

## CASE STUDY

### "SMALL SCALE PERI-URBAN MOSAIC IN MONTEMOR-O-NOVO" (PORTUGAL)

D4.1 | Final Version | 22/06/2016

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## 1 Introduction: What is the case study about?

As described in WP3 report, the study takes place in the municipality of Montemor-O-Novo, in central Alentejo. An important characteristic of this area is its rurality with the proximity of Lisbon, and along the main axis of exchange between Lisbon and Madrid. The overall landscape is dominated by large scale extensive silvo-pastoral systems, in large estates ranging in size from 100 to 1,000 ha. In the surroundings of the municipality main town, as well as in the other, smaller, towns, the landscape is composed of a characteristic small-scale mosaic of farm units between 1 and 5 ha, sometimes up to 20ha. The total area occupied by these small scale-farms is small in relation to the remaining large scale estates. However, as it is the small scale mosaic that is visible from the towns this becomes of foremost importance to the inhabitants relation to the local landscape. The case-study area is this specific small-scale mosaic landscape.

This mosaic landscape, composed of land use processes hardly taken in account by authorities in their different policies at the various scales, is nevertheless a provider of ESBOs. The analysis focuses on two ESBOs. Firstly, *sustainable food production*. Small scale farming in Montemor-o-Novo is composed of:

- a) older traditional farmers, who have done this activity all their life but see it more as a subsistence activity, even if they sell part of their products,
- b) lifestyle farmers, who have moved into the area due to the attractiveness of the rural ambiance, the local landscape and the proximity of the city of Montemor, but also practice farming in their land;
- c) some new farmers who see farming more as their main activity and develop it as high quality niche productions mainly as organic or biodynamic;
- d) there are also land owners who use the farm as a secondary/weekend residence and do not use the land themselves, but let the land be used by other, small farmers without their own land, so these farms also are kept as productive farms.

All of them are producing the traditional farm high quality products in the area, as olive oil, olives, sheep, vegetables, fruits, and thus supporting the Mediterranean diet for themselves and their families. Further, when selling the surpluses, almost all aim for short supply chain. Nevertheless, in this last case, they face constraints in accessing to the market, due to their small size. This may be more asserted, providing a more decent life to the producers.

Secondly, *rural vitality* has been identified as a potential important way to unlock synergies in this context. The attractiveness of the small scale farms to new comers, together with the proximity to the small town of Montemor and the interaction of new actors with the local ones, has created a vital rural community, which maintains its rural character but also has been renewed. Most important, the separation between social spaces which often has been described in literature as the process which takes place when new comers of different types settle in the rural scape, does not seem to take place here, where a new and mixed community is being shaped. This happens probably due to the complex pattern of actors and to the traditional hybridity of Mediterranean rural relations. A lot is possible to do here for the future: several ESBOs' provision at the same time, especially in terms of collective actions, as we will see later in this report.



The present case study pays particular attention to the farmers and their collective actions, their linkage with the other actors of the SES without forgetting the valuation of the key stakeholders on the field. This is why we identified and studied the action of several relevant other actors for our case study.

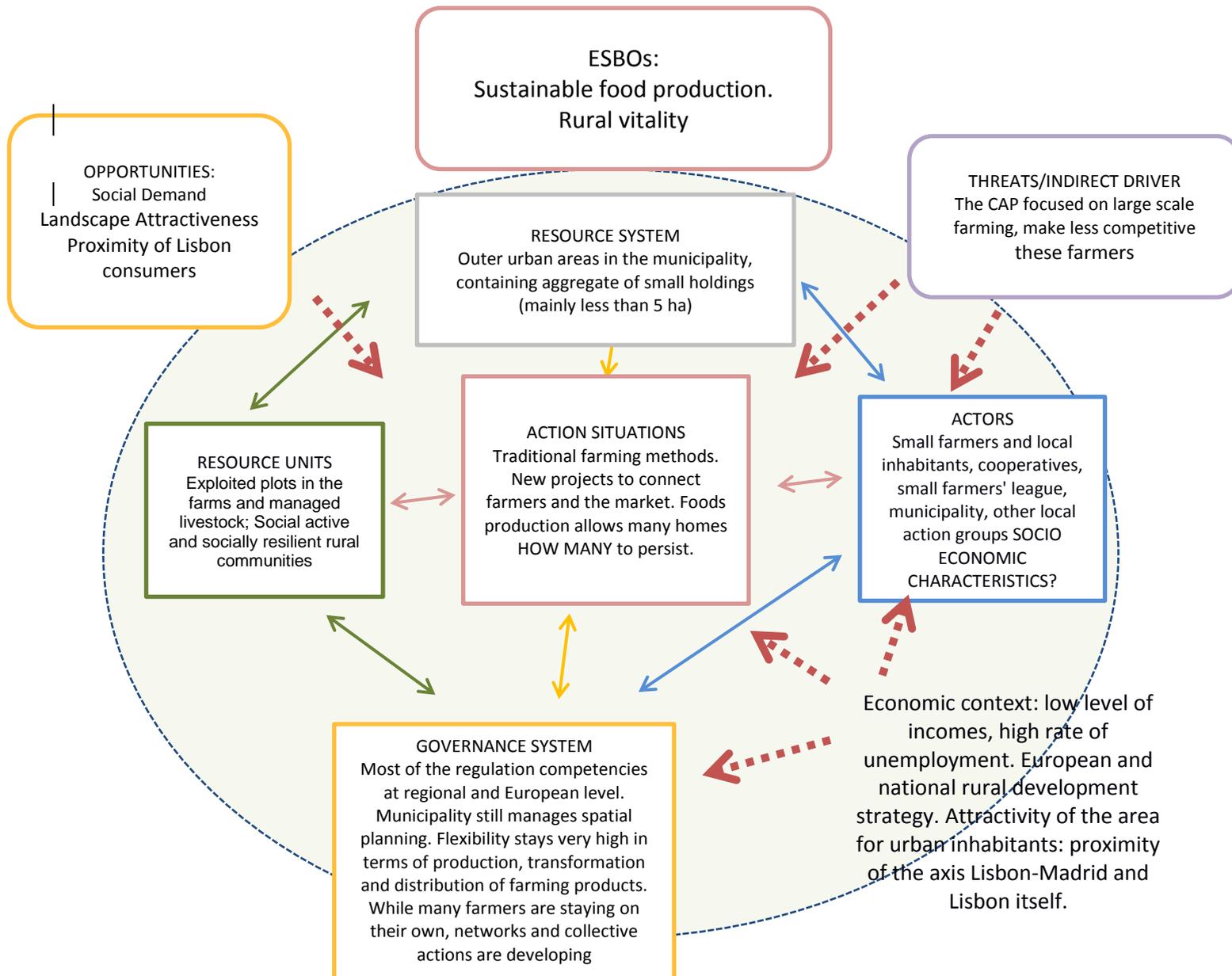
The direct actors are the small farmers- but these are of different types, as described above. Furthermore, there are formal actors, as the municipality of Montemor O Novo, a recent local cooperative of producers named Minga, a farmers syndicate called LPMA, specialised associations, aiming at cultural, environmental or economic outlets such as bee keeping and honey production and hunting.

As informal actors there are first and foremost the consumers, local consumers or consumers linked to the farmers by direct sales in short supply chains, and a citizen network named *Rede de Cidadania de Montemor-o-Novo*, who has as main goal to contribute to the sustainability of the municipality and has engaged much in the preservation of small farms and local production.



## 2 Definition of the social-ecological system (SES) studied

### 2.1. Figure of the SES, using the SES Framework



### 2.2. Short characterisation of key drivers/motivations

#### *External drivers of change*

Looking at the external drivers, the globalized nature of the market of food products influences the competitive capacity of small farmers for the provision of food products, in



terms mainly of regularity of the distribution, quantity and certainly of price, and this even in the small farmers are rarely directly connected to the global market.

Mentioning economic concerns, the policies at European or national scale are indirect drivers for this SES, as the small farming are not mainly targeted, while other farming types (larger ones) receive support. Thus these policies have mainly an influence on the activity of the competitors on the market: the financial aid for investment as well as subsidies for production allocated to the larger farmers allows them to be more competitive in the global sphere. This can lower the turnover for the small farms and the market chains they have access to, which can lead some local actor to consider that Europe is distorting competition.

However, the demand for local products in the local market and through short supply chains has been increasing slightly, as are observing small farmers involved in these networks. Consumer attitudes, mainly of urban and more informed consumers have been changing in the sense of more awareness of quality of local products; in a certain way, societal demand for this type of farming and local products is increasing, turning it as an opportunity.

The high rates of unemployment existing since years in Portugal, show an important influence on the structure and the operation of the small farms system. The study area is attracting entrants, who search for better life quality, but also others who search for a way to sustain their households, and farming is progressively seen by more and more as an alternative. Farming also remains an important way of contribution to the household income for the traditional farmers/ land users, which through food supply also support the others in the family, namely the younger generations.

By the other side, the municipality expresses the will to maintain small farms and small farmers. This allow the urban plan to be managed accordingly and the support of local action groups: some formal, such as *Minga*, a new distribution cooperative, *Liga dos Pequenos e Médios Agricultores dos Concelho de Montemor-o-Novo* (Union of the small and medium farmers of the county of Montemor-O-Novo), or other informal, like *Rede de Cidadania de Montemor* (Montemor citizenship network), or farmers organized as local products distribution groups. These local action groups, are also promoting awareness campaigns for the importance of healthy food and food changing according to the seasons, thus linking to local production, with the support of the municipality. Nevertheless, so far the municipality has not engaged in grounded projects aiming to cope with some of the constraints felt by small farms, like the distribution or the legal requirements imposed by the national legislation which is focused on large production units. Some domains like the collective consumption, which is managed by the municipality for schools and third age homes, could engage in using local products, thereby supporting directly small farms, and despite this mechanism being used in other municipalities in Portugal, it is not yet used in Montemor.

All of this can be considered as a facilitator of social capital, granting more fruitful connexions between the local actors. People involved on the local animation remarked that, despite many common objectives, small farmers remain in an individualist logic. Recent entrepreneurs (with a highly educated profile, often newcomer) have invested in the construction of a resilient network in order to then help securing the small farms production model, which should be local, qualitative, fair and environmental friendly, as suggested by the following interview's quote :



*« Farmers distrust already a lot, so we can't implement cross control. We have to build a relationship based on trust: what is important is the commitment, and feeling what is important (aka : the value system). » (Administrator Minga cooperative)*

### **2.3 Description of other important variables chosen**

A lot of small farmers are producing for their own consumption. But a lot of them are also part of a barter system or even connect with the local market. More than a hobby, this very often represents a way to sustain the household and sometimes an important part of the income. So it might be interesting to relate to the way farmers are connecting to consumers, as a way to maintain their activity.

The different reasons for local people to start being or to remain small farmers are diverse. A common discourse about the importance of consumption of local and quality food keep on amplifying within both producer's and consumer's minds. This is related to health but generally to a more environmental friendly lifestyle. The attractiveness of the local landscape and a dynamic rural community are strong motivations to move into the area.

Concerning to demographic trends, it has been identified the progressive substitution of the ancient owners, which normally were also farmers and involved the whole family in farming, by newcomers, living there or just for the weekend, attracted by a different lifestyle (small farming, rural landscape). Succession is not a problem but often not as farming but as residential areas.

Also it could be interesting to take in account, the fact that the land prices have increased, already in the 90s and 2000s, due to the demand from external buyers. The price of the land does not correspond to its production capacity, but to its amenity value, related with the landscape, proximity to Lisbon, social networking and quality of life.

### **2.4. Discussion of the SES**

#### ***Economic crisis and limited access to land, markets and credits***

The economic crisis made urban people search for other opportunities, and thus made small scale plots attractiveness as a support of farming as an economic activity. Some young qualified families have moved to Montemor in the last 8 years, to take care of family farms which were out of use for one or two generations or were used extensively while they could have a more intensive use. This also means they have moved into houses which were left with no inhabitants for the last one or two generations. Further, two land banks have been created in the municipality, one by the Rede de Cidadania, where owners who do not use the land have made this land available, in small plots, for people who would make a vegetable garden, and another by the Liga dos Pequenos e Médios Agricultores, making municipal land available also in small plots also for vegetable and fruit production. In both cases the use of the land has no costs, only the water for irrigation may have costs. Part of the new producers in these plots are people who are unemployed and arrived to Montemor some years ago. In this way, the economic crisis has led to a higher social value attributed to farming, thus a collective awareness which has been changing.

#### ***Lack of regulation and support to small farming***

Local government expresses the interest to stimulate and support the SF (small farms). But there is no local legal framework due to the dependence of the central government and



alternative solutions should be implemented, as changed criteria for the selection of suppliers for the collective canteens. This is still not done in Montemor. There is a Km0 school canteen, but only partial and only functioning one day a week – thus a very limited impact on the local production. The will of the informal citizen network helped to gather the actors and to show to the municipality that it was possible to build with small farmers.

### ***Cultural changes in citizens environmental awareness and social-eco movements***

It was identified that most of the old farmers don't know how to use the bureaucratic mechanisms to sell in a legal way their products. For this, there are a lot of people with high education to support the SF by going to the farm. They want to promote and believe in local economy, to buy, to help labour, and to support sustainability and also to introduce ecological ideas.

The main impact in this case, is the increase of local production, making possible the production, and the creation of new economic models in the area, as the cooperatives, that promotes participation, democracy and sustainability.

### **2.5 Common aims, conflicting interests and goals**

First of all, it is important to remark that the farmers are aware of their condition of ESBOs keepers, as one of them said: “we know that what we are doing is good for the society, for the environment, and so on, and we are trying to keep/develop this”. This awareness, with the increasing social demand of this type of local production and economic models (cooperatives), turn into a common aims, that allows to establish some kind of balance between informal local production and formal (legal) ways to enter into the market.

Nevertheless, some consumers still think the local products are more expensive than those they can get in the supermarket, and therefore choose to buy there.

Secondly, the price of the land is a considerable issue here. Land prices tend to increase due to the residential interest in the area. Thus, the price of a farm unit has nothing to do with its production capacity, but with its amenity value. This means the land is not considered as a production factor, and is not accessible for those who want to use it like that. As many land owners are not using their land, even though they use the house, there is still land available for those who want to start farming – but the conflict or tension is eminent. As more people would aim to start farming, the scarcity of land will be an issue.

## **3 Status of the SES and potentials**

### **1.1 Description of the SES**

In this case study, small scale peri-urban mosaic in Montemor-o-Novo, are established different relationships between the main actors and the indirect actors which configure the way of farming and decisions taken.

Firstly, small farmers often claim the use of non-traditional farming techniques. Traditional according to the farmers = conventional agriculture (with use of chemicals, intensive practices). This happens because lack of money but also the knowledge on how to use these technologies is missing. Although Alentejo has a long history about networking, and in this



case some of the small farmers are organised in cooperatives, it was identified that there is not a really exchange of information between them. This is very important when we talk about traditional ways of farming that some of them are demanding but don't have the information. Also, as we said before, this knowledge it is related to the actions between farmers and market, conditioning the way the farmers make decisions about the management of their land.

Secondly, the governance systems in this case, doesn't have an active role, due to the fact of the lack of law, making remain the municipality as a supporter of local initiatives but not as a promoter. Nevertheless, the existence of the CAP subsidies, determine in some way, some of the decisions of the small farmers.

Thirdly, the economic context determines somehow the configuration and the establishment of new social relationships. The low level of incomes and the high rate of unemployment but also the attractiveness of the landscape, and the proximity to Lisbon make that the area is attracting new farmers and new ways to recover the lands that were abandoned.

## **1.2 Relationships between farming and forestry, and the quantity and quality of ESBOs**

Relation between farmers and food production: because of the need to sell, can be analysed through the relation between farmers and market, and because it's a small relation through the relation farmers and consumers. In one hand, consumers demand for a certain regularity (have the whole year access to a specific vegetable) and for a certain way of production (organic). On the other hand, farmers have also some agronomic concerns (e. g: need to grow some legumes for their interest to the soil) that don't always match the demand. Also consumers don't usually recognize the local varieties. The development of these issues make possible the maintenance of this ESBO

As the farmers work a lot by their own, connecting to useful networks when necessary and useful, maybe they don't recognize the rural vitality as it is. As shown by the citizen network, the exchange of work is not a common habit.

However, farming plays a role for the maintenance of people in the countryside. People are working there instead of somewhere else, also useful to conserve small holdings (the more there is farmers, the lower the average surface per farm there will be) and so people close to each other. Farming can help maintaining rural communities. But also, farming can have benefit from rural communities: creation of collective actions, as it will be described in part 3.5, the word-to-mouth have been really important.

## **1.3 Key motivational, institutional and socio-economic factors**

As it's described above, there are some key motivational, institutional and socio-economic factors:

- The market and social demand (also with the canteens, the restaurant, and the availability of them and of the farmers to adapt to each other)
- The access to knowledge.
- The high level of awareness of the farmers, old farmers and new farmers.
- Local initiatives supported by the municipality. (KMO, Minga, ...)



- The proximity to Lisbon.
- The economic context.

#### 1.4 Levels of provision, trends and determinants

Regarding indicators of ESBOs provision, we can establish the importance of:

- Social performance measures: Having two scales of analysis: farm level and local level (kilometre zero). The increasing relationships between these two scales, show that food security and also rural vitality, the ESBOs that are identified in this case study, are also increasing in their quality and quantity. Nevertheless is needed to develop more indicators that involved the governance system, and also other cross-sectional areas, such a gender issues.
- Ecological performance measures: In terms of resilience in farming system it may be the capacity of production over time, after periods of crisis (resilience according to Darnhofen 2014).
- Externalities to other SESs: landscape, water quality, nature conservation,...

#### 1.5 Relevant governance arrangements and institutional frameworks

The local market network and the citizen network: Based on a horizontal structure, promote a friendly environment and the exchange of information. This network has an important paper concerning the connexion of the farmers to the market, and convincing them that it's possible to work all together, in a constructive way although they are "competitors" with their products at the market (often align their prices and adopt close marketing practices)

Minga: other example of a collective action that allows the local small farmers to sell more. If their activity become more profitable, it's possible for more people to live from the activity of small farming. Minga has 4 rules:

- Working with small farmers requires an horizontal structure in the management of the cooperative
- Provide to consumers as much as possible local food → km 0 initiative
- Avoid a too heavy environmental impact
- Offer to the consumer products at a fair price"

## 4 Conclusions derived from analysis in Steps 1 and 2

#### 1.6 Key findings on the particular SES and its potentials

As it's described in the point 3.3, there are some key motivational, institutional and socio-economic that are as well potentialities:

- The market and social demand
- The access to knowledge.
- The high level of awareness of the farmers, old farmers and new farmers.
- Local initiatives supported by the municipality. (KMO, Minga)



- The proximity to Lisbon.
- The economic context: economic crisis, low level of employment, etc.

In this particular case, the municipality it is configured as a big potential actor in order to improve and promote and assure the quantity and quality of the ESBOs, nevertheless it needs an institutional and law framework for working on this.

### **1.7 Governance arrangements and institutional frameworks**

In this case study, governance arrangements are mostly those previously described, of the joint organization of small farms to have better access to markets (Cooperativa Minga), or to receive technical and administrative support (Liga de Pequenos e Médios Agricultores), or even to motivate consumers for local consumption patterns (Rede de Cidadania). The institutional frameworks are lagging behind. There are some recent and relevant mechanisms created within the Rural Development programme, but still not set into practice. Since the existing institutional frameworks, as CAP and national regulation, remain not concerned by these type of farming, the construction of a local institutional framework adapted to the territory and its people would be a most significant improvement of conditions of small farms.

### **1.8 Other enabling or limiting factors**

As described before, the access to knowledge and the difficulty with bureaucratic mechanisms could be limiting factors but not determining factors, on the provision of the ESBOs.

### **1.9 Reflections on the case study methodology used and potential improvements**

The case study methodology have some powerful tools to sketch out this particular case, as the key actors and activities, mechanisms and initiatives, but also to identify motivational, institutional and socio-economic factors that affect the particular SES. The Sketchpad Table and the Sketch Map were very useful to analyse the demand and the appreciation level for the key ESBOs.

## **5 Research and action mandate for Steps 3 and 4**

### **1.10 Agreed objectives of activities to be undertaken with initiative/stakeholders**

Since April, the Dynamo research group is involved in a Horizon 2020 project SALSA “Small farms, small food businesses and sustainable food security”. This project will surely bring relevant insights into the small farm case study of PEGASUS, as it is expected this area to be included in a reference region of SALSA (though not confirmed yet).

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