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TABLE OF CONTENTS

M-00288	**The Role of Energy Directives in Ensuring EU Energy Security and the Problems of Implementation in Ukrainian Legislation** Ievgenii Shulga, Nataliia Shynkaruk, Stanislav Shytyi, Ievgen Antypov	1-10
M-00289	**Postmodern Transformations of Tourism Development** Alla Pecheniuk, Alla Kiziun	11-20
M-00290	**Redressing Policy Making in Pastoral Areas of the Mediterranean Region** Michele Nori	21-32

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M – 00288 | Review Article

The Role of Energy Directives in Ensuring EU Energy Security and the Problems of Implementation in Ukrainian Legislation

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ABSTRACT

This article attempts to analyze the role of energy directives in ensuring energy security of the European Union, as well as the analysis of the current state of their implementation in the legislation of Ukraine in accordance with the Treaty establishing the Energy Community and the Association Agreement with the EU. The development of legal security of energy sphere in the EU from the Treaty of Paris on the European Coal and Steel Community to the fourth energy package, which allowed to provide the development of competition among producers and suppliers of energy resources, to provide equal access to the energy distribution and gas-distribution networks, to liberalize the energy sector and energy resources, to increase the use of green energy, to reduce emissions into the atmosphere, and to raise the level of energy security in Ukraine. In this article, authors have used the systematic approach and legal method analysis of the implementation process of EU Energy Directives in the Ukrainian legislation, in particular the Law "On Natural Gas Market", the Law "On Electricity Market", the Law "On Energy Efficiency", the Law "On Energy Land and Legal Regime of Special Zones of Energy Facilities", and the Energy Strategy of Ukraine till 2035 "Security, Energy Efficiency, Competitiveness".

Keywords: Energy security; EU energy directives; Energy packages; Energy legislation; Environmental security

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1. INTRODUCTION

Energy security of the State is a key factor in the development of the economy and the pledge to ensure normal conditions for society. However, today the level of energy security in Ukraine is far from optimal, as evidenced by the constant growth of tariffs for energy resources compared to the falling level of incomes of citizens, monopolization of the energy sector and significant dependence on imported energy resources (Hrabinsky and Krychkovsky, 2016). The Ukrainian energy sector is also weakened by the completion of the Nord Stream 2 gas pipeline, which will obviously reduce the volume of gas transit through the territory of Ukraine. In addition, the global fuel and energy crisis is gaining momentum, which has caused a global shortage of natural gas and a fivefold increase in its price in the fall of 2021. The global energy crisis is deepening. At first, there was not enough gas, and now there was not enough oil. This situation determines the need to improve energy efficiency and the search for new mechanisms to ensure energy security of the State. To date, among the energy import-dependent countries, this is best achieved by the EU members that pursue a common energy policy and are guided by imperative and binding energy directives (Khalova et al., 2018).

Ukraine, choosing the path of European integration, joined the energy community and signed the Association Agreement with the EU[1], undertook to implement a number of EU Directives[2] (Pavlyuk, 2016), in particular energy directives designed to improve energy and environmental security, to bring energy legislation and the energy sector itself closer to European standards, to create common energy markets. To date, Ukraine has implemented the second, and is in the process of implementation of the third, energy package, but the situation in the energy sector is not changing for the better, making it necessary to study its implementation. To this end, it is necessary to analyze the experience of legal provision of EU energy security, energy directives (Kulovesi and Muñoz, 2011) and peculiarities of its implementation in the domestic legal framework.

The goal of this article is an attempt to analyze the role of energy directives in ensuring energy security of the European Union, as well as to analyze the current state of its implementation in the legislation of Ukraine in accordance with the Treaty establishing the Energy Community and the Association Agreement with the EU.

2. LITERATURE REVIEW

Different issues related to energy security of European Union and it's development have been studied by a number of scholars. Scheepers et al. (2007) in their research "EU standards for energy security of supply" studied an instrument to help to the EU and MS to shape and adapt their energy policies with a view to supply security. It could, more in particular, be useful in the context of the Strategic EU Energy Review as proposed by the European Commission in its 2006 Green Paper on EU energy policy (EC, 2006) and as published in January 2007 (EC, 2007).

Matsumoto et al. (2018) applied time-series clustering approaches and three energy security indicators based on the Shannon–Wiener Diversity Index[3] (Shannon, 1948). The aim was to enhance understanding of how energy security of EU countries, in terms of energy supply, has evolved. An overall improvement in energy security in most EU countries between 1978 and 2014 was identified, with Denmark and the Czech Republic evidencing the greatest improvements. The main driver of improvement has been the diversification of primary energy sources.

Gracceva and Zeniewski (2014) present a novel framework to assess energy security and used this framework to develop a comprehensive approach to the interactions between climate change policies and energy security. The impact of a low-carbon scenario on one of these five properties (long-term robustness) will be assessed using a complex multi-regional energy system model. The results of their research demonstrate how this scenario induces structural changes along the whole energy supply chain, revealing dynamic vulnerabilities and trade-offs that are not adequately accounted for by existing indicator-based assessments.

[1] https://trade.ec.europa.eu/doclib/docs/2016/november/tradoc_155103.pdf
[2] https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=celex%3A32009L0073
https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=celex%3A32009L0072
[3] Shannon–Wiener index is an indicator for evaluating diversity.

Haas et al. (2011) attempted to elaborate historically implemented promotion strategies of renewable energy sources and the associated deployment within the European electricity market. Hence, at a first glance, the historic development of renewable energy sources in the electricity (RES-E) sector is addressed on Member State and on sectoral level as well as consequently discussed according to available RES-E potentials and costs.

Talus (2017) in his research illustrates the change in the EU's approach from markets and market mechanisms to increasingly intrusive public sector control. Not only is the public sector deciding what to invest and where, it is now also moving towards deciding which commercial projects should go forward and which should not. Instead of markets being driven by commercial logic, the motivations behind cross-border natural gas projects are often political in nature. This is not in itself uncommon since energy and politics have always been closely connected at global level. However, it conflicts with the EU's policies in this area, which are based on liberal market thinking.

Jonsson et al. (2015) screen and scope out a comprehensive suite of energy security aspects to be considered when assessing low-carbon energy scenarios and apply it using the EU Energy Roadmap as an example. Availability and affordability issues as well as security of demand matters and geopolitical security aspects are identified and discussed. External factors, e.g., future international climate treaties and international relations, are important for some energy security outcomes. A broader framing of energy security together with structured assessments on the security implications of energy transitions would benefit future EU energy policy.

At the same time, issues related to the implementation of the legal regulation of EU energy security in the legislation of Ukraine, in accordance with the Association Agreement between Ukraine and the EU, have not been studied and presented in sufficient detail.

3. LEGAL PROVISION OF ENERGY SECURITY IN THE EU AND ENERGY PACKAGES

For the EU, ensuring energy security is particularly important factor in economic development, and the import dependence on energy resources[4], poses the challenge of establishing a stable supply of hydrocarbons in sufficient quantity and quality. Although ensuring energy security is the task of each individual EU State, given the presence of State sovereignty (Lipková, 2011), in the context of the unification of European energy markets, certain geopolitical aspects (storage, transit and substitution) complicate the settlement of energy security at the local level and bring it to the superstate level of the EU.

The prototype of the European Union was the union of coal and steel between France, Germany, Italy, Belgium, the Netherlands and Luxembourg from 1952 (European Parliament, 1951), which made it possible to unite these States into an energy and economic European interstate association. The basis of this union was to create conditions for the free production and movement of products of the coal and metallurgical industries, thanks to the implementation of which it was possible to create a stable and solid foundation in such important sectors of the economy as energy and metallurgy (Khalova et al., 2019).

Later, the energy sector only increased its role in the new international institution, so in 1957, as part of the signing of the Treaty of Rome, the Treaty on the Establishment of the European Atomic Energy Community was signed. It regulated the integration of European countries in the field of the peaceful use of nuclear energy, which was seen by all European countries as an important and promising tool for solving the energy problem in Western Europe. Thus, it was planned to relieve the severity of the energy crisis, which primarily affected small Western European countries. However, the most significant event was the adoption by the European Commission of Directive 96/92 (European Parliament, 1996a) and Directive 98/30/EC (European Parliament, 1996b). The first one established the key principles of competition among producers and suppliers of electric power. The main goal of the directive was to ensure 35% of the annual electricity supply in the open market, the separation of electricity monopolies. The other established general rules for transportation, storage, distribution and consumption of natural gas and particular aspects of the organization of the gas market. This marked the beginning of the creation of a single European liberalized electricity and gas markets as well as the reform of the energy sector.

[4] According to Eurostat data, the share of energy resources imported by the EU is more than 70% EU imports of energy products - recent developments. Statistics Explained – 2019. Online: https://ec.europa.eu/eurostat/statistics-explained/pdfscache/46126.pdf

These directives formed the so-called First Energy Package. The EU Energy Package is a comprehensive set of legal acts aimed at responding to global and European climate change and energy challenges and integrating climate change considerations into a range of sectors and policies (Kulovesi and Muñoz, 2011).

The next step was the adoption of the Second Energy Package consisting of electric (2003/54/EC) and gas (2003/55/EC) (European Parliament, 2003c,d) directives that introduced equal access to the electricity and gas networks, development of competition, liberalization of the energy sector, and so on. The main goal was to create conditions for the development of fair competition in the European energy sector. In particular, this package formulated the requirements for the necessity of vertically integrated companies (in practice this meant that, for example, in the natural gas sector the activities of companies transporting gas must be separated from the activities of gas production and distribution). At the same time, this approach did not include "ownership subsidy". The package established two different specific timeframes for liberalization of electricity and gas sales on the retail markets, namely the beginning of 2004 for industrial consumers and the beginning of 2007 for private households (Pavlyuk and Khorolskyi, 2015).

However, scientists note that the implementation of the directives of the Second Energy Package has shown a lack of effectiveness, which was reflected in a high degree of monopolization in the energy sector by most of the EU member States. It was impossible to fulfill the requirement of a complete transfer of energy through the cordons of one EU member State to another. The energy markets of the member States were very weakly integrated, their functioning was not transparent, etc. (Khalova et al., 2018).

It should be noted that upon the adoption of the UN Framework Convention on Climate Change and the Kyoto Protocol, which limited the release of CO_2 into the atmosphere, it should be mentioned. The two Energy Packages did not focus on this issue, which weakened the EU's position in the fight against the release of carbon dioxide. That is why the European Council adopted the so-called "20-20-20" program without regard to certain difficulties in the implementation of the Second Energy Package. It stipulated 20% reduction of carbon dioxide emissions, 20% reduction of energy consumption within the EU and 20% replacement of the existing energy sources with renewable sources (EC, 2009). The Third Energy Package was developed to implement this program. It should be noted that the last one had some promising ideas for the parties, including the possibility of choosing the method of distribution of production, production and transportation, namely a full or partial division of ownership in the form of independent transport operator, and independent system operator (EC, 2011). Therefore, a special feature of the Third Energy Package was the prohibition of companies to sell and transport gas and electricity. At the same time, monopoly companies were asked to sell the transport networks or give their management to an independent operator. In addition, the documents clearly provide for guarantees of third-party access to gas transportation capacity.

The forthcoming energy package, "Clean Energy for All Europeans", was approved by the EU in 2019 and it consists of eight international documents that include requirements for the organization of local and pan-European energy markets. These are documents such as: Renewable Energy Sources Directive updated (EU) 2018/2001; Directive on the Energy Efficiency of Buildings (EU) 2018/844; Energy Efficiency Directive updated (EU) 2018/2002; Regulation on the Management of the Energy Union and Climatic Measures (EU) 2018/1999); Directive on General Rules for the Internal Market of Electricity (EU) 2019/944; Regulation on the Internal Market of Electricity (EU) 2019/943; Regulation on Preparedness for Risks in the Electricity Sector (EU) 2019/941; Regulation on the Establishment of the European Union Agency for Cooperation between Energy Regulators (EU) 2019/942. It is expected that their implementation will help accelerate and facilitate the EU's transition to renewable energy sources.

Formation of this package of legislative initiatives is one of the stages of implementation of the Strategy for the Creation of the Energy Union. The aim of the 4th Energy Package "Clean Energy for All Europeans" is to facilitate the transition from wasteful fuel to more environmentally friendly energy and fulfill the obligations of the EU Paris Agreement on Reducing Greenhouse Gas Emissions. The amendments proposed in the legislation will bring significant benefits to national economies, contribute to achieving carbon neutrality and strengthen the position of consumers.

Therefore, we can conclude that the development of legal security of the energy sphere in the EU has been taking place progressively over 70 years and has passed quite a significant period, from a purely economic goal in providing itself with energy resources to ensuring energy security. Energy Directives

that make up the energy packages allowed to maximize the level of energy security, ensured the development of competition among producers and suppliers of energy resources, provided equal access to energy and gas and water supply networks, liberalize the energy sector, introduce diversification of energy resources and their suppliers, increase the use of green energy, reduce the level of emissions into the atmosphere, improve energy efficiency, enhance the role of the consumer and energy security in general.

4. IMPLEMENTATION OF ENERGY PACKAGES IN THE UKRAINIAN LEGISLATION

Ukraine became a full member of the Energy Partnership on February 1, 2011 and has undertaken the obligation to implement into the national legislation the main acts of the EU energy legislation (Parliament of Ukraine, 2010). Ukraine's accession to the Energy Partnership offered opportunities and instruments for structural reforms in the energy sector. Implementation of European norms and standards - the Acquis Communautaire ("road map" - the main assets of the EU energy legislation) in the energy sector as well as in the environmental protection sector allows our state to progressively implement economic restructuring and follow the path of sustainable development.

The process of implementation of energy packages in Ukraine is at its beginning. Over the past few years, we can observe an active desire of Ukraine to cooperate with the European Union also in the issues of energy security, but this (process) takes place within the economic and political sphere. Adaptation of the legal regulation of the investigated tsarina today is done fragmented, unsystematically, which as a result, in many ways undermined their overall goal. This assertion is confirmed by a number of regulatory acts adopted by the Ukrainian Parliament aiming at reforming the energy sector. Thus, the adoption of the Law of Ukraine "On the Natural Gas Market" (2015) (Parliament of Ukraine, 2015a) declared implementation of the requirements of the EU Third Energy Package (Directive 2009/73/EC "On Compliance with the Internal Market of Natural Gas" and EU Regulation 715/2009 "On the Conditions of Access to the Natural Gas Transport") within the limits of the agreement signed by Ukraine on establishment of the Energy Partnership and envisages pursuit of liberalization and reform of the natural gas market and elimination of the single large-scale player of recent years, NAK Naftogaz of Ukraine PJSC, which produced oil and gas, their processing, transportation and storage, etc. on a single basis. The said law introduced the creation of a new model of the natural gas market aimed at ensuring fair competition and effective protection of rights and interests of all gas market participants, regardless of the form of ownership. However, to date, we cannot say that its provisions have been fully implemented, because now, except for the above monopoly companies in tenders for production, processing and other manipulations with energy resources, participate its affiliated companies and partners such as Ukrtransgas PJSC, Ukrgazvydobuvannya PJSC. Therefore, the expected result in the form of demonopolization was not achieved.

Within the framework of the Third Energy Package of the EU, the Ukrainian Parliament adopted the Law "On Electricity Market" (2017) (Parliament of Ukraine, 2017), which from 2019 introduced the possibility of selecting a supplier of energy services, competition and reduced prices for the buyer of electricity. However, the implementation of this law is hindered by general and subjective reasons, which include the regulatory irregularity of the implementation of parallel markets, generating capacities and the problem of accumulation of charges, detailed regulatory and technical infrastructure. Considering these and other reasons, the Representation of the European Union and the European Bank for Reconstruction and Development recommended to suspend the implementation of the new market of electric power in Ukraine (Parliament of Ukraine, 2019).

Moreover, the New Energy Strategy of Ukraine for the period up to 2035 "Security, Energy Efficiency, Competitiveness" of June 18, 2017, was developed in accordance with the above-mentioned laws, which is based on the principles of strengthening the development of renewed energy, in particular, increasing the use of "green energy", i.e. promoting the use of a green tariff on the part of the population and enterprises. With the purpose of stimulating the development of renewable energy, the Law of Ukraine "On Amendments to Some Laws of Ukraine on Ensuring Competitive Conditions for Production of Electricity from Alternative Energy Sources" was passed. "The "green" tariff is linked to the euro exchange rate; the "green" tariff for electricity from biomass and biogas was reduced by 10%; the requirements for local storage were lowered by 5% and 10% for the use of equipment of Ukrainian production at the level of 30% and 50%; introduction of "green" tariff for geothermal power plants, for

solar and hydroelectric power plants of private households up to 30 kW of capacity (Parliament of Ukraine, 2015b).

Moreover, as of June 1, 2019, the Law of Ukraine "On Amendments to the Tax Code of Ukraine and Certain Other Legislative Acts of Ukraine" entered into force. The Law of Ukraine "On Amendments to the Tax Code of Ukraine and Certain Other Legislative Acts of Ukraine for Improvement of Administration and Review of Rates of Certain Taxes and Levies" took legal effect on December 1, 2019, which contains the main provisions intended to contribute to the development of the renewed energy sector. The following contexts are worth mentioning:

– the Tax Code of Ukraine stipulates that up to March 31, 2022 operations with import to the customs territory of Ukraine of the following goods shall be exempt from taxation for value added tax: combined cycle power plants, photovoltaic panels, inverters and transformers of suitable capacities (Parliament of Ukraine, 2011a);

– the Law of Ukraine "On Energy Land and the Legal Regime of Special Zones of Energy Facilities" contains a provision according to which industry, transport, communications, energy, defense and other purposes can be developed on the land by alternative energy facilities that use renewable energy sources regardless of the purpose of such land plots (Parliament of Ukraine, 2011b). All these measures have caused a rapid growth of green energy, which led to the re-production of energy in general. In view of the fact that the State as a whole is not the only one, the State in the person of the state company, "Guaranteed Buyer", is forced to buy green energy in full volume at the fixed "green" tariff, which is one of the highest in Europe today (Drapak, 2018).

Most producers of solar energy receive, according to the law, 4.25 hryvnia (UAH) per kilowatt, when they produce hydrogen energy at 3-3.5 hryvnia (UAH). This is significantly more than the "thermal" (1.20 hryvnia per kW) and "nuclear" (0.67 hryvnia per kW). The consumers pay (without taking into account taxes and charges) only 0.25 hryvnia per kilowatt and industrial enterprises pay 1.25 hryvnias per kW. For a long time, it was possible to keep low tariffs for the population at the expense of the sale of nuclear energy to industrial enterprises. However, due to the rapid development of renewable energy this system ceased to work - the money for subsidies catastrophically lacks. The State enterprise, "Guaranteed Buyer", is a *de facto* bankrupt (Thaize, 2020) and, by the end of January 2021, the company had already collected over 25 billion hryvnias (UAH) from the "green" sector (Finbalance, 2021). Thus, we can conclude that the transition to green energy has been very rapid, which is affecting the State budget of Ukraine in the conditions of permanent economic instability. There is a situation when the rapid transition to alternative and renewable sources of energy is available only to economically developed countries. The functioning of large power plants from renewable energy sources is characterized by sharply changed modes of operation in the structure of the United Energy System of Ukraine. This leads to additional costs for the dispatching of power plants and maintenance of reserve capacities to regulate the operation of wind and solar power plants.

We should also pay attention to the absence of an important State policy of deregulation in the energy sphere, i.e. reduction of the State influence on the energy sector of Ukraine. Thus, the adoption of the Law of Ukraine "On the National Commission, which carries out state regulation in the fields of energy and public services" (2016) (Parliament of Ukraine, 2016) meant the continuation of the course on State management of the energy sector, which, in our opinion, does not correlate with European standards. The declared aim of adoption of the mentioned act is elimination of monopolies and State regulation of activities of the Ukrainian energy market participants. But, obviously, in the opinion of the lawmakers the State should manage the energy sector without any intermediaries. The law determines the legal status of the State regulator in the field of energy and communal services, which performs regulation, monitoring and control over the activities of State actors in the field of energy and communal services. Thus, the State, using an imperative influence, regulates the energy sector by creating the same conditions for all entities of the energy sphere and reducing the impact on price formation. In our opinion, the State should create transparent conditions and the same rules for all players in the energy market, thus reducing its own influence on the market of energy resources.

Recently, the Law "On Energy Efficiency" was adopted, which is an important step towards the implementation of the third energy package, namely the European Union Directive 2012/27/EC "On Energy Efficiency". The law stipulates that the emergence of national and local plans for energy efficiency. In addition, the monitoring of implementation of the National Plan will be introduced, and all who are willing will have access to the official results of this monitoring. Establishment of an energy

management system in cities and State authorities, i.e. special units and specialists to perform energy monitoring of buildings, detection and solution of energy efficiency problems, etc., purchase and lease at public expense of only energy efficient equipment and premises, require modernization of equipment and measures by energy supplying companies, and create an open online platform on energy efficiency. The law also establishes how much energy consumption is to be reduced in the short term.

The law stipulates a focus on medium- and long-term planning of energy efficiency measures. Thus, the Ministry of Development of Communities and Territories of Ukraine has to develop a long-term strategy for thermal modernization of buildings, which can positively affect not only the preservation of costs, which are lost for a long time together with the lost heat, but also to improve the condition of the natural environment.

However, this law potentially has a number of shortcomings. A number of provisions of the law are declarative in nature, it is necessary to adopt a large number (nearly 50) of secondary legislation and regulations concerning strategies, national action plans, municipal energy plans, and reports on the potential of energy efficiency of energy supplying companies over a one-year period, without which the law will remain a declaration of positive intentions. The responsibility for the issues of energy efficiency, in general, and energy efficiency between the Ministry of Energy and the Ministry for Communities and Territories Development of Ukraine are rather abstractly divided, which will not contribute to achieving the goal of improving energy efficiency. Moreover, implementation of provisions of the law requires obtaining funds, in particular, for creation of the energy management system, implementation of energy plans of cities, energy audits, etc.

5. CONCLUSIONS

Development of legal security of the energy sphere in the EU has been taking place steadily for 70 years and has passed quite a significant period, from ensuring economic goals of self-sufficiency in energy resources to ensuring energy and environmental security. Adoption of energy packages allowed to avoid monopolization of the energy sector, ensured competition among producers and suppliers of energy resources, ensured equal access to energy and gas supply networks, strengthened the role of the consumer of energy resources, liberalized the energy sector, diversified energy resources, increased the share of green energy, reduced carbon dioxide emissions into the atmosphere, and increased energy efficiency and energy security in general.

However, the implementation of EU energy directives in Ukraine is taking place in a fragmented manner, unsystematically, without clear economic estimates and the expected result disregarding their overall goal of ensuring energy security of Ukraine. Thus, adoption of the Law of Ukraine "On the Natural Gas Market" for implementation of Directive 2009/73/EC "On Compliance with the Internal Market of Natural Gas" and EU Regulation 715/2009 "On the Conditions of Access to the Natural Gas Transportation System" in fact did not contribute to de-monopolization in the gas sphere. After the adoption of the Law of Ukraine "On the Electricity Market" the regulatory irregularity of the implementation of parallel markets, generating capacities and the problem of accumulation of charges, detailed regulatory and technical infrastructure remained. The sharp transition to green energy and its extremely high price, under the conditions of permanent economic crisis, causes excessive pressure on the State budget of Ukraine. Under such conditions, the functioning of large power plants from renewed sources of energy is characterized by sharply changed modes of operation in the structure of the unified energy system of Ukraine. The recently adopted Law of Ukraine "On Energy Efficiency" stipulates the national and regional systems of energy management and energy efficiency important for the State's energy security. However, without adequate funding and training of a sufficient number of specialists in energy efficiency, it runs the risk of being solely declarative.

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Postmodern Transformations of Tourism Development

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ABSTRACT

This article examines contemporary scientific approaches to the issues of postmodern transformations of rural tourism development. The contradictions between the present postmodern society and the information-technological development of the rural areas in Ukraine are highlighted. Evidently, Ukraine does not fully use the new opportunities that emanate as a result of globalization of an economy. The main indicators of postmodern influences, such as informational and technological, political, social, socio-cultural, and personal (psychological), are earmarked featured. The characteristics of evolving social relations are also determined as premodern (archaic), modern and postmodern relations in the societies in particular context of tourism development. The factors influencing the postmodern tourism consumerism include the awareness of the social crisis, escape from reality, mundane avoidance, search for the self and self-realization, overcoming psychological trauma, the illusion of involvement in certain processes, positioning oneself with the upper class, new experience, and information society.

Keywords: Postmodern society; Rural tourism; Postmodern tourism; Postmodern transformations

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1. INTRODUCTION

The postmodern transformation of tourism development provokes scientific discussions as to whether postmodernism is our future, and, sometimes, it leads to radically opposite conclusions when assessing its impact. This deserves a special meaning in the study of the tourism development in the countries in transition from the standpoint of the global economy. Modern contradictions in postmodern society, economic and information-technological development of rural areas, and personal development of citizens can form the prerequisites for new areas of tourism. Due to the current social demands of reorientating tourism preferences from the mass segment to the individualized one, from the material infrastrcuture to the growth of the intangible components, the rural communities can get certain chance for developing themselves through streamlining the available opportunities. An important aspect can be postmodern personal transformation of consciousness of a tourist, development of his/her knowledge and cognitive intelligence, and exposing his/her to the technological innovations.

The postmodern influence on tourism is considered in the works of many scholars. The research of Zhang and Hui (2016) focuses on the existential problems in tourism. The authors conclude that modern tourism is a way to make up for losses caused by the rhythm of life, a way to escape from reality, by offering individuality and freedom (the spiritual home of utopia). They focus on the evolution of rationality and the links between tourism and reason (neo-rationalism), which includes both scientific and humanistic rationality. Pernecky's (2006) research focuses on the study of New Age tourists involving travelers in New Zealand, where it is empirically proven that these are individualists engaged in their search for extraordinary and transcendent consciousness, which aims at personal, spiritual, and emotional growth. An important place in the study of postmodern tourism transformations belongs to behavioral approaches, the results of which are described in a paper by Chinese scientists (Ying et al., 2021). The authors determined that virtual reality advertisements with greater telepresence generated stronger intentions to visit the destination, and this effect was mediated by cognition (educational component) and attachment (entertainment and aesthetics). The results of the study by Bogicevic et al. (2019) points out that virtual reality significantly excites the imagination of tourists and encourages them to "dream" about a tourist offer before they realize them at the hotel in real.

Studies by Marasco et al. (2018) determine the impact of virtual reality created with the latest generation devices required to visit places, attractions, or cultural heritage sites. In this context, the authors presented specific theoretical and practical implications. Kang (2020) emphasizes the predominance of the affective nature of desires and decision-making regarding tourism consumption. The scientific findings of Oktadiana and Pearce (2020) are related to the study about user difficulties in the context of tourism technologies. The researchers have identified many annoying and inconvenient aspects of tourism technology interfaces, as well as problems with Internet access, language difficulties, and planning faults. Wei et al. (2020) focus their research on the study of cultural worldview and cultural experience in nature-bound tourist attractions. Their conclusions relate to the practical implications embedded in social psychology. Christou et al. (2020) highlight narcissism as a modern tourist phenomenon, which is manifested in the self-presentation of the tourist, where he or she is in the foreground, followed by a tourist attraction. This, according to the authors, creates certain obstacles for tourism promotion at certain locations. Paying tribute to the scientific works of the authors, it is believed that the topic of rural tourism development in postmodern society requires some deeper research taking into account the current magnitude of social knowledge, information technology, and reorientation of consumer demand for tourism products. The purpose of this article is to identify areas of postmodern transformations of rural tourism development and determine its basic principles in the light of modern postmodern consumers.

2. DISCUSSIONS

The basis of the existing sociological discourse in postmodern tourism is the definition of its two vectors: simulation and search. The first direction is associated with hyperrealistic analysis, imitations, and simulations. The second direction is related to the search for the real, for the deep, for oneself or one's roots. The postmodern tourism defines the attractiveness of natural and rural areas as postmodernist expressions. The first direction is quite successfully implemented in the modern concept of tourism development and has every chance to widely reach a mass consumer. The development of the second direction is determined by the educational-intellectual and spiritual component requiring an appropriate

foundation and competencies. The phenomenon of postmodern influences in tourism can be considered from several aspects, as depicted in figure 1. Various aspects are explained as under:

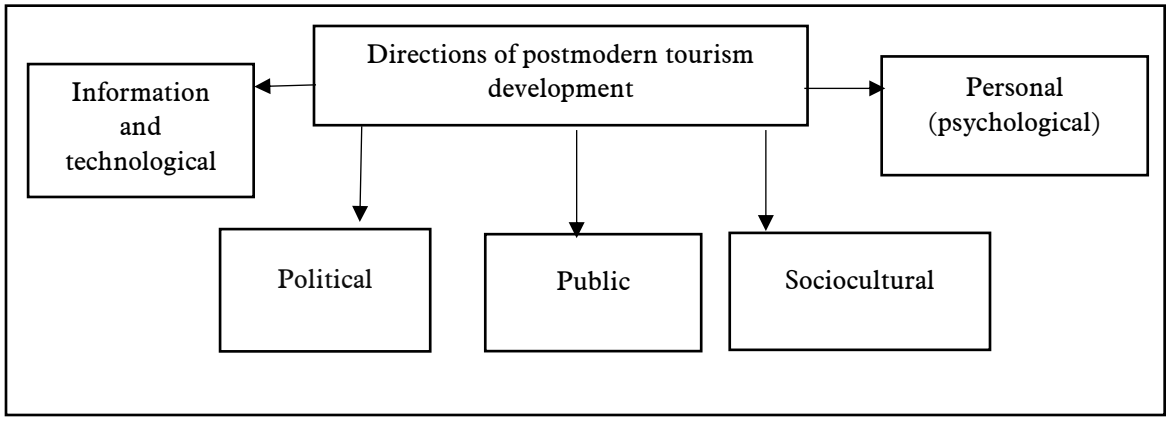

Figure1: The main aspects of postmodern influence

2.1 Information and technological aspect

Rapid technological development and significant social virtualization have led to the emergence of a new type of human consciousness, which is integrated into this process of postmodern tourism. This collective person has the appropriate technological competencies and accompanies his activities by expanding the network of virtual acquaintances, by creating groups for communication, and by carrying a consumer for information. However, modern scientific debates focus on whether such a virtual entity can be considered a personality. Identity issues are increasingly moving into the field of multidisciplinary research, which requires scientists to study themselves thoroughly. Nagy and Koles (2014) identify the virtual personality as a conglomeration of personal, social relations, and material aspects. Soldatova and Pogorelov (2018) in their scientific findings claim the virtual personality not to be unique. It consists of a set of signs, symbols, and virtual material, and is defined as a "repost identity". This identity is not independent in decision-making but has a strong dependence on the signs of support for a virtual dating network determining its status and have nothing to do with reality.

The availability of information technologies at a certain tourist destination is essential for the formation of a virtual personality and virtualization of tourist consumption. World statistics demonstrate that as of early 2021, 96% of the population in Northern Europe has access to the Internet, 93% population in Western Europe. Overall, the global average Internet penetration rate is about 60 percent. The largest number of Internet users in China is more than 854 million and in India about 560 million. However, these countries still have a significant part of the population not having Internet connectivity (Johnson, 2021). The high degree of penetration of Internet technologies contributes to significant virtualization of both the individual and social processes, leading to significant transformational changes in the tourism sector. The household access to the Internet does not reach the world average in rural areas of Ukraine (Table 1), which hinders the development of tourism in the context of attracting mass postmodern tourists. However, this can form the preconditions for those consumers who are in search of a meaning of life, looking for beautiful views, escaping from the urban globalized environment, and wanting a harmony with nature.

Table 1: Access level of Ukrainian households to the Internet, in %

2018	2019	2018	2019
62.6	70.1	47.8	55.9
Urban population		Rural population	

Source: State Statistics Service of Ukraine (2020)

2.2 Political aspect

Postmodernism is closely linked to globalization and the emergence of new forms of interaction between political representatives of different countries. In the political context, significantly open borders and existing movement of tourists lead to the nomadism phenomenon. This phenomenon is especially vividly manifested in the case of the migration crisis, which is a consequence of the unequal world development. Undoubtedly, postmodernism erases national borders, strengthens communication processes, and exposes the illusion of understanding between cultures, leading to the development of tourism and intercultural integration. However, the existing unresolved problems of a global scale form the foundation of a civilization crisis with a certain turning point in the modern history of mankind. Considering that world development is characterized by significant polarization between poor and rich countries, between Western and Eastern civilizations, it can be argued that a significant part of the world at this stage is under the influence of a traditional (premodern) society having distinct corresponding characteristics. Postmodernism has developed mainly in Europe, but Western traditions significantly influence the culture of the East. The significant interest of tourists from the West in the culture and touristic heritage of the Eastern countries, the growing magnitude of tourist travel to poor countries are significant examples. A wealthy tourist enjoys the contemplation of a different life, a different culture and customs, causing negative emotions in the local population, realizing their hopelessness and despair. Many of these countries in modern conditions demonstrate high rates of economic and demographic growth and differ from the Western vision of the world, which contradicts postmodern liberal ideals. In this case, society may come to a fierce confrontation, and possibly change the vectors of development discourse.

Peters et al. (2019) define postmodernism as a form of anti-fundamental thinking and as anti-philosophy. It is argued that today postmodernism does not provide security, forcing the society to think and live outside the paradigm of fundamentals. In this context, the postmodern paradigm is seen as a prospective intercultural global philosophy, although quite distant. For example, Yin (2018) criticizes the Eurocentric nature of postmodernism and argues that, to preserve their identity in the age of globalization, non-Western nations should go beyond postmodernism. Postmodernism is characterized by the emergence of new social movements: pacifist, feminist, environmental, and social. They have become possible through the spread of the knowledge industry, which the new information age defines as the most significant value. A special place is occupied by ecological movements and the formation of ecological consciousness of citizens, which causes a significant need for the development of ecological tourism in postmodern society, as well as the formation of a special system of ecological values directly related to rural development.

2.3 Public aspect

Postmodern philosophy determines the prospects for the development of society not only from the standpoint of consumption of symbols and images but also from the standpoint of imitation and simulation of cultural goods, which are defined as hyperreality. This is due to the formation of a society of spectacles, the end product of which is the image. The significant mobility of citizens is a specific feature of the postmodern organization of public relations. Conceptually, postmodernism is closely linked to the new economy, which is characterized by the use of high technology and information coupled with a global integration. Some research (Pecheniuk, 2020) defines the basis of the new economy in knowledge and intelligence under the influence of economic growth, priorities of creativity and art, increasing competition among global communication networks, and the dominance of service industry. For the completeness of the study of postmodern society, it is important to consider the characteristics of the evolution of social relations in the context of tourism development, which are illustrated in table 2.

The characteristics illustrated in table 2 are not final and non-arbitrary, because, at different historical stages of social development, there is an overlap of events, repetition at certain intervals, and a shift in the centre of attention, etc. However, the above information indicates the presence of similar features between archaic society (pre-modern) and postmodern society. Common features include the focus on the individual consumer's liberalization and the absence of strict guidelines (while subordinating to global mechanisms in postmodernism). The person's preferences and the choices of his place in tourist consumption have a relevance. Poverty is coupled with challenges of maintaining human integrity in the first place, and a decrease in social contacts and an increase in the fragmentation of life in the second place. The growing marginalization of the population also affects the tourism requiring not only a material component but is also determined by various factors such as quality of education.

Table 2: Types of social relations and their features in the context of tourism

Archaic society (pre-modern)	*Modernism*	*Postmodernism*
Individual tourist consumption (pilgrimage, summer accommodation in estates)	Transition to mass consumption of a tourist product	Transition to individual tours based on modern information technologies
The liberalism of tourist travel	Strengthening of state control over the subjects of tourist activity, manufacturability, and predictability of the tourist product	Freedom and mobility of tourist consumption, subordination to global mechanisms
Decentralization, lack of standards of tourist consumption	Standardization and concentration of tourist activity	Decentralization and individualization, but with pronounced global standardization
The integrity of human existence in society, but its miserable existence	Forming a society of consumption, imposing needs that make people their slaves, increasing alienation	Total alienation, reduction of social contacts, fragmentation of human existence, transition of tourist consumption to non-material, emotional level
The majority of the population is marginalized in tourism, they form a low social stratum, the "bottom" has no chance to escape from it.	Formation of a welfare society, the opportunity to take advantage of tourist offers to the lower classes due to the relatively cheap supply and mass tourist consumption	Significant socioeconomic polarization of members of society, democratization, the emergence of a mass marginal layer, precarization, total dependence on external living conditions

In this context, applying neoliberal approaches in the educational environment, which is the basis for further social development, is of considerable concern. The world community is also anxious about the low educational status. Arran (2021) sharply criticizes the modern educational and scientific environment. He argues that the corporatization of universities and the work of scholars on specific research for which funding is allocated, undermines the intellectual movement, fragmentation of research, and, in fact, the refusal to find optimal ways to develop social relations based on philosophical and moral principles of world development. According to the author, this has led to a significant vulnerability of scientists and marginalization of the university environment, which, along with reducing the overall education of citizens, poses a significant threat to the development of intellectual tourism. However, this is a global trend, not particular to a country.

It is believed that the poorest countries in the Global South are least affected by neoliberal postmodernist trends, and are least affected by "collapse" too because they are close to nature (Daniel, 2021). The works of Desmond (2017), Ngonghala et al. (2017), Fisher et al. (2013), Broad and Cavanagh (2015), Alix-Garcia et al. (2013), and Cobbinah et al. (2015) lead to the assumption that the way out for the current situation in the context of balancing postmodernism influences the tourism activities and recommend the application of the concept of the ecology. According to them, a potentially exploited society has its own ecology, and it presupposes the ecologization of the worldview. The above conclusion is confirmed by the studies of Zhang and Hui (2016), which analyze the integral relationship between mind, modernity, and tourism, with the possibility of eliminating negative aspects of postmodernism by promoting neo-rationalism. According to them, this will lead to the healthy development of society as a whole. In addition, the authors expect the academic environment to exacerbate the studies on neo-rationalism in the context of tourism theory and philosophy. This will contribute to the formation of a new tourist behavior meeting the unitarity of society, nature, and man, and the improvement of the tourism industry and public life. The concept of neo-rationalism combines Western traditional rationalism with traditional Chinese culture. It is based on the critique of the unlimited influx of pleasure and satisfaction of human physiological instincts. A new humanistic spirit is proposed, which includes

the mutual relations between human society, technology, and nature, care for the existence and fate of man forming the desire for the spiritual value of the nation and human existence.

2.4 Sociocultural aspect

Current trends in the creation and consumption of tourism products are characterized by a complex socio-cultural environment that takes into account the history, culture, and lifestyle of people. According to the recommendations of the European Parliament and the Council of Europe, the cultural component is included in the eight basic civic competencies necessary for active public life, personal realization, development, and social cohesion. Undoubtedly, the cultural competence of citizens has a significant impact on tourism. A high degree of its development, wide knowledge of local, state, European and world cultural heritage, understanding of their influence and place on a global scale, insight of cultural and linguistic aspects, skills in determining comprehension of social and economic opportunities in tourism activities lead to a decrease in the prerequisites for the formation and dissemination of tourist emptiness. It is associated not only with material aspects but also with several non-material factors, to include: low level of education, low level of social, economic, and cognitive activity, lack of motivation to travel, discontent for tourist consumption, and lack of a State policy for the development of culture (Pecheniuk, 2019). It should be noted that, in the Ukrainian context, these processes require an appropriate conceptualization and understanding of transformational conversions.

Pecheniuk (2019) identifies the main problems concerning cultural competence in the context of studying the conditions of Ukraine. This is manifested in the distortion of historical memory, disagreements in the vision of culture in the country, slow shifts in society, significant distrust, a propensity for hypothetical support to European values, selective implementation of values in everyday practice, and educational and informational competence of citizens. As Kostiuk (2016) points out, in general, the culture of the 21st century, as in antiquity, continues to be captivated by mythologies and the "sacredness" of society. The myths also take on other cultural forms. At the same time, the myth is not only dependent on the cultural context of that time but also acts as a means of social self-identification of individuals and society, indicating a social and psychological phenomenon in itself.

When determining modern tourist destinations, the growth of interest of the postmodern tourist in mysticism, which is associated with the spiritual and cultural sphere and satisfies information and psychological needs. Often, the interest in such travel among tourists is due to overcoming childhood fears, searching for something new, and interest in the past, spiritual and mental images, or mystical motives. The modern world has not completely ruled out mythological behavior, it has been pushed to more hidden levels of the psyche. The interaction of the collective unconscious and the individual, the strengthening of existing myths, and the formation of new ones lead to the creation of a secular religion, which is defined as a form of modeling the worldview and social behavior of participants in the context of the tourism process.

When analyzing the Ukrainian issue, it should be borne in mind that historically there have been two ways of forming national consciousness in Ukraine: Western, determined by civil liberties, and Eastern, the basis of which is adherence to traditions. In this context, a rather difficult task today is the transformation of the rural areas of Ukraine into well-known tourist centers, considering the lack of development of the infrastructure necessary for the tourism business and the insufficient preparedness of the population for accepting such activities. Ukraine in the historical context, compared to the Western world, entered much later into the enlightenment era and modernism. That is why a significant part of the rural population lives in an eclectic world, where there is a high degree of dependence on the agricultural sector along with the introduction of technological change. However, it should be noted that in places where the tourism industry interacts with cultural heritage and traditions, they begin to work for the tourist, changing the traditional way of life of the inhabitants and their life philosophy.

2.5 Personal (psychological) aspect

In the general cultural sense, according to Moshniaha (2014), postmodernism is a new cultural and historical situation, a new order, a type of self-awareness, a thinking, a worldview, and an assessment of human cognitive abilities determining tourist's place in the world. Characteristic features of the postmodern personality include reorientation from the material and spiritual beings to the sensory experience of cognition; focus on spiritual and moral unity, meaningful work and forming an environment of like-minded people; freedom of individual expression, a departure from traditions and religion; emphasis on social status and quality of life; readiness and openness to political, cultural and

social changes. Postmodern influences have formed a new personality - the post-tourist. This is a modern type of consumer who has considerable experience of tourist travel but is satisfied with imitation of reality, staging artifacts, and simulation, and is fully aware of the game that he or she enjoys and in which he or she is involved. The main generalizing incentives of consumption are emotions, experiences, and memories. This makes it possible to identify the factors shaping the postmodern tourist (Figure 2). These include awareness of the crisis of society, escape from reality, mundane avoidance, search for self and self-realization, overcoming psychological trauma, the illusion of involvement in certain processes, positioning oneself with the upper class, new experience, and information society.

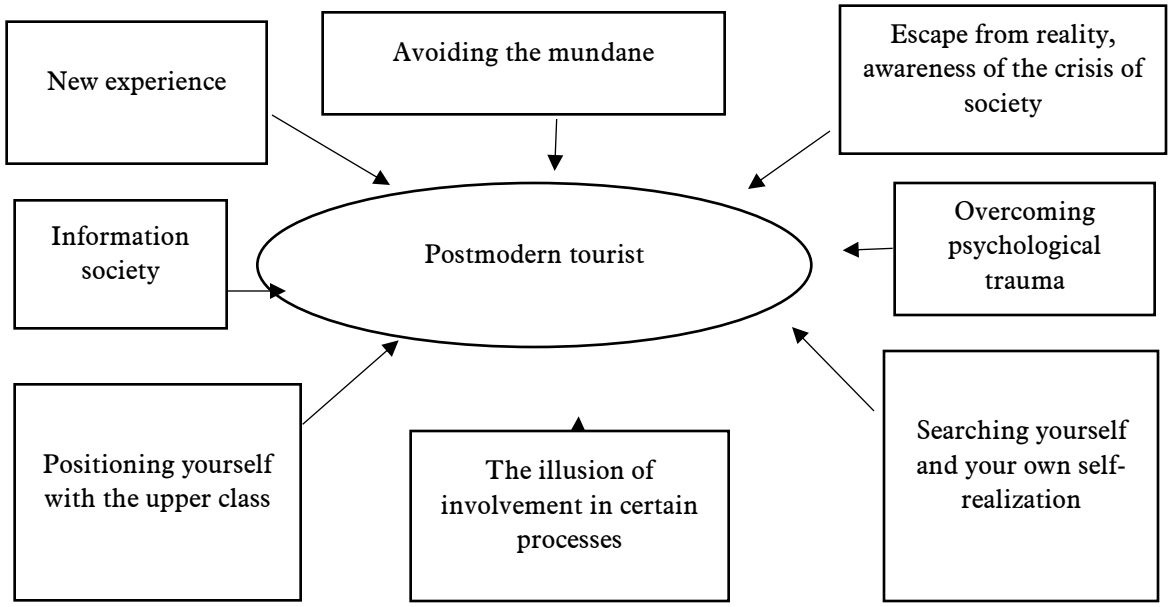

Figure 2: Factors of formation of postmodern tourist

Undoubtedly, the development of postmodernism is possible only in a globalized environment, in a consumer society, and wide information space. Postmodern transformations create certain opportunities for tourist destinations. Taking into account the tourism concept of the dream industry in the rural community development strategy can be defined as hyperreality with the appropriate content. These can be a variety of creative objects or events - simulators that are concentrated under a particular brand and are a tourist attraction where tourists become participants in a particular event, experiencing the appropriate emotions, feelings, and experiences. Examples of such objects include theme parks and museums, amusement parks, historical reconstructions of certain events, festivals, mystical tourism, etc. It is worth noting that COVID quarantine restrictions and the progress of online and on-site computer technologies have caused the development of virtual offers of tours and excursions.

The phenomenon of postmodernism has led to the fact that the tourist prefers an artificially created reality and it is much more attractive to him due to its cultural and semiotic filling with signs, meanings and images that promise a much higher emotional level of pleasure than when staying in ordinary conditions. In this sense, the main goal of a tourist trip will not be the physical visit of a tourist destination, but the satisfaction of one's own sensory components and emotional relaxation.

That is why, in postmodern society, it is important to bring out and advertise in the tourism market the very idea of travel, which will contain some properties: emotions and play, a sense of freedom and joy of life, gaining new experiences and impressions. However, some scientists, such as Volkov (2012), Upadhyay (2019) and Yin (2018), point to the negative consequences of postmodernism. These include destruction of national identity and culture, natural environment, depopulation of rural areas, formation of artificial reality to expect tourists, significant mythologizing of sacred places, hypertrophy of the effect of presence, perception of local cultural features as a way of earning, their conservation, absolutization, and hyperbolization, accompanied by a sense of play and falsehood, the illusion of understanding between cultures, the reduction of public space in rural communities, the orderliness of real life and the world, and the spread of the phenomenon of nomadism.

3. CONCLUSION

Postmodernist transformations significantly affect tourism development and tourism activities, which require a change in the general concept of tourism. A significant leap in the development of information technology has entailed considerable virtualization of tourist consumption and the postmodern consumer of a tourist product. This necessitates the transition of tourism to another level, which will cover the direction of virtual social life. At the same time, today the debatable issues are to determine the positive and negative benefits of postmodern tourism transformations, which can be considered both from the standpoint of mass postmodern tourism consumers and from the standpoint of personal development. Based on modern conditions of access to Internet technologies within rural areas of Ukraine, it can be stated that their level and quality do not correspond to the average European indicators, which is a significant deterrent to the spread of postmodern influences on the first (unreal, simulation) type of postmodern tourism. However, it can become a platform for those tourists who want to enjoy communication with wildlife, improve the emotional and sensory component, immerse themselves in the authentic environment of rural life, get to know themselves and the culture of the Ukrainian people.

Analysis of the evolution of types of social relations, starting with archaic society, modern and postmodern, in the context of tourism development and determining the place of man in tourism consumption, led to disappointing conclusions, as there are similarities between pre-modern and postmodern tourism, the main characteristic of which is a significant human problem and its place in society. In the first case, it is due to the impossibility to break out of the social bottom; in the second case, there is a significant social alienation, fragmentation of life, and precarization of the individual. The tourist marginalization of the population and the misery of human existence is the common problem.

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Conceived and designed the research or analysis	Yes	No
Collected the data	No	Yes
Contributed to data analysis & interpretation	Yes	Yes
Wrote the article/paper	Yes	Yes
Critical revision of the article/paper	No	Yes
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M – 00290 | Analytical Article

Redressing Policy Making in Pastoral Areas of the Mediterranean Region

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ABSTRACT

This article provides a critical analysis of the evolution of the policy, institutional and legislative frameworks impinging on the livelihoods of pastoral communities in the different flanks of the Mediterranean, and of the underpinning narratives, with a view to support a better informed and more consistent policy framework. The Common Agricultural Policy of the European Union is paramount in defining evolving and shrinking pastoralists' room for manoeuvre, not only in Europe but also in its neighbouring regions. In Middle East and North Africa (MENA) region, despite a quite un-harmonised and diversified ideological and institutional setting, agricultural policies in the different countries seem to converge to a very similar and consistent framework. Throughout the Mediterranean, the growing compliance with policy measures, institutional regulations and legislative rules have exposed agro-pastoral farms to increasing degrees of uncertainty and dependence on public subsidies, loan schemes and market prices, making their navigation decreasingly sustainable.

Keywords: Pastoralism; Rangelands; Mediterranean; Pastoral Policies; Common Agriculture Policy; EU

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1. INTRODUCTION

Extensive livestock systems all over the globe are facing new and increasing uncertainties. Globalisation of trade exchanges, demographic trends and environmental changes, including climate patterns, contribute significantly to reconfigure production and consumption patterns, and transform the agro-ecological as well as the institutional landscapes that underpin the socioeconomics of pastoralists. In the Mediterranean, policy developments and the evolving institutional framework show evident flaws in recognising and supporting the specificities of agro-pastoral resource management and its economic and ecological potentials - albeit with different patterns and dynamics.

At the crossroads between three different continents, the region ranks amongst the most exposed to climate change, characterised by environmental changes and shifting human pressure, spurred by demographic trends and migratory patterns. While in Europe the number of people engaged in the primary sector has decreased steadily in the last five decades, agriculture still proves to be the main source of employment and income for a large number of communities in the northern Africa and western Asia flanks. Across the Mediterranean today, a livelihood based on producing food and managing landscapes through extensive livestock farming is a decreasingly attractive option for the local youth. This raises major policy concerns, including those relating to sustainable food production, management of biodiversity and wider debates over the rural-urban and generational divides, particularly in the mountainous and dryland settings where pastoralism represents a major livelihood source.

2. A CRITICAL PERSPECTIVE OF THE POLICY FRAME IN THE MENA REGION

The Middle East and North Africa (MENA) region has vast areas of steppe and desert favourable to pastoralism due to prevalent arid and mountainous conditions. The climate is typically very hot and dry, characterised by low annual precipitation and high evaporation rates. Pastoral areas in this region are comprised of high-altitude mountains, the Mediterranean coast, and the Sahara Desert. MENA agro-pastoral systems exhibit accordingly a large range of diversity, from cattle herds in semi-arid areas, to sheep and goat flocks in arid ones and camels in nomadic ranges. In these regions livestock economies are strategic for ensuring national food security, and also for alleviating poverty for significant portions of the population. Livestock help reduce vulnerability to external shocks and increase smallholder resilience, including for rural women for whom the processing and marketing of livestock products might provide an important livelihood source (Ates and Louhaichi, 2012; FAO, 2021; IFAD, 2003).

Animal production and rangeland management are, therefore, high priority issues for national and regional politics. Livestock trade and marketing are important economic drivers, as the demand for animal protein consumption has grown steadily since the 1960s, spurred by a fast-growing, wealthier, and increasingly urban population, and is projected to double in the next decade (Ates and Louhaichi, 2012; Mohamed et al., 2019: World Bank et al., 2009). Understanding the political economy underlying livestock management, production and trade is, therefore, critical to understanding the broader policy framework in most MENA countries.

The regional political frame is characterised by significant tensions and disputes amongst most neighbouring countries holding relevant consequences on pastoral mobilities and trade networks, and often even on their integration into the local economy and society. Pastoralists represent important constituencies in the region, such as the Berbers or the Bedouins, but are often minorities in national politics. Some groups are primary actors in longstanding conflicts, such as the Sahrawi and Kurds fighting for political independence, Sinai Bedouins struggling against central State control or the Palestinian Bedouins resisting the military occupation. Pastoral communities display a strong attachment to their territory and an important reliance on customary social networks and governance systems. These domains have proven problematic for central States, as these provide flaws to their legitimacy in and control on peripheral areas, including border regions. Main policies have, therefore, focused on disarticulating and reducing the power of local customary institutional structures, while also seeking to incorporate pastoralists into national economies, with the dual intention of enhancing the availability of animal products for the burgeoning urban population and providing opportunities to sustain rural income and livelihoods. The recent conflicts that have recently ravaged the region have further affected livelihoods in these drylands (Nori, 2022 b,c).

3. ECONOMIC STRUCTURAL DEPRIVATION OF PASTORALISTS AS FOOD PRODUCERS

Such divided and conflictive policy framework has hindered regional economic integration, as well as the definition of a common policy frame for agricultural and rural development in the MENA. However, differences between national policies have been ironed out as development trajectories have converged over time, despite different ideological and institutional approaches. The main differences between the policy frameworks of MENA countries relate mainly to the legacy of the colonial experience, their positioning during the Cold War, and the importance of mineral revenues for each national economy, as this directly reflects on their respective purchasing power in world food markets, and the need to rely on international cooperation.

Following decolonisation in the 1960s, most MENA countries promoted domestic self-sufficiency through support for producers' prices and inputs, as well as with measures aimed at organising and controlling producers and value chain agents. This policy setting was dramatically reconfigured by the severe drought events that have struck the region as from the 1970s, highlighting both the vulnerability of local rural livelihoods and the fragility of national food security systems. Rural populations in most countries underwent dramatic losses and an intense reshaping of livelihood patterns, particularly in arid and semi-arid areas, including through an important resettling of herding households (Karrou et al., 2007). State support during those times aimed at ensuring populations' access to basic items, including production inputs for rural communities. Eventually such emergency measures have been converted into structural production strategies through systems of subsidies and loans, with relevant implications for the evolution of local farming systems (Nori, 2022b).

Since the late 1980s, agricultural policies in most countries have started converging under the auspices of the Structural Adjustment Program (SAP) regime, which importantly contributed to reshaping State engagement and the institutional setting throughout the rural world, and specifically in remote and inner rangelands. The new policy framework established by SAP paradigms hinged on market liberalisation, resource privatization, and diverse forms of rangeland encroachment. Through major cuts and reorientations of the State budget, SAP measures contributed to undermining the already inefficient public infrastructure and service provision in rural areas. Public expenditure from either State budget or international organisations was allocated to large, intensive farming systems while support to rural smallholders and drylands communities was curtailed, thus, to further weakening the social contract between the State and pastoral communities (Alary, 2006; Dukhan, 2017). The focus on increased production benefited large producers at the expense of rural smallholders who were negatively targeted by national policies and international support, especially those inhabiting drier and remote rangelands (Dutilly-Diane, 2006; Nori, 2019a).

Subsequent waves of economic restructuring in the 1990s included market deregulation and economic integration into global trade; agreements with the World Trade Organisation (WTO) and the EU increased most countries' reliance on food imports with a view to serving the needs of a growing and diversified urban population (INRA, 2015; Nori, 2019b). The restructuring of the agricultural sector further contributed to crowding off important portions of the rural population towards urban peripheries, thus adding pressure on the territorial setting and also triggering migrations to other regions (Gertel and Breuer, 2007; Nori, 2022b). The scaling down of State support schemes and finances left most producers exposed to market dynamics without adequate buffering nor negotiation skills, or power.

As the current Ukrainian crisis indicates, MENA countries today remain largely and increasingly deficient in food products and dependent on their imports. The livestock sector is no exception, and in order to meet a growing consumption demand from a limited and volatile production setting, State policies pursue, on the one hand, the intensification of livestock production and, on the other hand, an increasing reliance on import trade in food and agricultural inputs, including livestock feed. The high reliance and increasing dependence on market exchanges to satisfy countries' basic needs are the main elements of concern for national politics, as these address the pillars of national food security and, thus, of State legitimacy. In most countries, policies to sustain food self-sufficiency and protect domestic markets (i.e., livestock and cereals) are considered essential to ensure social stability; price support measures, food subsidies to consumers, quota systems and trade barriers are implemented accordingly (Alary and El Mourid, 2005; Dutilly-Diane, 2006; IFAD, 2003).

The intense incorporation into State-led schemes (subsidies, loans, and input supply) and market-driven mechanisms has importantly reconfigured the operational perimeter of pastoralists in most MENA countries and contributed to grossly reducing their economic and political autonomy. From an

exceptional measure to support herds in times of drought, animal feed supplementation has become the main animal production strategy. While the provision of external inputs was justified to decrease producers' exposure during years of scarcity, this strategy provided significant incentives to retain greater numbers of animals, reduce their mobility and integrate agro-pastoral economies into market dynamics (Darghouth and Gharbi, 2011). State-assisted commoditisation of livestock products had become a main production objective for most pastoralists, who are fundamentally conceived as mere livestock producers having to comply with satisfying the demand of an increasingly demanding population (Bourbouze, 2000; Daoud et al., 2016; Gertel and Breuer, 2007; Nori, 2022b).

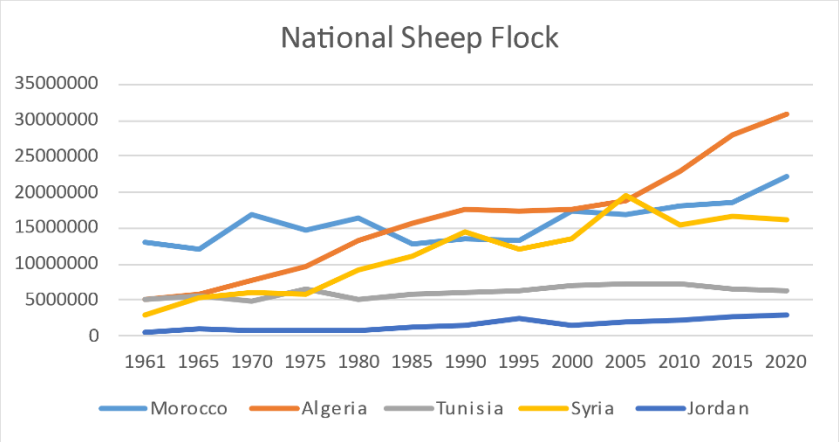


Figure 1: Sheep population trends in some MENA countries (2005-2020) [*Source:* FAOStat dataset]

While proving very costly for States' coffers, the decoupling of livestock feeding from rangelands' potentials and the growing reliance on external resources contributed as well to the overall detachment of the production and reproduction systems. While contributing, on the one hand, to a fragilisation of dryland ecosystems, on the other, it generated a dramatic dependence on State support and market-driven mechanisms, including on international trade and the global arena for the acquisition of production inputs. Altogether these dynamics held relevant consequences on local communities´ capacities to control and manage the core pillars of their livelihoods as well as on their socio-economic conditions. Increasingly high production costs and growing indebtedness, coupled with the volatility of subsidy schemes and market prices, have led to the degradation of socio-economic conditions in most dryland settings (Dhia, 1995).

Pastoral households had to reorganise accordingly to tackle these new and evolving uncertainties; shifting livelihood patterns were marked by a more sedentary living of local populations and a strong preference for more remunerating and less-labour intensive activities (Nefzaoui et al., 2012). In many peripheral rural communities, outmigration has become a mainstream strategy. While this initially addressed expanding urban poles, rural emigrations progressively targeted international routes and patterns (Zuccotti et al., 2018). The income generated and remitted by migrant members is now a relevant financial asset for most pastoral households, specifically to cope with crises (e.g., a drought event or an abrupt spike in the market), or either to take advantage of local opportunities (e.g., expanding the herd or acquiring land). The distant migration of the young rural labour force has significant implications for local development in terms of family configuration, farm structure and labour regimes, including in gender and generational terms (Elloumi et al., 2006; Nori, 2019a).

Overall, the policy framework characterising most MENA countries has aimed at stabilising and intensifying livestock production, thus, to reduce to mobility and flexibility than to underpin pastoral practices. Approaches supporting capital rather than labour-intensive farming systems have proven highly inconsistent in addressing the long-term needs of rural producers and ecosystems, particularly in the vast, rich but fragile dryland steppes and mountainous territories. The longstanding degradation of resource management and livelihood patterns in pastoral territories of MENA holds substantial risk potential in terms of natural hazards and social as well as political insecurity, especially under volatile climatic and economic conditions.

4. A CRITICAL PERSPECTIVE OF THE EU POLICY FRAME

Europe has a wide and diversified set of extensive grazing livestock systems, which utilize about one-fifth of agricultural land. Across Europe, the pastoralism shows a specific added-value and comparative advantage in mountainous areas and in islands, where the alternative costs for land and labour make it a convenient option compared to other forms of land use. Sheep and goats are reared predominantly in these settings due to their capacity to adapt to harsher soil and climate conditions; without pastoralism large portions of so-defined Less-Favoured Areas (LFAs) would be abandoned and become fallow, with significant ecological consequences. Cattle, pigs, and equines may also be reared in extensive ways, but their significance in pastoral terms is lower than that of small ruminants (EC, 2018; Nori, 2022a).

About 80% of the European sheep and goat flock is concentrated in Spain, Italy, Greece, and southern France which present a wide range of biophysical conditions that cover main types of pastoral systems in the Mediterranean EU region (EUMed) (EC, 2018; Nori and Farinella, 2019). The typical pattern includes grazing systems based on the use of permanent pastures, especially in upland and mountain areas, including through forms of sylvo-pastoralism. Mostly due to Common Agriculture Policy (CAP) incentives and animal health issues, the European sheep population has been growing steadily during the 1980s; it has then been constantly falling since the early 1990s, and this tendency has increased over recent decades, though with different pace in the diverse countries.

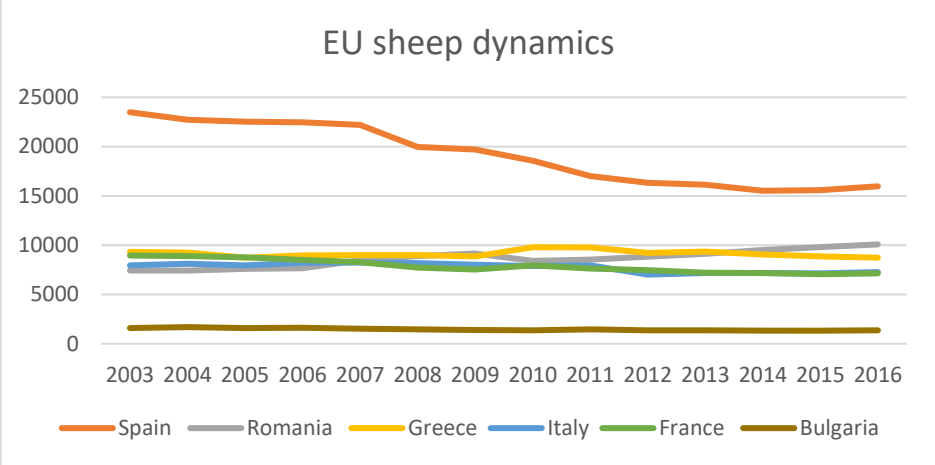


Figure 2: Sheep flock dynamics in main EU countries, 2003-2016 (000s) [*Source:* EC, 2020]

5. PASTORALISTS AS ENVIRONMENTAL MANAGERS

The policy framework in Europe, quite distinctively from those of other regions, recognizes the multiple values of pastoralism, and its contributions in terms of cultural heritage, environmental management and territorial cohesion. The EU has issued a set of principles and policies to protect pastoral practices in Europe; these are outlined in the CAP and implemented through the subsidiarity principle that characterizes EU governance. This implies that different institutional levels play diverse and complementary roles whereby the more immediate level (often the national or local one) is supposed to have better capacities to implement the principles dictated in the EU Directive (Caballero et al., 2009; Nori and Gemini, 2011).

As one of the founding policies of the EU, the CAP was established in the Treaty of Rome (1957)[1] to increase productivity, enhance farmers' income, stabilise markets, and ensure food supplies and reasonable prices for consumer. For the first two decades it mainly spurred agricultural production within a framework of agricultural modernisation and the development of the global agri-food chain, prompting serious concerns over market distortions and environmental implications. Subsequent CAP reforms have taken into increasingly account evolving societal concerns for a more sustainable and multifunctional

[1] https://www.europarl.europa.eu/about-parliament/en/in-the-past/the-parliament-and-the-treaties/treaty-of-rome

perspective of EU agriculture. To date CAP remains a strategic pillar of the EU and the main overarching policy regulating rural development that engages a substantial share of the overall EU finances (about 40 per cent of the total budget in 2018). For most European livestock breeders, CAP plays a significant role; its financial support may represent about a half or more of the farm revenue, with trends and variations changing from one country to another depending on local measures and implementation (Fréve, 2015; Nori, 2015; Ragkos and Nori, 2016). The majority of farms would not be viable today without this public support, given that production costs are constantly rising, while prices of sheep and goat products remain mostly stagnant (EC, 2018). The incorporation of European herders into CAP modalities is nevertheless an ambiguous and controversial process: while pastoralists claim autonomy and independence, they also recognise that most farms would cease to exist without institutional support ("*sans les primes, c'est la mort du métier!",* Fréve, 2015:7). The degree of dependency on CAP measures, mechanisms and funding is high and also implies that any change in the policy framework has a significant impact on the survival of the sector (Bertolozzi-Caredio et al., 2021; EC, 2018; Nori, 2019b).

Overall, the CAP mandate is to provide affordable food for EU citizens and a fair standard of living for farmers, to promote balanced territorial development and sustainable management of natural resources. Two key concepts informing CAP and helping operationalise its principles in pastoral settings are those of Less-Favoured Areas (LFAs) and High Nature Value (HNV). In such evolving context, pastoralists have been increasingly demanded to play their role in managing natural resources and maintaining landscapes in LFA and HNV habitats, including supporting socio-economic development and stabilizing population in marginal settings (Beaufoy and Ruiz-Mirazo, 2013; Nori, 2022a; Nori and Gemini, 2011; Nori and Farinella, 2019).

Accordingly, the European policy frame recognizes that, through grazing, ruminants provide a broad set of environmental benefits, including soil stability, water cycle regulation, biodiversity maintenance, carbon stocking and increased resilience to climate change dynamics (Caballero et al., 2009; Keenleyside et al., 2014). EU remuneration for socio-ecosystem services evolves from the acknowledgement that important societal threats originating in natural settings – such as landslides, forest fires, avalanches, erosional processes and flooding – are mostly due to the growing abandonment of marginal territories, for which the decline in extensive farming systems is a main driving force. This is particularly the case for the Mediterranean EU countryside, a sophisticated mosaic of intertwined human-nature relationships, increasingly challenged the evolving climate change scenarios (ESSEDRA, 2014; EC, 2020).

Initial CAP support led to excess food supply and related market distortions and environmental implications, which eventually induced CAP reforms to better account for different aspects of agriculture within a more sustainable and multifunctional perspective, including specific requirements for environmental protection, food safety, and animal health and welfare. Thereafter, CAP support has increasingly been conditional on compliance with requirements associated to a different set of standardised measures, defined through time as eligibility rules, greening requirements, agro-environmental measures, good agricultural and environmental conditions, and – most recently – voluntary eco-schemes.

A fair analysis of the EU policy frame for agriculture and rural development and its reforms should take into account the wider European policy context as well. This shall include changes in public attitudes and societal concerns, as well as international agreements and commitments. When it comes to pastoralism, two main influential policy domains that have impinged on their institutional setting are those relating to trade agreements and the related marketing of livestock inputs and products, and those concerning the environment and governing the natural resources used by pastoralists.

Since the 1990s, the EU has further accelerated the process of integration into global market dynamics through the engagements with the World Trade Organisation (WTO) and other international and bilateral policy trade frameworks. Together with monetary union, WTO and regional trade agreements have deeply facilitated the circulation of agricultural inputs and products. For pastoralists this has meant a further intensification in market competition, as, on top of the livestock products issued from European intensive systems which feed their animals of cheap imported inputs - they also have to compete with those originating from other world regions, specifically New Zealand, Australia, and South America, where production conditions and costs differ widely.

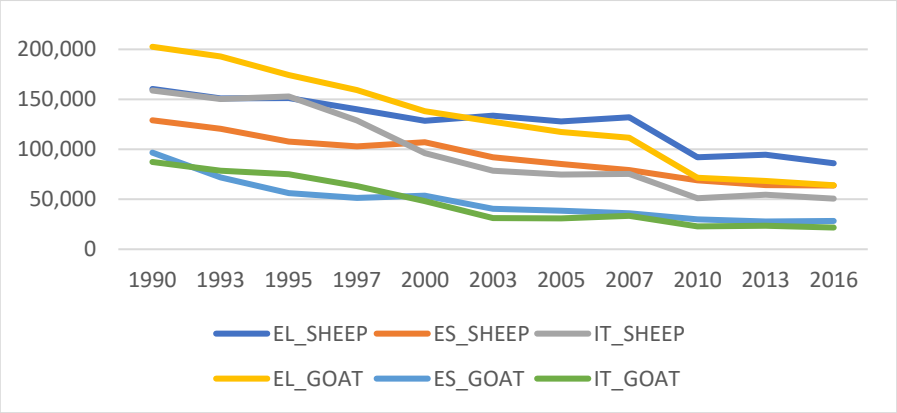
Marketing of pastoral products is, moreover, increasingly challenged by the shifting attitudes in European dietary patterns, with significant decrease in small ruminant's meat consumption on the one hand. Intra-community trade in live animals amongst EU countries exists as well, mostly depending on

pricing and quality aspects, as well as on shifting consumption patterns. Ireland and the United Kingdom are major exporters of sheep to France; and Romania exports to many south-western countries, and Italy and Spain move small ruminants in different directions. EU countries also export at an increasing rate to other neighbouring regions such as the Middle East and North Africa during specific seasonal festivities (EC, 2018).

Overall, the growing reliance on market mechanisms and the liberalisation of trade exchanges have generated profound uncertainties in production patterns. In spite of a stated concern for LFA and HNV, CAP ´rural welfare' is widely criticised for the inability to offset the negative trends affecting the agrarian world, particularly in its less-favoured settings where producers are increasingly dependent on subsidy schemes, and rural populations continue to decline, remaining socially and politically marginalised.

The CAP has played a substantial and ambivalent role in agricultural modernization through the restructuring of the global agri-food chain, which has furthered territorial polarisation (Nori, 2019b; Nori and Gemini, 2011; Nori and Scoones, 2018). The pillars of pastoral production systems - land, livestock and labour- have been deeply reconfigured by successive CAP reforms, with relevant implications for farm management, economic performance and livelihood levels. Pasturelands in Europe are currently subject to diverse patterns and tensions. Territorial polarisation implies the intensification of land use in certain areas and related over-grazing and degradational phenomena, while other pasturelands are increasingly abandoned, with under-grazing triggering shrub encroachment and land conversion into closed, woody areas amid expanding and forms of socio-economic desertification. Other pastoral areas are encroached by new economic interests and policy agendas and, thus, converted into natural reserves, tourist and leisure areas, intensive crop farming, forestry plantations, energy suppliers (i.e., dams, windmills, biofuel farming), where pastoral producers are seldom part of the equation (MAA, 2018).

The living and working conditions in mountainous, island, or inner territories are today tougher, the quality of basic services and facilities limited, and opportunities for employment and income fewer. In these settings, family farming has become a decreasingly viable enterprise, and an unattractive option for local youth, as attested by the demographic ageing of rural communities and problems and generational renewal and socio-economic desertification. Trends and figures are particularly dramatic in EU Mediterranean pastoral regions, which lose about 30 per cent of their pastoral farms every 10 years (EC, 2020; EuroStat, 2016; Nori, 2022a; Nori and Farinella, 2019).



Map legend: EL = Greece; ES = Spain, IT = Italy

Figure 3: Trends in small ruminant farms in Greece, Spain and Italy (1990-2016) [*Source:* Nori and Farinella, 2019 on EuroStat data]

The reconfiguration of pastoral farm management has also carried relevant implications for workforce patterns and labour regimes, with the challenges related to the decreasing availability of workforce. Difficult living and working conditions and poor economic returns make shepherding a poorly appreciated profession. While the average age of agricultural entrepreneurs is normally higher than any other economic sector, the figures for pastoral farms are higher than any other agricultural sub-sector. One-third of pastoral farmers are over 65 in Spain and over 60 in France, while in Ireland and the United Kingdom half of sheep farmers are over 55. In both old and the new EU Member States the

average age of farmers is rising, and the change of generations is a long way off (EP, 2008; Nori, 2017; Pastomed, 2007).

Due to the decreasing availability of a skilled and motivated workforce, in recent decades, most European farms have survived with the labour and services of foreign shepherds from neighbouring regions. The origin of the pastoral workforce has in fact changed from family members to salaried labourers, and lately from local to foreign workers, either from the EU eastern flanks (Romanian and Bulgarians have long fed the shepherding labour market in Italy, Greece and Spain), the Balkans (Albanians and North Macedonians especially in Greece and Italy), and Maghreb (especially from Morocco to Spain, France and Italy). Over time these flows are being replaced by migrant labour from southern African and eastern Asian regions (Nori, 2015). The growing presence of immigrants has come to offset the decline and ageing local rural population, providing European pastoral farms with a cheap and quite skilled labour force. While this phenomenon helps temporarily fill the vacuum, the immigrants' limited integration into the fabric of local communities threatens their scaling up as farm entrepreneurs, hence limiting options for a generational renewal (Nori, 2022a; Kasimis, 2010; Nori and Farinella, 2019).

Overall, despite policy efforts and financial investment, pastoralist today in Europe remains poorly remunerated in social and economic terms, and, as a consequence, it is decreasingly practiced by European citizens (Nori and Farinella, 2019; PACTORES, 2021; Pastomed, 2007). In an economic context organised around trade liberalization and free market, CAP efforts to compensate for those producers who operate in difficult conditions, or that incorporate social and environmental externalities in their farming systems thus bearing higher production costs, seemingly ineffective.

6. CONCLUSION: INVESTING IN THE MARGINS

Throughout the Mediterranean, much likely as in the rest of the world, agro-pastoral systems are being increasingly integrated into wider societal dynamics, and ecological uncertainties are progressively complemented by those generated in the market and policy domains. Despite the increasing societal demand for the products and the services provides by agro-pastoral systems, these remain poorly recognised and quite marginalised in policy decision-making, socio-economic developments and in the broader institutional setup.

In order to redress these dynamics, pastoralism should be appreciated as the most effective system to maintain a productive and sustainable human presence in the mountainous and arid areas of the Mediterranean region. This is particularly required in the Mediterranean region, in a context characterised by climate change, demographic asymmetries in demographic and resource allocation terms, and the related growing requirements for food sovereignty.

Consequently, policy measures, public investments and support systems should take better account of the specificities and potentials of extensive livestock production. These should translate in adequately appreciating and compensating farms and people who decide to invest their lives and professions in producing food in harsh areas and difficult conditions, while providing society with important public goods and positive environmental externalities that are not remunerated by market mechanisms.

Such a policy shift should capitalise on the evolving social demands for the products, services and public goods provided through pastoral resource management, and the associated externalities reflected in landscape and biodiversity, animal welfare, organic production and the contribution to other relevant economic dimensions, from food marketing to rural tourism and environmental protection. Environmental, labour- and trade-related policies should as well better sustain the social and ecological benefits of agro-pastoral practices. In the Mediterranean these would include a better governance of existing livestock value chains, mechanisms favouring strategies to adapt to climate change and measures to support the integration of a foreign workforce

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AUTHORS' DECLARATIONS AND ESSENTIAL ETHICAL COMPLIANCES

Author's Contributions (in accordance with ICMJE criteria for authorship)

This article is 100% contributed by the sole author. He conceived and designed the research or analysis, collected the data, contributed to data analysis & interpretation, wrote the article, performed critical revision of the article/paper, edited the article, and supervised and administered the field work.

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Research involving human bodies (Helsinki Declaration)

Has this research used human subjects for experimentation? No

Research involving animals (ARRIVE Checklist)

Has this research involved animal subjects for experimentation? No

Research involving Plants

No plant was used to conduct this research.

Research on Indigenous Peoples and/or Traditional Knowledge

Has this research involved Indigenous Peoples as participants or respondents? No

(Optional) PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses)

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Competing Interests/Conflict of Interest

Author has no competing financial, professional, or personal interests from other parties or in publishing this manuscript.

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