanitary lab, the national dairy lab and many others). By doing so the Faculty has multiple collaborations with many stakeholders shown on the map (the Ministries, the food companies, family farms and their associations, and the others). **Faculty of Food Technology, Food Safety and Ecology** is a unit of the recently formed private university Donja Gorica, Podgorica. As its name indicates, the Faculty is primarily dealing with higher education in the processing industry, including hotel-catering hygiene and sanitary conditions, as well as ecology.

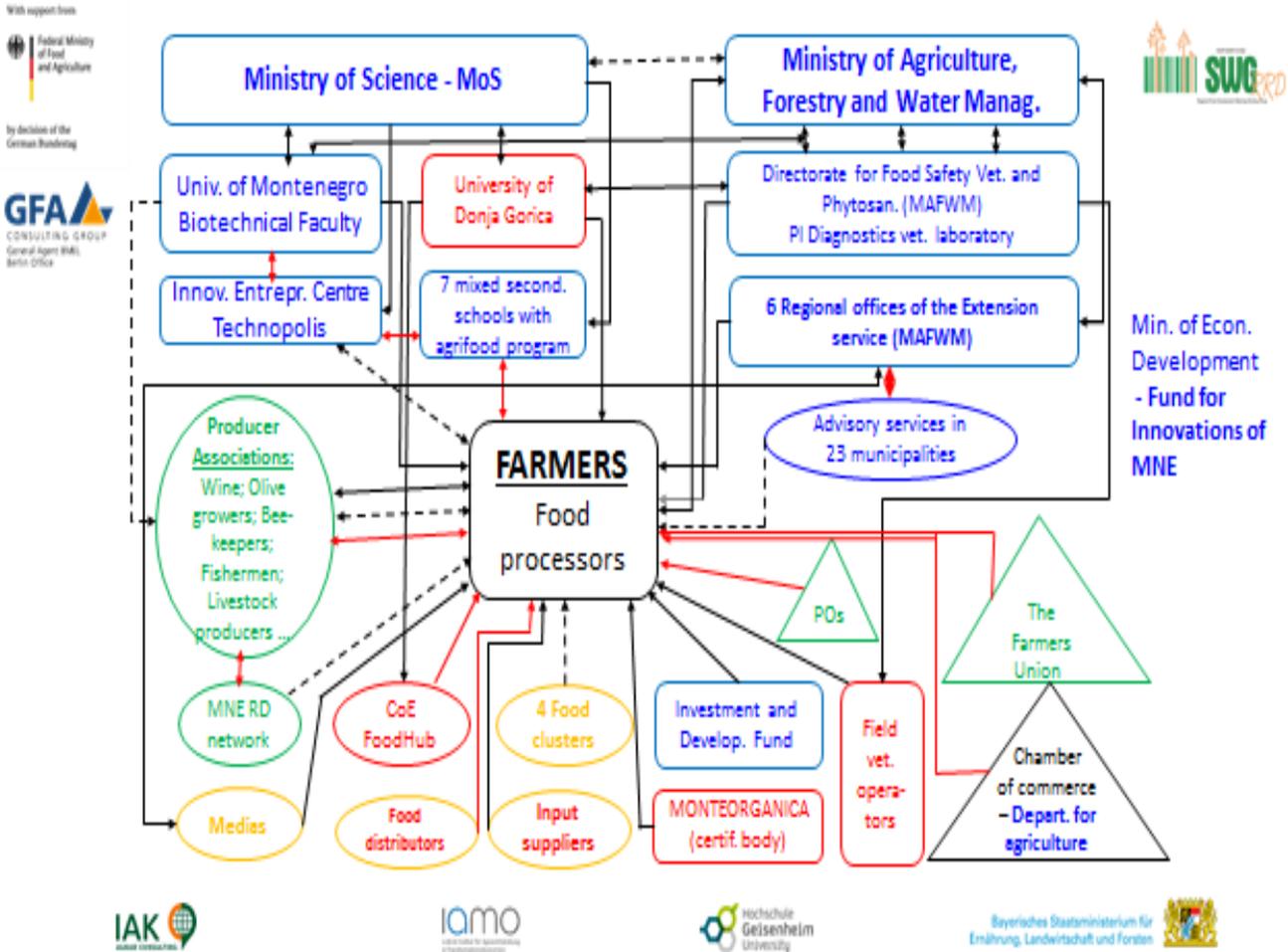


Figure 1: The AKIS Map in Montenegro

In the Figure 1 – the AKIS mapping, used symbols (the shapes, colours and line types) have the following meaning:

- The existent AKIS players that have sufficient capacity to function properly are presented by quadrangles;
- The existent AKIS players that do not have sufficient capacity to function properly are presented by circles;
- Non-existent AKIS players that are critical for the AKIS system to function properly are presented by triangles;
- Blue colour represents institutions from the public sector;
- Red colour represents organizations from the private sector;
- Green colour represents stakeholders from NGO sector;
- Yellow colour represents other organizations/stakeholders;
- Full black line represents a functional relationship between AKIS players;
- Dashed black line represents partially functional relationship between AKIS players;
- Full red line represents a non-existent, but necessary relationship between AKIS players.

Regarding the governmental bodies in the AKIS structure, two ministries are of the special importance: Ministry of Agriculture, Forestry and Water Management (MAFWM) and the Ministry of Science (MoS)¹. In the recent time the Ministry of Economic Development (MED) has important role, due to fact that it is responsible for Fund for innovations and implementation of the Smart Specialisation Strategy.

The Ministry of Agriculture, Forestry and Water Management (MAFWM) is the key institution in designing and implementation of the agricultural policy. After the political changes in August 2020, the Ministry was changed the name from Ministry of Agriculture and Rural Development into the existing one. During the second part of 2020 and in 2021, the Ministry changed the internal systematization of workplaces even twice. These formal changes slowed down the essential reforms in the sector including significant delay in preparation and adoption of the new strategy. The key units of the MAFWM are: Directorate for Rural Development; Directorate for Agriculture (since 2019 the Advisory/Extension service has been functioning in it) and Directorate for payments. These directorates are responsible for creating policies, drafting primary and secondary legislation proposals and overseeing the implementation of adopted the policies and laws. In addition to these directorates, the Administration for Food safety, Veterinary and Phytosanitary affairs is also functioning as a unit of the Ministry. It consists of the three sectors: *Food safety sector* - responsible for coordination and monitoring food safety policy; *Veterinary sector* - responsible for the animals health care, animal welfare and veterinary practices; and *Sector for Phytosanitary affairs* performs tasks pertaining to the laws in the field of plant health protection, seed and planting materials. There are two national laboratories (Specialist Veterinary Laboratory and National Reference Phytosanitary Laboratory as a unit of the Biotechnical Faculty), both supervised by the Administration. By doing so, the Administration closely collaborate with many stakeholders: the universities, private veterinary service, input suppliers etc.

Advisory service in Montenegrin agriculture is functioning on two levels: a) on the municipal - advisory service in each of the municipalities; and b) on the national level - the National Advisory service as a unit of MAFWM. The Advisory service on municipal level is very weak, without deep involvement in implementation of the agricultural policy. It rather serves for municipal administrative purposes. **The National Advisory Service** has clear structure and it is functioning in two divisions: Advisory service for plant production and Advisory service for animal production. Both operate through the regional centres (Bar, Podgorica, Nikšić, Berane, Bijelo Polje and Pljevlja). Until 2018, it had functioned within the Biotechnical Faculty. Since 2018, after formal change, the services have been functioning as departments of the Ministry of Agriculture and Rural Development. This change made weaker the relationship between advisors and faculty scientific staff. The Advisory services are specialized for performing advisory activities in agriculture and rural development. However, the employees of the Advisory service are more and more involved in the pure administrative tasks and duties related to the implementation of the direct payments and rural development support to the family farms. Hence, the original professional and advisory roles of both divisions of the National Advisory Service are diminishing by time.

¹ The Ministry of Science is again independent ministry, until recently it was a part of the Ministry of education, science, culture and sport

There is an independent body - **Monteorganica, doo**, an accredited certification body for control and certification in organic production.

As it was presented on the AKIS Map, there are seven secondary schools with agrifood programs: Nikšić, Berane, Bijelo Polje, Pljevlja, Mojkovac, Bar and Andrijevica. Majority of them have educational programs for agricultural and veterinary technicians.

Innovation-Entrepreneurship Centre Tehnopolis, as a business incubator in agriculture located in Nikšić, supports innovation processes for product, service and process improvements, laboratory services, consulting, standards and patent information, technology transfer, technology testing, database use, and joint participation in EU-funded projects. It should also contribute to S3 strategy implementation.

The other stakeholders, presented at the Map, are of the smaller importance in the AKIS, what can be also concluded from the connection lines (dashed – partial functional relations, or red line for non-existent but necessary relations).

SWOT analyses of AKIS in Montenegro

The AKIS system, presented in the Figure 1, was analysed in terms of strengths, weaknesses, opportunities and threats – SWOT, as follow:²

<u>STRENGTHS</u>	<u>WEAKNESSES</u>
<ul style="list-style-type: none"> – Diversified and heterogeneous agriculture and related food industries provide a wide base for AKIS – Small countries is in advantage to organise and connect the main stakeholders in AKIS – The state University (UoM) has developed the Research and development strategy in Agricultural sciences – Well-equipped labs, the experimental field provide a ground for knowledge transfer to the production – Advisory/Extension services in plant and livestock production have gained experience in linear knowledge transfer to the farmers 	<ul style="list-style-type: none"> – Many small fragmented family farms are not interested in knowledge transfer an innovations – Top down approach in the whole AKIS system dominates – Collaboration between actors in the food value chains are rather poor – Knowledge transfer from researchers to the farmers is very weak due to lack of researchers interest in the practical technological solutions – The advisors’ experience in the AKIS facilitation and moderation is rather weak. – Trainings of the advisors are mainly focused on the implementation of the agripolicy measures – Low level of digitalisation of primary sector in agriculture. – Generally, proactive role in adoption of the new technologies and innovations is rather poor

² The key SWOT characteristics of AKIS are presented in the table, with the essential characteristics of the agriculture very relevant for the AKIS.

<ul style="list-style-type: none"> - The Ministries (MAFWM, MoS and MED) provide legal and strategic frame supportive for AKIS 	<ul style="list-style-type: none"> - The official advisory service is becoming a part of administration – thus advisory role is diminishing - Poor state financial support for the key elements of the AKIS
<p style="text-align: center;"><u>OPPORTUNITIES</u></p> <ul style="list-style-type: none"> - General fast modernization of agriculture and food production is a driving force for enhancement of the AKIS - Implementation of the strategic state documents, particularly Smart Specialization Strategy, gives a wide range of possibilities for AKIS - Young people with higher education enter to agricultural activities as their own business - EU accession in agriculture opens a wide range of the possibilities - The national and international research projects are more directed to the industry what opening new possibilities for AKIS 	<p style="text-align: center;"><u>THREATS</u></p> <ul style="list-style-type: none"> - Migration of young people from the countryside to the cities causes many negative trends and consequently lack of interest in AKIS - Poor public perception of agricultural studies, instability of funding and insufficient investment in science and scientific infrastructure; - Insufficient respect of the importance of knowledge and innovations in development of agriculture and food sector - Short-term instead of long-term visions of businessmen in the food sector - Inertness of businesses in terms of investments and participation in scientific projects - Difficulties in attracting young candidates for research in agricultural sciences

The general comment of this SWOT table is that Montenegro as a small country, not burdened by the old institutional frame or overlapping of the institutions, could establish a good frame for the AKIS, supportive for faster development of agriculture and food sector. However, in the reality it is not a case. Many weak points in the AKIS structure still exist and collaboration among the key players is not at a satisfactory level. There are a lot of examples for this statement, just to mention poor collaboration between the key ministries and the absence of collaboration of the National advisory service with Advisory service on local level.

The AKIS Road Map

Based on the AKIS Map and the SWOT analyses, presented in the previous pages, the Roadmap encompasses 6 priorities, as follow:

- 1. Development of the functional AKIS**
- 2. Establishment stronger links between AKIS actors, especially between the research and farming sector**
- 3. Providing Advisory/Extension service in agriculture being fully functional and meets farmers' needs**
- 4. Capacity building of the key AKIS players**
- 5. Supporting digital transition in agriculture**
- 6. Raising public awareness on the importance of AKIS**

Priority 1: The functional AKIS with holistic approach is needed

- ✓ Strategic and program documents, with detailed action plan for the AKIS have to be developed
- ✓ Adopt a National Partnership Programme of all AKIS' related organisations
- ✓ Legal frame has to be completed, with rules for the public and private, local/national advisory service
- ✓ Forming of the AKIS Coordination body
- ✓ Research and innovation infrastructure to be completed
- ✓ Clear financial rules for support and stable state financial support for AKIS
- ✓ Reporting, evaluation and control practices is the essential

Responsibility: The main responsibly entities for the activities in this priority area are three ministries: MAFWM; MoS and MED (Fund for innovations). These ministries have to collaborate closely with the other AKIS stakeholders, especially with the universities.

Active role of the stakeholders in the implementation

Resources: the National funds (all ministries budgets), donor funds, primarily preaccession support of EU.

Priority 2: Link of research and farming sector needs to be reinforced

To enhance of the knowledge flows within the AKIS through facilitating the interconnection between AKIS actors and to build the systematic connections between scientists, advisors and the farming community, by using modern tools (knowledge and innovation hub, food clusters, tehno and science parks), the focus should be on:

- ✓ Horizon Europe and other funds for the multi-actor projects, providing incentives for cross-thematic, multi-actors and applied-oriented projects
- ✓ Innovations projects and activities with stronger involvement of young educated
- ✓ Full implementation **Smart specialisation strategy**
- ✓ Close synergy between HE and IPARD is needed, which can be provided in tight collaboration of the MAFWM and the Ministry of Science
- ✓ Design a specific fund for after-project communication of innovative project
- ✓ Researchers have to share their work with practice, to work interactive with the advisors and farmers.

Responsibility: The ministries (MED; MAFWM; MESCS) in close collaboration with the academia (the Universities)

Resources: the National funds (the ministries budget), donor funds – primarily EU HE support, FAO and IFAD support projects.

Priority 3: Providing Advisory/Extension service in agriculture being fully functional and meet farmers' needs

With the aim to develop the functional system of advisory service, the key activities are:

- ✓ Linear knowledge transfer should be extended and strengthened because the agricultural sector at this level of development simply needs it
- ✓ The key advisors have to act as innovation facilitators, capturing future farmers needs and sharing outcomes of advisors' trainings, especially on innovative techniques and soft skills
- ✓ The whole value chain approach, dialogue with society should be reinforced
- ✓ Involvement of private advisors: not only in training but in information flows
- ✓ To organize systematic trainings for advisory staff members for developing a career path and raising competences in an organized manner and continuous updating of knowledge
- ✓ To form country wide advisory networks to share generated knowledge after visits abroad
- ✓ Simplify administration and avoid dense control systems, instead develop indicator of quantitative monitoring
- ✓ In addition to active role in the implementation of the agricultural policy, the advisors have to be involved in the definition of the policy and programmes in an early stage

Responsibility: MAFWM in close collaboration with the key stakeholders

Resources: the National funds (the ministries budgets), donor funds - support of EU, WB, FAO and IFAD support projects.

Priority 4: Capacity building of the key AKIS players

Fast progress in applying new technologies and innovations in agricultural sector, parallel with more and more challenges the sector face require permanent work on capacity building of the AKIS players. Hence, the main activities are:

- ✓ Regular education, trainings, lifelong learning accessible to advisors and farmers
- ✓ Regular winter and summer educational events (schools, on spot and demo trainings etc.)
- ✓ Advisors acting as innovation facilitators, capturing needs and sharing outcomes of advisors' trainings
- ✓ International cooperation providing the adoption of good practices
- ✓ Support advisors' placements in experimental research centres and training facilities,
- ✓ Support methodological and social competences of advisors
- ✓ Educating and training AKIS 'system-oriented' advisers.
- ✓ Mandatory education for young farmers
- ✓ Establishing advisory Licensing Program

Responsibility: MAFWM and MoS in close collaboration with the key stakeholders

Resources: the National funds (all ministries budgets), donor funds - support of EU, WB, FAO and IFAD support projects.

Priority 5: Digitalisation of the agriculture

In order to improve the flow of information and innovative solutions for agricultural practices, the unavoidable tasks are:

- ✓ **Interlink all public data** to enable additional services, GIS/LPIS based layers combining: soil, animal welfare, spreading harmful organisms, irrigation needs
- ✓ Organize training on digital skills for advisors, farmers etc.
- ✓ Build knowledge that are interactive and quality checked, and use common standards as much as possible
- ✓ Set up platforms to discuss how to manage the digital transition
- ✓ Share digital advisory tools, reducing the maintenance cost
- ✓ Provide tools to facilitate the transfer of knowledge in agriculture (computer software and hardware, digital applications, internet access, knowledge transfer platforms, databases, etc.)

Responsibility: MAFWM and MED in close collaboration with the key stakeholders

Resources: the National funds (all ministries budgets), preaccession support of EU, support projects of FAO and IFAD.

Priority 6: Public awareness raising on the importance of AKIS in agrifood sector

There are still negative aspects of public perception on agriculture, like opinions that the sector does not need knowledge and educated producers, consequently AKIS is not one of the key developmental priorities. In order to change that situation, permanent need is to work on raising public awareness in several directions:

- ✓ Networks for informal knowledge exchange
- ✓ Medias electronic and written – to improve coverage of agricultural issues by mass media and put agri-innovation in the spotlight
- ✓ Ensure better quality information about farming issues
- ✓ Infrastructure for promoting knowledge exchange among researchers, advisers and practice
- ✓ Ensure a substantial budget for communication and dissemination of research and innovations

Responsibility: MAFWM, MoS and MED in close collaboration with the key stakeholders

Resources: the National funds (all ministries budgets), support of EU, support projects of FAO and IFAD.

The AKIS Action plan

The Road Map from the previous chapter was developed to the Action plan, with needed elements for each of the six objectives, as presented in the following table.

Required actions	Milestones	Deliverables	Resources needed	Deadline	Impact ³	Feasibility
Objective 1: To develop the functional AKIS⁴						
1.1. Strategic and program document, with an action plan	Government decision on strengthening AKIS is taken	The strategic document/s as a base for the next steps adopted	The mutual team of MAFWM and MoS, incl. state financial support	The middle of 2023	7	4
1.2. To develop the National Partnership Programme (NPP) of all AKIS' related organisations	NPP is developed	NPP is adopted	MAFWM and MoS, incl. state financial support	The end of 2023	6	3
1.3. To complete legal frame, with rules for the public and private, local/national advisory services	The Action plan – a list of legal docum. needed for AKIS is developed	The AP is adopted by the Govern. The legal frame is completed	The mutual team of the MAFWM and MoS, incl. state financial support	The end of 2024	7	4
1.4. To strengthen research and innovation infrastructure	The Guidance for RI is developed	The Guidance is adopted by MoS	MoS, financial support	Permanent	6	5
1.5. Gathering representatives of all AKIS actors with the aim to agree upon governing the AKIS	AKIS platform with Coordination board (CB) is formed	Rules are settled and Coordination board (CB) is functional	Govern. financial support + expert support	The middle of 2024	6	3
1.6. To develop guidance for reporting, evaluation and control practices	The Guidance is developed	The list of the key indicators is developed	The CB fully engaged, with govern. financial support	The end of 2024	7	3
Objective 2: Establishment stronger links between AKIS actors, especially between the research and farming sector						
2.1. Regular face-to-face exchange thematic events and meetings between research, farmers and advisors	The knowledge and innovat. hub is established	The hub operational rules are adopted	MoS; MAFWM, univers. support	The end of 2023	6	4
2.2. Participation in the multi-actor projects of HE, with focus on cross-thematic and	The rules of incentives for the farm sector participation in	Number of the HE projects with farming sector	MoS financial and admin. support	Permanent	7	3

³ In the last columns (Impact and Feasibility) - 1 means the least; 7 means the highest impact or feasibility

⁴ The abbreviations used: MAFWM – Ministry of agriculture, forestry and water management; MoS – Ministry of Science; MED – Ministry of economic development; MFI – The innovation fund of Montenegro.

transdisciplinary approach	HE projects are developed	participation is increased				
2.3. Innovative projects with stronger involvement of young researchers	The guidance of incentives for YRs is developed	Number of innovative projects with YRs particip. is increased	MoS financial and admin. support	Permanent	6	4
2.4. The implementation of Smart specialisation strategy	The S3 is developed and adopted	Flagship initiatives are functional	MED - financial and administer. support	The end of 2022	7	5
2.5. Close synergy between HE and IPARD	List of the research topics relevant for IPARD is developed	Number of the realised projects relevant for IPARD is increased	MoS and MAFWM	Permanent	5	3
2.6. To create fund for after-project communication of innovative projects	The document with key elements of the fund functioning is developed	The Fund document is adopted First fund users registered	MoS financial and administer. support	The end of 2023	6	3
2.7. To establish the operational groups	The first operational groups are formed	Three OG are functional (Wine, Be-keeping, Organic production)	MAFWM & MoS, EU support	The end of 2023	6	3
Objective 3: Providing Advisory/Extension service in agriculture being fully functional and meets farmers' needs						
3.1. Strengthening of the linear knowledge transfer	The plan of the needs for advisors is developed and adopted	The plan is adopted and implemented	MAFWM administr. support	The end of 2023	5	4
3.2. The key advisors acting as innovation facilitators, capturing future farmers needs	The rules of the incentives for innovative advisors are developed	The reward system is implemented The number of rewarded advisors is increased	The MAFWM administr. and financial support	The middle of 2024	7	3
3.3. To enhance the whole food value chain approach	The guidance with clear instructions is developed	New advisors from non-primary production sectors are recruited	MAFWM	Permanent	7	3
3.4. Involvement of private advisors in training and information flows	The rules for the private advis. involv. are developed	The rules are adopted	MAFWM	The middle of 2024	5	4
3.5. Country wide advisory networks to share generated knowledge after visits abroad	The network is established	The periodical reports are produced and publicly available	MAFWM administr. and financial support	The end of 2024	5	4

3.6. Developing indicators of quantitative monitoring	The CB developed list of the key indicators	The key indicators are used in the monitoring of the advisors results	MAFWM & MoS	The middle of 2024	6	4
Objective 4: Capacity building of the key AKIS players						
4.1. Regular education, trainings, lifelong learning accessible to advisors and farmers	The plan of education, training and LLL of the advisors is developed and adopted	The plan is implemented Trainings of the trainers, workshops, demonstr. are regularly held	The MAFWM	The end of 2023	7	3
4.2. Regular winter and summer educational events (schools on spot and demo trainings etc.)	The plan of winter and summer schools is developed and adopted	The plan is implemented – the schools are regularly organised	The MAFWM together with universities	The end of 2024	7	4
4.3 Support methodological and social competences of advisors	The CB developed the plan	The CB plan is being implemented	MAFWM & MED and MoS	The middle 2024	5	3
4.4. Establishing the Licensing advisory Program	The legal frame – rules are developed	The LAP is implemented	MAFWM administr. and financial support	The end of 2024	6	3
4.5. To implement of mandatory education for young farmers	The education program is developed	The EP is adopted and implemented	MAFWM, supported by EU funds	The middle of 2025	5	3
4.6. International cooperation providing the adoption of good practices	The concise plan is developed and adopted	Good practices are presented at regularly organised events	MoS supported by the universities	The middle of 2024	5	3
Objective 5: Supporting digital transition in agriculture						
5.1. To interlink all public data to enable additional services, GIS /LPIS, soil, animal welfare...	The fund for innovations (MFI) developed the knowledge and innovation platform	The platform is functional, public data are accessible	MED (MFI), donor support	The end of 2024	7	5
5.2. To build knowledge that are interactive and quality checked, and use common standards	Clear guidance on the data flows is developed	The AKIS players widely use data from the platform	MED (MFI), EU and other donor support	The end of 2025	6	4
5.3. To set up forum to discuss how to manage the digital transition	The forum is established	Permanent dialogue of the users is regular	The CB is in charge	The middle of 2025	5	3
5.4. To organise trainings on digital skill for advisors and farmers	The guidance with the instructions is developed	The system is functional - Trainings are regularly organised	MAFWM & MFI, EU support	The end of 2025	6	4
Objective 6: Raising public awareness on the importance of AKIS						
6.1 Strengthening rural multi-actor innovation networks, incl. informal knowledge exchange	The network is established, the rules of	Gathering information, promoting learning,	MAFWM and universities	The middle of 2024	5	3

	functioning are developed	enhancing farmers role in knowledge creation				
6.2. To provide budget for dissemination of research and innovations including infrastructure for promoting knowledge	Guidance with support instruments for dissemin. of research results is developed	The system is in place, the project teams use that budgetary support	MoS and MFI	The end of 2023	5	3
6.3. To improve coverage of agricultural issues by mass media and put agri-innovation in the spotlight	Memorandum of understand. between the CB and the national RTV is signed	Regular Radio and TV programs devoted to the agrifood sector, open discussions are on the national public media	The CB	Middle of 2023	5	7