



FAO Sub-Regional Priority Framework for the Countries of the Cooperation Council for the Arab States of the Gulf and Yemen(SNGPF)

**Food and Agriculture Organization of the United Nations
FAO Sub-regional Office for the GCC States & Yemen
2012.**

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PREFACE

At the outset of the FAO reform, FAO gives more specific focus on its functions of knowledge exchange, policy assistance, capacity-building and advocacy. Within this focus, FAO embraces an approach that ensures full synergy with UN partners within the broader context of the multilateral system, especially at country level. The FAO reform referred to the UN's Millennium plus five Summit which explicitly recognized the interrelationship between hunger and poverty and the imperative of reducing both. It was emphasized that this message was, indeed, advocated by the earlier World Food Summit - WFS (1996), the WFS five years later (2002) and the WFS (2010) in their target of halving the world's undernourished by 2015.

To guide FAO's work in assisting member countries to achieve this goal, the vision and global goals of eliminating hunger, malnutrition and poverty have been given renewed impetus in the FAO Strategic Framework 2010-2019. The Framework calls for new direction of efforts towards efficient management of natural resources, enhanced food security and safety, rural development, and sustainable livelihood.

For the preparation of the Sub-regional Priority Framework for the FAO Sub-regional Office for the Countries of the Cooperation Council of the Arab States of the Gulf and Yemen (SNGPF), the FAO Sub-regional Office (SNG) carried out an elaborate participatory and inter-disciplinary process. In-depth discussions took place within RNE and SNG on comprehending the FAO's reform proposals; analyzing the Region's and Sub-regions' emerging trends, issues, needs, challenges, constraints and aspirations; and recalling the areas of comparative advantage of FAO in the RNE Region and SNG. The SNGPF takes into consideration the Sub-region's characteristics, needs, challenges and aspirations; and proposes sub-regional inter-disciplinary priority areas for sustainable management of natural resources, food security, agricultural and rural development.

The SNGPF was built on the outcome of a Consultative Meeting organized in Cairo, between 4 to 7 October 2010. During this consultation, over six sessions were devoted to discussing the specificities of the challenges and priority areas for the SNG. Representatives from member countries of SNG participated effectively in this consultative process. The identified priorities within the SNGPF were integrated in the Regional Strategic Framework (RSF) for the Near East Region that was discussed and endorsed during the 30th Session of the FAO Regional Conference for the Near East held in Khartoum, Sudan in December 2010. In addition, informal consultations with selected national, regional and international partners were conducted. Finally, a technical consultation was held on 27 October, 2011 in Abu Dhabi, UAE, and attended by representatives from SNG member countries and partners in development. The SNGPF was further discussed and technically endorsed during this meeting.

On the basis of these analyses, inter-disciplinary priority areas for the Sub-region were identified as: (1) Natural Resource Management, (2) Food and Nutrition, (3) Rural

Development and Role of Agriculture in Food and Nutrition Security and Poverty Reduction, (4) Climate Change, and (5) Preparedness for, and Response to Emergencies.

The document highlights the vision and mission of the SNGPF, and articulates the regional background, significance, components and impact indicators for each strategic priority area. These elements and parameters are specified in an operational and pragmatic manner to facilitate quantification, implementation, monitoring, evaluation and feed-back processes. The SNGPF is a “living document” that evolves over time.

The SNG Sub-regional Office stands ready to work in close collaboration with member countries, individually and/or collectively, the UN sister Agencies, and concerned international, regional and national partners in development including donors, civil society, non-government organizations and the private sector on the identified priority areas for interdisciplinary action. Member countries in the Sub-region would continuously select and update those priority areas most suitable for their unique countries situations and deemed essential to address their key challenges towards achieving sustainable food security. Concurrently, the FAO decentralized network (SNG with the support of the RNE) will mobilize its multidisciplinary expertise and attract the necessary resources, within and outside the Organization, to assist member countries to make a difference in improving food security and sustainability of agricultural and rural development in the Sub-region.

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SNG Coordinator

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MAP AND FLAGS

Members of the FAO Sub-regional Office for the Countries of the Cooperation Council of the Arab States of the Gulf and Yemen (SNG)



Kingdom of Bahrain



State of Kuwait



Sultanate of Oman



State of Qatar



Kingdom of Saudi Arabia



United Arab Emirates



Republic of Yemen



ABBREVIATIONS AND ACRONYMS

AOAD	Arab Organization for Agricultural Development
ACSAD	Arab Center for the Study of Arid Zones and Dry Areas
AFESD	Arab Fund for Economic and Social Development
API	Arab Planning Institute
BMI	Body Mass Index
CPF	FAO Country Programme Framework
CSO	Civil Society Organizations
DEI	Dietary Energy Indicator
FAO	Food and Agriculture Organization of the United Nations
FAOSTAT	FAO Statistics
GCC	Cooperation Council for the Arab States of the Gulf
GDP	Gross Domestic Product
ICARDA	International Center for Agricultural Research in the Dry Areas
ICBA	International Center for Biosaline Agriculture
IDB	Islamic Development Bank
IFAD	International Fund for Agricultural Development
IPA	FAO Immediate Plan of Action
KSA	Kingdom of Saudi Arabia
LAS	League of Arab States
MDGs	Millennium Development Goals
NERC	FAO Near East Regional Conference
NEFRC	FAO Near East Forestry and Range Commission
NGO	Non-Governmental Organizations
OIC	Organization of Islamic Conference
ORs	FAO Organizational Results
PAIAs	FAO's Priority Areas for Inter-disciplinary Actions
RECOFI	Regional Commission for Fisheries
RNE	FAO Regional Office for the Near East
RPF	Regional Priority Framework
SNE	FAO Sub-regional Office for North Africa
SNG	FAO Sub-regional Office for the Countries of the Cooperation Council for the Arab States of the Gulf (GCC) and Yemen
SNGPF	Sub-regional Priority Framework for the Countries of the Cooperation Council for the Arab States of the Gulf (GCC) and Yemen
SNO	FAO Sub-regional Office for Oriental Near East
SSR	Self Sufficiency Ratio
TCP	FAO Technical Cooperation Programme
TCSR	FAO Resource Mobilization and Operations Support Service
UNDAF	United Nations Development Assistance Framework
UNDG	United Nations Development Group
UNDP	United Nations Development Programme
UAE	United Arab Emirates
UTF	FAO Unilateral Trust Fund
WB	World Bank
WFS	World Food Summit (1996)
WFS:5yl	World Food Summit – Five Years Later (2002)
WTO	World Trade Organization

EXECUTIVE SUMMARY

The FAO Sub-regional Office for the Countries of the Cooperation Council of the Arab States of the Gulf and Yemen (SNG) covers Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirate and Yemen. The SNG is a very arid Sub-region, and water is the scarcest factor of production. Despite the several challenges facing the agriculture, natural resources and rural development in the Sub-region, the SNG countries attach high priority to the development and modernization of their food, agricultural, livestock and fisheries sectors. Agriculture including crop and animal production and fishing represents a way of living to a sizable portion of the population in several parts of these countries and contributes significantly to the economic diversification, rural settlement, poverty reduction and social stability in the Sub-region.

While the SNG countries have no foreign exchange limitation to fund the Sub-region's food imports (with the exception of Yemen), they face immense challenges to achieve the goals of its member countries managing and using its natural resources in an environmentally sustainable manner while addressing the pressing issues of food security, reducing poverty, combating desertification and enhancing rural development. In general, the Sub-region faces the following overall common challenges of: (1) Sustainable management of limited and environmentally-sensitive natural resources including saving water and protecting soils, natural vegetation and biodiversity, preserving the fisheries potential, and rehabilitation including trans-boundary diseases; (2) Sustainable availability of safe and nutritional food including the challenges of increasing food supply only based on comparative advantage and water availability, enhancing food quality and safety, managing the quantity and prices risks, diversifying the offer of food and harnessing the SNG comparative advantages; (3) Agriculture as engine for economic diversification, rural settlement, poverty reduction and social stability; and (4) Climate changes.

The SNGPF aims at translating the FAO global strategies and the Regional Strategic Priorities Framework into sub-regional priority areas and actions for achieving the Summits' objective of halving the undernourished by 2015 in the SNG. The SNGPF takes into consideration the Sub-region's characteristics, needs, challenges and aspirations; and proposes sub-regional inter-disciplinary priority areas for sustainable food security, agricultural and rural development. Thus, the SNGPF intends to: (1) Streamlining the functions of the Sub-regional Office for the Gulf States and Yemen in line with the regional and corporate FAO Reform and Vision; (2) Adapting FAO's global strategies into a regional and sub-regional setting; (3) Assisting member countries in highlighting strategic priority areas in line with MDGs; and (4) Highlighting areas where the Sub-regional Office for the Gulf States and Yemen (SNG) has comparative advantage for inter-disciplinary work.

The analysis of the Strengths, Weaknesses, Opportunities, and Threats (SWOT) were adopted during the preparation of the SNGPF. In identifying the sub-regional priorities, the joint strengths and opportunities are benefited from and stressed for implementation, while the identified priority actions aim at diverting the recognized weaknesses and threats facing the Sub-region.

Consistent with the FAO global vision and the vision of the FAO Regional Office for the Near East, the vision of the Gulf Sub-regional Priority Framework (SNGPF) is to ensure sustainable natural resource management while achieving a food-secure sub-region. The FAO mission in the Sub-region is to enhance food security, as defined above, by assisting Members to, protect and enhance natural resources with special reference to water resources; develop policy and regulatory frameworks in food, nutrition, agriculture, fisheries and natural vegetation cover; and promote knowledge generations, institutional capacity development and Sub-regional cooperation in related fields to sustainable food and agricultural development. .

The following five Strategic Priority Areas have been identified jointly by the SNG Sub-region as targets on which FAO assistance need to be focused in 2011-2019. Each sub-regional priority area is presented in this SNGPF by providing a rationale, a summary of issues and challenges to be addressed and the key priority actions identified for the sub-region. The objectives of the identified priorities are in conformity with those identified in the RPF for the Near East. The major identified priority areas are:

- | | | |
|----------|----|--|
| Priority | A: | Natural Resource Management |
| Priority | B: | Food and Nutrition |
| Priority | C: | Rural Development and Role of Agriculture and Fishery in Food and Nutrition Security and Poverty Reduction |
| Priority | D: | Climate Change |
| Priority | E: | Preparedness for, and Response to Emergencies |

The SNGPF provides an overview of the implementation arrangements within the technical capacities of the FAO newly established SNG, technical support envisaged from the FAO Regional Office for the Near East in Cairo (RNE) and the FAO Headquarters in Rome. The implementation arrangements for the SNGPF will stem from the new results-based management approach in the Organization

Within the above identified sub-regional priorities, the Sub-regional Office for the Countries of the Cooperation Council for the Arab States of the Gulf and Yemen (SNG) with the support of the FAO networks in the Near East Region and Headquarters will contribute to Organizational Results (ORs) and Strategic Objectives articulated in the FAO Strategic Framework, following the results-based approach. The FAO Core Functions that will be primarily used include: (a) monitoring and assessment of long-term and medium-term trends and perspectives; (b) assembly and provision of information, knowledge and statistics; (c) development of international instruments, norms and standards; (d) policy and strategy options and advice; (e) technical support to promote technology transfer and build capacity; (f) advocacy and communication; (g) interdisciplinary and innovation; and (h) partnerships and alliances.

The field programme development and implementation in the Sub-region incorporates a substantive portfolio of projects spanning a wide spectrum including agriculture, fisheries, forestry, nutrition and food safety, food security and others. These projects were developed prior to the establishment of SNG and the experience gained and lessons

learned in the formulation and implementation of these projects and related operational support represents a valuable service to member countries in the Sub-region. As most of the member countries of the Sub-region are high or middle high income countries, except Yemen, the regional and country Technical Cooperation Programme (TCP) will be made coherent with the SNGPF to act as a spearhead for field programme development at the sub-regional and national levels and initiate actions toward the formulation of Unilateral Trust Fund (UTF) programmes/projects. In the case of Yemen, the TCP will continue to be based on the country needs/requests as reflected in the Country Programme Frameworks (CPF).

The resources needed for the implementation of the SNGPF will be funded mainly through extra-budgetary resources. The core of the work will be undertaken with regular resources and existing extra-budgetary support, while the sub-region will vigorously pursue additional extra-budgetary funds for the priority areas through a resource mobilization strategy. The Sub-regional Office will assess the funding gap and reach out to donors in and outside the Sub-region to promote cooperative programmes to address sub-regional needs and priorities in areas of mutual benefit. Resource mobilization for extra-budgetary resources will be carried out in close collaboration with the FAO Technical Cooperation Department to align the strategy of resource mobilization at the regional level with the institutional strategy of FAO. Close collaboration with the FAO Resource Mobilization and Operations Support Service (TCSR) and RNE will ensure a streamlined approach and process for resource mobilization effort.

In the framework of the FAO Partnership Strategy, and the RNE Priority Framework (RPF), SNGPF will be used as a platform for building partnerships with key players in the Sub-region, including Regional and Sub-regional Organizations, Regional and Sub-regional Financing Institutes, UN Agencies and Networks, Technical Organizations, Civil Society (CSO), Non-Governmental Organizations (NGO) and Private Sector. SNG plans to intensify partnership with all partners in development. To this aim, the SNGPF will be presented to the Regional and Sub-regional Organizations, the UN agencies and the donors active in the Sub-region.

As a flexible and responsive tool, the SNGPF will be revised every two years, to include new development arising from country programmes, from the changes in the overall FAO strategic priorities or at the request of member countries in the Sub-region.

The FAO Sub-Regional Office (SNG) will assume a leadership role in coordinating the implementation of the SNGPF and its monitoring. To this end, SNG will work closely with the FAO Regional Office and potential country offices in the Sub-Region as well as the FAO technical divisions in Rome and, as appropriate, with partners from governments, civil society and private sector in the sub-region, UN system and the donor community/partners in development.

1. Rationale and Objectives of the Sub-regional Priorities Framework (SNGPF)

The FAO Sub-regional Office for the Countries of the Cooperation Council for the Arab States of the Gulf and Yemen (SNG) has been inaugurated in 23 November 2010. The SNG covers Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirate and Yemen. The SNG has initiated a participatory process for formulating a Sub-regional Priority Framework for the countries of the Cooperation Council for the Arab States of the Gulf and Yemen (SNGPF) till 2019. The main purpose of the SNGPF is to reflect countries needs and to translate FAO Strategic Framework and the Regional Priorities (RPF) for the Near East, as guidelines, into sub-regional priority areas and actions for achieving the members' Goals and Strategic Objectives in the sub-region and to capture the priority needs of these countries that can be met with FAO assistance. The approach used in preparing the SNGPF is highly participatory focusing on clearly targeted issues prioritized at sub-regional level, proposing actions anchored to the FAO Corporate and Regional Strategic Framework, and with specific results that could be monitored. The SNGPF will support the establishment of a strong platform of partnership to address common problems and achieve mutually beneficial results for the member countries in the sub-region.

For the preparation of the SNGPF, SNG carried out an elaborate participatory and inter-disciplinary process. In-depth discussions took place within RNE, OSD and SNG on comprehending the Director-General's reform proposals; analyzing the Region's and Sub-regions' emerging trends, issues, challenges, constraints and aspirations; reviewing the main FAO's Priority Areas for Inter-disciplinary Action (PAIAs); and recalling the areas of comparative advantage of FAO in the RNE Region and SNG. The SNGPF takes into consideration the Sub-region's characteristics, needs, challenges and aspirations; and proposes sub-regional inter-disciplinary priority areas for sustainable management of natural resources, food security, agricultural and rural development.

The SNGPF benefited from the Regional Strategic Framework (RSF) for the Near East Region that was prepared in 2010 and discussed in the Thirteenth Session of the FAO Regional Conference for the Near East held in Khartoum, Sudan in December 2010. Informal consultations with selected national, regional and international partners were also conducted. In addition, the SNGPF was built on the outcome of a Consultative Meeting organized in Cairo, between 4 to 7 October 2010. During this consultation, over six sessions were devoted to discussing the specificities of the challenges and priority areas for the Sub-regional Group for the Gulf States and Yemen. Representatives from the member countries of SNG participated effectively in this consultative process.

The following RNE Regional Priorities were approved by the NE Regional Conference December 2010:

Priority	A:	Food and Nutrition
Priority	B:	Role of Agriculture in Poverty Reduction and Food and Nutrition Security
Priority	C:	Natural Resource Management
Priority	D:	Climate Change
Priority	E:	Preparedness for, and Response to Emergencies

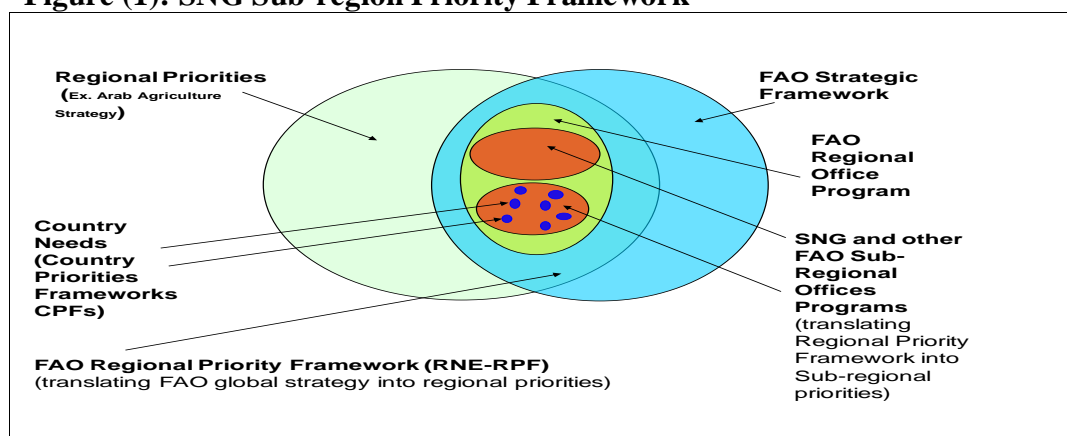
The SNGPF aims at translating the FAO global strategies and these Regional Strategic Priorities into sub-regional priority areas and actions for achieving the Summits' objective of halving the undernourished by 2015 in the FAO Sub-regional Group for the countries of the Cooperation Council of the Arab States of the Gulf (GCC) and Yemen (SNG). The SNGPF takes into consideration the Sub-region's characters, needs, challenges and aspirations; and proposes sub-regional inter-disciplinary priority areas for sustainable natural resources management, food security, agricultural and rural development. The SNG Office will assume a leadership role in coordinating the implementation of the SNGPF and its monitoring. To this end, SNG will work closely with the FAO Regional Office for the Near East and country offices in the Sub-region as well as the FAO technical divisions in Rome and, as appropriate, with partners from governments, civil society and private sector in the region, UN system and the donor community.

Thus, the SNGPF intends to:

1. Streamlining the functions of the Sub-regional Office for the countries of Cooperation Council for the Arab States of the Gulf (GCC) and Yemen (SNG) in line with the regional and corporate FAO Reform and Vision.
2. Adapting FAO's global strategies into a regional and sub-regional setting.
3. Assisting member countries in highlighting strategic priority areas in line with MDGs.
4. Highlighting areas where the Sub-regional Office for the countries of the Cooperation Council for the Arab States of the Gulf (GCC) and Yemen (SNG) has comparative advantage for inter-disciplinary work.

Figure (1) depicts the interrelationships among the FAO global strategy, the regional strategies, the FAO regional priorities framework for the Near East region, and the priorities framework for the Sub-regional Office for the GCC States and Yemen (SNG).

Figure (1): SNG Sub-region Priority Framework



Source :Modified from RNE-RPF presentation in the 30th Session of NERC, Khartoum, Sudan, December 2010.

II. Overview of Economic, Social and Environmental Setting in the SNG Sub-Region

2.1 Macroeconomic Settings

The SNG is an economically homogeneous region that includes countries with a common heritage, common levels of per capita income (except Yemen), and a common set of challenges. Historically, dependence on fossil fuel wealth in the member countries of the Cooperation Council for the Arab States of the Gulf (GCC) has played major roles in shaping the sub-region's development strategies.

The Sub-region benefited immensely from the wealth created by the sharp increase in oil prices in the 1970s. The development in the SNG countries has manifested into wider development in the Near East Region through a sharp rise in worker remittances, trade, and capital flows. Gross capital formation, although volatile, was maintained at exceptionally high rates, supporting a strong increase in growth rates of GDP and a vast improvement in living standards in the countries of the sub-region and also in many countries of the Near East and Asia.

The GCC countries have almost one quarter of the world's natural gas proven reserves. Qatar is one of the world's top producers of natural gas. Qatar is ranked third on the world and possess 14.9 % of the world's reserves. Saudi Arabia is the highest producer of natural gas among GCC countries and is ranked fourth in terms of natural gas reserves with 3.9%. Kuwait produces a relatively modest volume of natural gas. Kuwait is ranked twentieth in world natural gas reserves, with an estimated reserve of 0.9 % of the world's total reserves. The UAE is ranked fifth with 3.5% of world's total reserves while Oman has made natural gas the chief focus of its diversification and economic growth Strategy.

Recent higher oil prices and production allowed Gulf hydrocarbon exporters to boost public spending by nearly 10 per cent in 2010-2011 in contrast with a global trend to trim expenditure¹. The increase in spending and in the hydrocarbon sector resulted in lifting real GDP in the GCC by around 5.5 per cent in 2010-2011 compared with nearly 5.2 per cent in early 2010². Collective nominal GDP of the GCC states up by almost \$133 billion in 2010 and is expected to rise in 2011. The GCC's nominal GDP is expected to hit \$1,010 billion in 2011³.

Consumer prices and inflation has risen due to the rising international food prices. Inflation accelerates modestly - to an average of 4.3 per cent in 2011 from three per cent in 2010. At these rates, inflation should not present too much of a policy headache for the monetary authorities, though high food prices have scope to generate political

¹ <http://news.gulfjobsmarket.com/nominal-gdp-in-the-gcc-to-increase-by-133-billion-this-year-7862010-news>.

² Kuwait National Bank, 2010

³ Institute of International Finance -IIF, Quarterly Report, 2010, Washington, D. C., USA.

tensions⁴. In view of rising oil and food prices, social inequality and income disparities are on the rise.

Soaring GDP growth in GCC countries will raise the average per capita income in the Sub-region (GCC countries) by over 80%, from less than \$20,000 to more than \$35,000 in 2011's prices⁵. Income levels show wide variations within the sub region⁶. Per capita GDP in 2008 ranged from an estimated high of US\$39,000 for Qatar and \$26,000 for United Arab Emirates to less than US\$600 in Yemen with total average of US\$ 17,000 for the sub region as a whole. The oil-rich countries of the GCC, with average per capita income of US\$ 21000, have the highest per capita GDP in the Sub region (Annex 1).

Non-oil GDP growth—the relevant measure of economic activity for employment creation—is estimated to have been about 3.0 percent in 2009, and the rebound in growth in 2010 is expected to be stronger than in advanced economies. Headline inflation is estimated to have fallen from double-digit levels in 2008 to about 3 percent in 2009. The external and fiscal surpluses weakened in 2009, but are expected to recover partially in 2010, in line with the expected increase in oil prices as global recovery begins to take hold.

As for trade performance, the Sub-region's share in the world export market fell by more than half in the 20-year period between 1980 and 2000. Developing countries' share of the world market rose slightly during the same period. Nevertheless, in 2008, the value of total exports of the Sub-region was about Billion US\$ 175.6 with 17% increase over 1992-2001 average. Within the GCC, Saudi Arabia's share constitutes about 41% followed by United Arab Emirate's share of 31% (Annex 2).

The value of imports for the entire Sub-region represents more than 55% of the export value of the Near East region; out of which agricultural imports represents less than 9%. The percentage increase in the value of imports between 1992 and 2002 is slightly less than the percentage increase in exports for the same period. In absolute values, on average the total imports of the Sub-region increased from around US\$ 97 billion for the period 1992-2001 to more than US\$ 388 billion in 2008.

In 2008, the Sub-region's included about 16.8% of the RNE's population. Population in Saudi Arabia represent about 42% of the total population in the sub-region, while the population in Yemen, UAE and Kuwait represent about 38%, 7.4% and 4.8%, respectively, (Annex 1). These four countries alone constitute 91% of the Sub-region's total Population, while Oman, Qatar and Bahrain represent about 4.6%, 2.3% and 1.3%, respectively. The Sub-region has always been characterized by persistently high

⁴<http://www.emirates247.com/business/economy-finance/gcc-spending-to-rise-10-in-2011-2011-03-21-1.370897>

⁵McKinsey & Company Middle East: <http://www.ameinfo.com/146056.html>

⁶A Commentary by Masood Ahmed, Director, Middle East and Central Asia Department, International Monetary Fund Published in *International Economic Bulletin*, Carnegie Endowment for International Peace, March 2010.

population growth rates, which in the 1980s averaged 3.1%. Although this rate increased to 3.5% in the 2008, the labor force is still growing at more than 3% per annum as a result of previous population growth. The population of the SNG countries has increased from 35.386 million in 1990 to 61.930 million in 2009. During the period 2000-2030, the projected population of the Sub-region is expected to almost double from its present level.

In 2011, Bahrain and Yemen faced severe political instabilities. This situation could have far-reaching ramifications on economic development and food security in the Sub-region. These developments may warrant more technical assistance in the design of appropriate policies and supportive enabling environment to facilitate implementation and monitoring of national poverty reduction and household food security programmes. The move from emergency to rehabilitation and to development needs special attention especially in Yemen.

2.2 Major Agriculture and Farming Characteristics in the Sub-region

The SNG is a vast zone of different agro-ecological conditions, characterized by very low and highly variable annual rainfall and a high degree of aridity. Productive land is also extremely vulnerable to drought if mismanaged, leading to irreversible damage, such as desertification.

On average, the agricultural sector's contribution to the national economies of the countries of the SNG is low (about 3% of the total GDP in 2008), despite the fact that about 19% of the economically active population is engaged in agriculture. This reflects the sector's low productivity and the poor integration of rural people in the rest of the economy. However, there are large variations across countries depending on the relative importance of non-agricultural income in the economy. While it was 12.4% in SNE, 11% in SNO, and 8.8% in RNE, the percentage contribution of agriculture to the total GDP was less than 3% in the SNG countries. For individual countries, the percentage contribution of agriculture to total GDP in 2008 varies between less than 1 percent in Bahrain, Kuwait, and Qatar to about 2.0%, 2.8% and 3.9% in Oman, UAE and Saudi Arabia, respectively to more than 11% in Yemen.

The agricultural population of the Sub-region has slightly increased, during the 1990-2008 period, from 11.043 million to 11.614 million. About 30 % of the Sub-region's labour force is foreign labour. The percentage of agriculture population from total population varies among the countries of the Sub-region. While it reaches 0.8%, 1% and 1.1% for Qatar, Bahrain, and Kuwait, respectively, it reaches 3.2% for UAE and 5.5% for Saudi Arabia in 2008. The percentage of agricultural population is much higher in Oman and Yemen, reaching 29.2% and 39.8%, respectively, (Annex 1).

Total land area for the NSG represents over 25% of the RNE's total area. In 2008, agricultural land including pasture, range and forests in the Sub-region was estimated at around 200 million hectares or 64% of the total area. The bulk of this area is not suitable for agriculture and is used for grazing and animal production. The cropped area in the SNG has increased from 5.262 million hectares in 1990 to 5.676 million hectares in 2008,

representing only about 3% of the arable land. This means that a large area of the arable land is still untapped. The arable land is concentrated in Saudi Arabia and Yemen, where 93% of the total arable land of the sub region exists. Between the late 1950s and up to the 1980s, most countries invested heavily in irrigation development, especially large-scale infrastructure such as dams, water conveyance and distribution schemes, and irrigation networks.

Agriculture accounts for 86% of the available water resources. About 98% of the renewable water resources in the SNG sub-region is from internal sources. The total water use in SNG countries is about 5 times the available total renewable water resources. While the water use in agriculture represents about 5 times the renewable water resources for the SNG, it reaches only 39% in the countries of North Africa (SNE) and 73% for the countries of the Oriental Near East (SNO), (Annex 8). The SNG sub-regional irrigation systems are under considerable environmental strain. A related cause for concern is the overexploitation of groundwater in all countries of the Sub-region. Given that water is practically cost-free in most countries, the sustainability of irrigation systems is a major concern. Ground water is of primary importance in all countries, including fossil non-renewable water in all countries of the Sub-region. Ground water is becoming very deep in several parts of the Sub-region with irregular supply and a very high cost of extraction. Some projects for sea water desalination have recently been implemented. However, the excessive cost of the process renders such projects, for supplying irrigation water, economically not viable. Another environmental challenge being faced by the Sub-region is the relatively frequent strong sand storms leading to sand dune expansion. Sand storms do not only cause substantial harm to crop and animal production, but it also hinders fishing and damages the fragile natural resource base.

Several countries of the Sub-region aim at utilizing low-cost methods and technologies adapted to local conditions. Examples include water harvesting, use of cheap low-lift pumps and exploitation of shallow aquifers requiring simple methods of water extraction. Also, new approaches to irrigation in all the countries of the Sub-region emphasize the development of skills and of incentives to the adoption of water-saving irrigation equipment and practices, and encouragement to participatory management of water resources.

The countries of the Sub-region have similar farming systems with the exception of Yemen and some areas of Oman and Saudi Arabia. In several countries of the Sub-region, the traditional nomadic pastoralism exists besides the modern mechanized farming. The countries of the Sub-region are supporting nomadic and animal producers through subsidies. Some countries have embarked on rangeland improvement programs through rangelands use regulations. On-farm food production is becoming steadily less important for poor rural households throughout the Sub-region. Enhancing opportunities for off-farm employment and income is becoming increasingly important for rural development and welfare in the countries of the Sub-region.

Degradation of natural resources is especially serious in the low rainfall areas that represent over 70 percent of the total rangelands in the Sub-region. For the nomadic population in the Sub-region, their incomes depend directly on the rangelands' quality

and quantity. Large numbers of farmers and herders in the Sub-region have migrated from their settled areas search for water and livestock feed. The system is based on the traditional opportunistic mobility, which balances availability of feed and water with aversion of wet-disease infected areas. Degradation of range land as result of over grazing is apparent in the SNG. The Governments in the Sub-region are attempting to devote more and immediate attention to prevent major population displacements and further environmental degradation.

Nomadic and Semi- Nomadic are a strategic response to the seasonal fluctuations of the scarce resources. Pastoralism and Semi- Pastoralism in the Sub-region have been traditionally dominated by camel and sheep raising, with sheep becoming predominant in recent times due to their greater marketability. In some countries (Saudi Arabia) trucking of water, subsidized feed (barley), and foreign herders allowed them to exploit areas that would have otherwise been unavailable for livestock raising. However, continued pressure or concentration of livestock in overgrazed areas has led to irreversible degradation and desertification. This highly fragile ecosystem should, therefore, be protected as an adapted eco-social system for the livelihood and husbanding of natural resources.

The livestock nomadic system spread over a wide area of the dry and low rainfall rangelands in the Sub-region. The dry ecological zone in which this animal production system is practiced is characterized by too low or erratic rainfall to support crop production, as average rainfall is usually less than 300 mm. Cropping and livestock production activities may be practiced concurrently by pastoralists who are more or less semi- nomadic and have well established patterns of grazing migrations over a wide area.

Livestock production in the GCC is practiced under two major systems: an intensive high input commercial system and the pastoral system. The pastoral system is also of two kinds: a dominant kind consisting of large flocks based on subsidized feedstuff and foreign labor highly detrimental to rangelands and small flocks raised by small producers (real pastoralists) who can live more or less in harmony with their ecosystems and who are in need of support. Large numbers of livestock are also raised as a hobby in the vicinity of all urban centers of the GCC countries, benefiting from subsidies and cheap foreign labor, their contribution in the deterioration of the rangelands is also significant. The common tenure of the rangelands in these countries is open to all producers from within and neighboring countries is also a major cause of overuse and mismanagement.

Therefore, the above mentioned natural resources' (rangelands and forest lands in this case) degradation in GCC countries is not a result of a struggle for livelihood or against poverty, as it is in Yemen or in many poor countries, but rather the result of greed and lack of awareness about the danger of overuse and degradation, both at the decision makers as well as large public and livestock producers levels.

Based on the above, it is important to develop and adopt a different approach to deal with this situation in the SNGPF and to differentiate between the cases of GCC and Yemen. The options to be considered can be based on the management of subsidies, management

and regulations relevant to the foreign labor, rehabilitation of degraded resources, sustainable management un-degraded resources, etc.

Livestock is a crucial component for food security and rural livelihood in the SNG Sub-region. Livestock contributes substantially to the livelihoods of the population in the Sub-region and supports a large portion of the poor landless and marginalized farmers. It is an important source of protein and contributes significantly to food and nutrition security. Data on livestock population in most of the countries of the Sub-region are poor and are mostly rough estimates and projections. At present, sheep and goats population are the largest among livestock type in all countries of the Sub-region. In 2008, the number of sheep and goats was estimated around 33 million heads compared to 2.4 million heads and 1.1 million heads of cattle and camels. Number of poultry is 265 million units. The trend over the last ten years showed clearly that the percentage increase in cattle as well as camel outweigh the percentage increase in goats and sheep.

In the fisheries sector, the SNG Sub-region has become a net exporter, but its global share of trade is marginal. The capture fishery production increased from about 350 thousand tons in 1990 to a peak of 600 thousand tons in 2004, but dropped back afterwards to 460 thousand tons in 2009. The fishery sector in the Sub-region seems having reached its maximum potential production and requires strong management for its long-term sustainability. The Sub-region has a long coastal area on the Gulf, Red Sea, Arabian Sea and Indian Ocean. Aquaculture still has a great potential for growth in the SNG countries. There are a great need to improve fisheries, aquaculture management, conservation, promoting further the formulation and implementation of sustainable fisheries and aquaculture policy and strategies. The fisheries and aquaculture could contribute much more to the food security and sustainable livelihood in the Sub-region.

Despite being low forest cover sub-region, forests, trees and woodlands contribute to greening of the desert-like ecosystems, restoration of degraded lands, improvement of rural livelihood and greening of parks in cities to create better living environment for the urban populations in the SNG Sub-region. Forests, woodlands, trees and rangelands also protect and enhance biodiversity in agriculture as well as in natural ecosystems and urban areas. The countries of the Sub-region are among the poorest in forest cover. However, all countries of the Sub-region recognize the social, economic and environmental roles of forests and trees. They are making significant efforts to expand man-made forests for landscape restoration also in agro forestry in and around the urban areas. They are therefore, exerting efforts to expand their forest cover. Forestry in SNG is considered a mean for climate change mitigation as well as for restoration of degraded natural ecosystems. All the countries of the Sub-region are members of Near East Forestry and Range Commission (NEFRC). Through this regional forum, they are engaged in exchange of experiences and information sharing with the other countries of the Near East Region.

An increasing number of countries in the Sub-region, including Saudi Arabia, Kuwait, United Arab Emirates and Yemen have begun using treated waste water to irrigate forest plantations and greenbelts. Using treated waste water is essential given the scarcity of water resources in the region and the abundance of marginal lands where artificial forests

can be established using treated waste water. It is also low in cost and effective way to dispose of water and to improve the quality of forest plantations.

The food security situation has great impact on socioeconomic development and nutritional status and well-being of the population in the countries of SNG. On average for the SNG Sub-region, production has grown consistently much less than the growth in demand. The increases in crop production are achieved either by expanding cultivated area, by raising crop yields or by increasing cropping intensity. Over the years cultivation has spread onto more arid and marginal land. Little cultivable land remains uncultivated. Agricultural output growth has become increasingly dependent upon irrigation development and intensifying production per hectare, given the aridity of the Sub-region. Nevertheless, agricultural productivity in the Sub-region is relatively low in comparison to the world average (Annex 3).

The food gap in the various sub-regions of the Near East, in relation to the size of their populations, differ considerably. SNG with only 7.5 percent of the Region's population is responsible for 24 percent of that gap. The food consumption pattern and behavior of the SNG population has changed during the last few decades. This change has led to serious nutritional implications and increasing imports. These changing patterns need to be assessed from the social, economic and nutritional dimensions.

Due to increasing income and awareness, the Governments of the Sub-region are faced with the challenge to ensure the quality and safety of the food imports. To address this challenge, some countries in the Sub-region have established national committees to coordinate the work of the various administrations involved in food safety as well as national Codex committees. In addition, Members of the GCC attached high priority to the harmonization of food policies, enhancing trade flow among the SNG countries, and setting up necessary trade regulations and standards at the Sub-regional level.

With regard to the level of hunger or undernourishment, countries of the Sub-region made significant progress in raising the amount of foods available for consumption in terms of kcal/person/day which is the key variable used for measuring and evaluating the evolution of the world food situation all over the World.

As shown in Annex 5, the average Dietary Energy Indicator (DEI) per capita in SNG averaged 2803 k-calories in 2000 and reached 2862 k-calories in 2007. In Yemen the DEI increased from 2014 k-calories to only 2068 k-calories in 2007, and in Saudi Arabia from 3016 k-calories to 3144 k-calories during the same period. Annex 6 gives estimate of the numbers and percentages of undernourished people in Near East Region and Sub-regions. It shows that, while the overall percentage of undernourished people in Near East Region is below the same for developing countries, large variations exist among member countries. While the number of the undernourished people has increased in Yemen from 3.8 million in 1990-1992 (30% of the population) to 6.7 million in 2005-2007 (31% of the population), it decreased in Kuwait from 0.4 million in 1990-1992 (20% of the population) to 0.1 million in 2005-2007 (5% of the population). The average national food consumption per person in the Near East and North Africa is likely to increase from 3006

kcal in 1997/99 to 3090 kcal in 2015 and close to 3170 kcal by 2030. This is much better than Sub-Saharan Africa and Latin America and the Caribbean⁷.

Over the last four decades the contribution of agricultural exports to total exports for the Sub-region has fallen from 16% in 1970 to less than 5% in the last decade, basically due to the sharp increase in oil exports. In absolute term, the value of total agricultural exports of the SNG, which amounted to US\$6.2 billion in 2008, is growing extremely slowly, having been US\$4.6 billion in 1992-2001. The relative share of the SNG in RNE agricultural exports has dropped steadily from 54% in 1992-2001 to 40% in 2008 (Annex 7).

All of the SNG countries are net food importers with high dependence on food imports. The average gross value of the agricultural imports of the Sub-region increased from US\$ 13.36 billion in 1992-2001 (45% of the Near East total agricultural imports) to US\$32.62 billion (40% of the Near East total Agricultural Imports). The reduction in the percentages from the Near East Region is due to the higher rate of growth in agricultural imports in other sub-regions due to higher population growth rates. The increase in population and high income associated with the binding physical constraints to domestic food production, has resulted in substantial increase in the Sub-region's food imports. The food imports to the SNG countries have increased from \$ 6.530 billion in 1990 to \$ 28.093 billion in 2008. The Sub-regional exports during the same period have also substantially increased from \$ 86.839 billion to \$ 760.529 billion; with oil being the main export commodity.

As net food importers, the countries of the Sub-region face the challenge of soaring and fluctuating international food prices. High international food prices may have positive as well as negative effects⁸. Positive effects can be felt by net producers of food who should benefit from the higher prices, so long as these outweigh increases in input costs⁹. However (a) all countries of the Sub-region are net food importers and are therefore, hurt by higher prices more than they benefit from them, and (b) there exists a vast array of natural resources constraints as well as structural obstacles which shackle the supply responses of the agricultural systems in the countries of the Sub-region. The Governments of the Sub-region are in need to prepare for an appropriate and effective programmatic response to all the different risks. This should of course be closely linked with the policy work of the FAO, other international agencies, as well as national governments and other stakeholders.¹⁰

⁷FAO, World Agriculture: towards 2015/2030, p.30

⁸“Responding to the Food Crisis: synthesis of medium term measures proposed in Interagency Assessments” (FAO 2009).

⁹“Contingency Planning and Humanitarian Action: A review of practice” – HPN Network Paper 59, March 2007.

¹⁰High Food Prices and Acute Food Insecurity Risks. A Framework to Guide FAO Country Level Programmatic Contingency Planning. FAO 2011.

III. Strengths, Weaknesses, Opportunities and Threats (SWOT) evolving in the Sub-region

The following deliberation summarizes the strengths embodied in the economies as well as food and agriculture related sectors of the countries of the SNG sub-region that need to be supported and utilized in accelerating the agriculture and rural development. It also identifies the challenges and weaknesses facing the process of sustainable agriculture and rural development. The possible opportunities that needed to be tapped and the internal and external threats that the countries of the sub-region may face are also identified and briefly analyzed. In identifying the sub-regional priorities, the joint strengths and opportunities are benefited from and stressed for implementation, while the identified priority actions aim at diverting the recognized weaknesses of and threats for the sub-region.

3.1 Specific Strengths

The economies as well the food and agriculture related sectors possess strengths and positive characteristics that can support the process of sustainable agricultural, natural resources and rural development in the Sub-region. The major strengths include:

1. Excellent central geographical location.
2. Stability in most of the countries of SNG.
3. All countries strive to modernization of their agricultural and fisheries sectors.
4. No foreign exchange limitation to fund the Sub-region's food imports which supports potential investment in agriculture development.
5. Political will to alleviate poverty and conserve natural resources and biodiversity with political recognition of role of agriculture in social security, rural settlements, diversification of income sources, welfare and quality of life, food security, etc.
6. Strong economies depending on Petroleum and hydrocarbon with huge reserves representing more than 40% of World reserves.
7. Availability of land suitable for agriculture in some countries with cropping areas reaching about 3.7 million hectares in Saudi Arabia, 0.3 million hectares in UAE, and 1.6 million hectares in Yemen.
8. Experience and relatively good productivity for livestock, fishery, dates, vegetables and fruits, and others.
9. Relatively young population where percentage of youth less than 18 years old reach over 60% in some countries.
10. High income level leads to affluent population demanding safe and quality food, with average per capita GDP for GCC reaching \$17,000 in 2008.
11. Progressing Regional Grouping under the Gulf Cooperation Council (GCC) with possibilities for common policies towards economic union.
12. Strong and experienced private sector.
13. Excellent Infrastructure, i.e., roads, dams, water treatment, storage capacities, geographical distribution of research stations and education institutes, etc.
14. Competitively growing, active and prosperous market.

15. All countries have strategies or strategic frameworks for agricultural sustainable and rural development supported by action plans.
16. Capacities for increasing foreign agricultural investment (SNG agricultural investment abroad) with full recognition of global issues and developmental needs.
17. Integration with and support to global and regional initiatives (MDG; WFS; latest WFS 2010; Arab Strategy for Food Security).

3.2 Weaknesses and Common Challenges:

The SNG Sub-region faces immense challenges to achieve the goals of its member countries managing and using its natural resources in an environmentally sustainable manner while addressing the pressing issues of food security, eliminating poverty and enhancing rural development. In general, the Sub-region faces the following overall common challenges of: (1) Sustainable management of limited and environmentally-sensitive natural resources including saving water and protecting soils, preserving the fisheries potential, protecting the natural vegetation cover, and rehabilitation including transboundary diseases; (2) Sustainable availability of adequate food in quantity and in quality in terms of variety, diversity, nutrient content and safety of food include the challenges of increasing food supply only based on comparative advantage and water availability, enhancing food quality and safety, managing the quantity and prices risks, diversifying the offer of food and harnessing the SNG comparative advantages; (3) Agriculture as engine for economic diversification, rural settlement, poverty reduction and social stability; and (4) Climate changes. Within these overall challenges, the countries of SNG are encountered with the following common weaknesses:

1. Tough weather and environmental conditions also very arid Sub-region.
2. Water is the scarcest factor of production. Sporadic and highly irregular rainfall mostly in winter with an average flow ranges from 50 mm to 100 mm annually. Associated with evaporation rates reaching 3500 mm per year.
3. Agricultural water management remains one of the most formidable challenges facing the Sub-region with agriculture sectors utilizing annually about five folds the renewable water in the Sub-region.
4. Sandy and frequently salty soils add to the aridity problems in the Sub-region.
5. Ground water is very deep with irregular supply and a very high cost of extraction.
6. Lack of long term vision and strategies for water resources.
7. Lack of adequate and reliable information and statistics about water availability.
8. Relatively low environmental awareness among all stakeholders.
9. Relatively low efficiency for water utilization in agriculture with surface irrigation efficiency reaching less than 50%.
10. Past policies on water resources development and management have not been at par with sustainability and conservation principles and, as a result, have led to severe overexploitation, quality degradation and other environmental problems.
11. Excessive cost of sea water desalination for supplying irrigation water still renders such projects economically not viable.

12. Relatively frequent and strong sand storms leading to sand dune expansion causing substantial harm to crop and animal production, and hinders fishing and damages the fragile natural resource base.
13. Over utilization of rangeland in SNG leading to poor carrying capacity.
14. Loss of biodiversity and land degradation.
15. The population has increased during the past decade (from 16.3 million in 1990 to 25.7 million in 2008), but agricultural population has been declining (from 3.1 million in 1990 to 1.5 million in 2008).
16. About 30 % of the Sub-region's labour force is foreign labour.
17. Very similar agricultural production pattern in all countries.
18. Large increase in the total production from capture fisheries has already led to the overexploitation of most of the vulnerable stocks.
19. Changes in the ecosystem structure and decrease in fisheries productivity are reported in several areas of the Sub-region.
20. Over utilization of fertilizers and pesticides leading to land, animal and environmental hazards.
21. High subsidies and land distribution caused land degradation.
22. Very low investment in agricultural research and technology transfer.
23. Exposure to cereal import volatility without benefiting from existing international financial instruments to hedge against sudden and unpredictable international market price hikes.
24. As result of the development on the last four decades there were several negative practices and behaviors influences all activities and sustainable development in all the member countries.
25. Previous confusion between self-sufficiency and food security concepts that lead to achieve self-sufficiency in crops where no comparative advantage exist for the Sub-region at a very cost on depleting scarce natural resources.
26. Undernourishment has increased in the low income country of the Sub-region, Yemen, and even in high middle income countries like Saudi Arabia.
27. The prevalence of overweight and obesity ($BMI \geq 25$) in some countries of the Sub-region score very high levels (78% among males and 81.7% among females in Kuwait).
28. Weak coordination among agriculture, water and environment related institutions.
29. Weak coordination among agricultural research, extension and education institutes.
30. Low cropping intensity.
31. Weak agricultural marketing systems and presence of marketing bottlenecks.
32. Weak market information systems and inadequate food and agriculture statistics.
33. Adopting inadequate agricultural policies and subsidy systems that provided disincentive to small farmers, fishermen and herders.
34. Competing agro-processing products and industries in all countries.
35. Relative inconsistency between higher education priorities and needs of the labor markets.
36. Low participation of women in agriculture and rural development.
37. Absence or weak participation of the civil society and professional organizations in natural resources management and sustainable development.
38. Inadequate financial support to small traditional farmers, herders and fishermen.

39. Attitude of farmers, herders and fishermen is inconsistent with cooperative work and collective actions through civil organizations.
40. Lack or weak capacity in development and extension government agencies.
41. Weak enforcement of the regulations related to protecting the natural resources and need to improve these regulations.
42. Wide difference in the food control capabilities of the different countries in the local market and at the ports of entry.
43. Weak harmonization of food standards and regulations with international requirements.

3.3 Opportunities:

The countries of the SNG have several opportunities to develop further their agriculture and rural sectors in a sustainable manner. These opportunities represent a base for potential development. The major opportunities include:

1. Greater partnership between Governments and private sectors of the SNG countries.
2. Private sector is still seeking investment opportunities inside and outside the SNG.
3. More coordination and harmonization of agricultural and trade policies within the GCC to ensure fair trade and increased investment in agriculture and rural development.
4. Greater possibilities for increasing crop and livestock productivity per drop of water depending on relevant global research-based results in other regions with similar weather, environmental and resource scarcity conditions as SNG.
5. Greater possibilities for improving quality and increasing crop, and livestock productivity in rain fed areas in some of members countries (KSA, Oman and Yemen)
6. Improvement in world financial situation may lead to stabilizing the Petroleum market and hence ensuring implementation of medium and longer term plans for agricultural and rural development.
7. Orientation of agricultural and rural development towards water and environment friendly activities where only modern water saving techniques are used and encouraged through market incentives mechanisms.
8. Pursue agricultural diversification policies based on water availability and comparative advantage in the different regions of the SNG countries to utilize the existing bio-diversity, and agro-ecological zoning. The horticulture industry, in particular, which comprises fruit, vegetables, root and tubers, flowers, mushrooms and condiments offers considerable potential for job creation and income generation especially for the youth.
9. Adoption of “Conservation Agriculture” which represents a concept to achieve improved soil health and better soil, crop, nutrient and water management leading to ecological and economically sustainable agriculture, recognizes the need for a productive and remunerative agriculture which at the same time safeguards natural resources.

10. Possible coordination among countries of the Sub-region and neighboring countries to control transboundary animal and plant diseases.
11. Possible regional cooperation in the area of water resources development within transboundary and joint water basins.
12. Seizing opportunities resulting from joining WTO for six out of the seven countries of the sub-region.
13. Increasing political recognition of agriculture including forests, trees and rangelands and rural development as a key for poverty alleviation, diversifying income, rural settlement, socioeconomic development and social stability and national security.
14. Utilization of research based information to increase water supply and improve water demand management and capture the potential benefits of water harvesting technologies at a wider scale.
15. Availability of treated sewage waters and marginal lands for multi-purpose afforestation, e.g., landscape restoration, greening in and around urban areas and provision of wood and non-wood products and services.
16. Nutrition-sensitive food and agriculture-based approaches can be adopted for improving diets and raising levels of nutrition in collaboration with other sectors including health, employment and social protection.
17. Support for new and existing rural cooperatives should be made in order to include disadvantaged groups across the region, such as women, youth and migrant workers.

3.4 Threats

The following is a brief review of the current and potential internal and external threats facing the sustainable agriculture and rural development in the SNG countries:

1. Political instability and conflicts in some countries (Bahrain and Yemen in 2011) and natural disasters such as droughts, floods, and outbreak of plant and animal pests, e.g., desert locust, and trans-boundary animal diseases and other disasters in other countries of the sub-region may have consequences in delaying the implementation of development plans and programmes in these countries and the whole sub-region. Conflicts can particularly lead to lower production and Dietary Energy Availability (DEA) as well as causing serious food insecurity, substantial damage to physical and human infrastructure that support farming, e.g., extension services, crop and animal production and protection, forestry, fisheries, range management, agricultural research and private food marketing and processing industries. Political instability and the persistence of armed conflict also threaten the socio-economic progress.
2. Climate changes that already prevailed in the Near East and the Arab region may lead to negative impacts on crop, livestock, forests and fisheries production in the medium and longer terms.
3. Extensive degradation of the natural ecosystems in forests and rangelands threatening at the long term livelihood and food security due to the loss of biodiversity and land fertility and irreversible loss of productive capacity.

4. Increase fire risks, and change the spread patterns of pests and diseases with increased probability of epidemic outbreaks as a result of the vulnerability of rangelands, forests, woodlands and livestock to climate change as they are located mostly in marginal areas, impacting nomadic systems and dynamic livestock pest and disease distribution and their transmission patterns.
5. Possible world recession leading to reducing governments' revenue and reducing public expenditure and investment.
6. Policies adopted by exporting countries, especially during international food crises, to ban food exports or to reduce competitiveness of agricultural exports of developing countries.
7. The effect of fish trade globalization on the national fishing sectors including the risk of overexploitation and depletion of fishery stocks, and food security.
8. Continuing unauthorized well digging and lack of immediate and effective legislation to control it leading to increasing water scarcity and deteriorating natural resources.
9. Slowdown of implementing progressive sustainable agricultural and rural development strategies may lead to increase immigration from rural to urban areas due to lack of incentives in rural areas constituting economic and social instability.
10. Continuing high population growth rates constituting a pressure on limited natural resources.

IV. The Strategic Framework

The strengths, weaknesses, opportunities and threats presented in the foregoing analysis provide a broad picture of the critical needs of the Sub-region and suggest the priority framework within which the underlying issues could be addressed. Based on a thorough discussion during the consultation meeting of between 4 to 7 October 2010 in Cairo, these needs are condensed into five regional priority areas and to five SNG Sub-regional priority areas. These Sub-regional priority areas are linked to several key areas of intervention including policy, institutions, regulation, capacity development, trade, investment, and information management. The priority areas and priority actions are identified to reflect a vision and a mission for the FAO Sub-regional Office for the GCC States and Yemen to serve the member countries.

As a flexible and responsive tool, the Priority Framework for the Sub-regional Office for the countries of the Cooperation Council for the Arab States of the Gulf and Yemen (SNGPF) will be revised every two years, to include new development arising from country programmes, from the changes in the overall FAO strategic priorities or at the request of member countries in the Sub-region.

The development of the strategic priorities framework including the vision, mission and strategic objectives of the SNG Sub-region has followed a participatory approach as explained above. The Priority Framework for the Sub-region (SNGPF) was basically guided by country's needs, FAO global strategy, and the Priority Framework for the Near

East Region¹¹. FAO and countries commitments to global and regional initiatives such as WFS; WFS:5yl; and the MDGs are also closely considered in preparing the SNGPF.

Consistent with the FAO global vision and the vision of the FAO Regional Office for the Near East, the vision of the Gulf Sub-regional Priority Framework (SNGPF) is to ensure sustainable natural resource management while achieving a food-secure sub-region. The countries of the sub-region recognize that food security does not mean self-sufficiency. Food security is realized through strategies, policies, programmes and projects that ensure: (1) food availability through local production, only when comparative advantage in utilizing the scarce natural resources exist, or through importation from the world market; (2) access to and consumption of adequate food in quantity and quality in terms of variety, diversity, nutrient content and safety by all segments of the population through nutrition education and consumer awareness for improved food choices and by enhancing the purchasing power of the needy segment of the societies; (3) stability in food supply and prices to provide incentives to producers, consumers and traders and to reduce risks through market-based measures; and (4) appropriate and safe food to meet the demand of all the population in the SNG countries and to cater for the needs of the segments of the society of special needs such as women, pregnant women, children in the first 1000 days of life and those under the age of 5 years, etc.

The FAO mission in the Sub-region is to enhance food and nutrition security, as defined above, by assisting Members to, protect and enhance natural resources with special reference to water resources; develop policy and regulatory frameworks in food, nutrition, agriculture, fisheries and forestry; and promote knowledge generations, institutional capacity development, and Sub-regional cooperation in related fields to sustainable food and agricultural development. The FAO Sub-Regional Office (SNG) will assume a leadership role in coordinating the implementation of the SNGPF and its monitoring. To this end, SNG will work closely with the FAO Regional Office and potential country offices in the Sub-Region as well as the FAO technical divisions in Rome and, as appropriate, with partners from governments, civil society and private sector in the sub-region, UN system and the donor community/partners in development.

The following five Strategic Priority Areas have been identified jointly by the SNG Sub-region as targets on which FAO assistance need to be focused in 2011-2019¹². Each sub-regional priority area is presented by providing a rationale, a summary of issues and challenges to be addressed and the key priority actions identified for the sub-region. The objectives of the identified priorities are in conformity with those identified in the RPF for the Near East¹³.

¹¹ FAO – Thirtieth FAO Regional Conference for the Near East, “FAO Regional Priority Framework for the Near East”, NERC/10/7, Khartoum, the Republic of the Sudan, 4-8 December 2010.

¹² The sequencing of the stated priorities within the RPF is different. Natural Resources Management was stated as first priority for the SNG countries due to the severity of the water resources problem/issue in the sub-region. Other natural resources are equally important but the scarcity of the water resources is a controlling factor.

¹³ FAO – Thirtieth FAO Regional Conference for the Near East, “FAO Regional Priority Framework for the Near East”, NERC/10/7, Khartoum, the Republic of the Sudan, 4-8 December 2010.

Priority A: Natural Resource Management

The Sub-region's critical shortage of water and cultivable land, including the pressure on these resources and their degradation make their efficient management a paramount task. Appropriate management of demand could orient water and land to their best use between crop, livestock, fisheries and natural vegetation cover. A holistic approach to water and resources management is the first step in addressing the challenges the Sub-region is facing and to identify working solutions. Crops, Livestock and fisheries are particularly important food resources in all countries of the Sub-region, which makes preservation and sustainable management of soil, water, rangelands and marine ecosystems resources an important priority. The livestock sector is characterized by large numbers of traditional smallholders and pastoralists in support of livelihoods and rural food security in addition to intensive commercial livestock production, supporting the national food supply system and providing employment to producers and others in associated processing, distribution, marketing and support services. While traditional livestock systems contribute to the livelihoods of a large number of the rural population in the Sub-region, increasing numbers of large-scale operations with sophisticated technology, based on internationally sourced feed and animal genetics, cater for the rapidly growing markets for meat, milk and eggs. Developing the management of the fisheries sectors in particular is of special importance to the SNG sub-region. The Sub-region still has a great untapped potential for increasing the efficiency of the fisheries sector. In general, forestry, although limited, plays an important role in the preservation of the natural environment and the mitigation of climate change impacts. Increasing efficiency of water and land use through new technologies could expand production as well as increase the use of these resources for food and poverty alleviation. Opportunities for water harvesting, reutilization of waste water, and enhancement of rangeland have great potential in all countries of the Sub-region. It will be necessary in this regard to promote the engagement and participation of all stakeholders in planning and managing water, land and genetic resources in addition to promoting sub-regional cooperation on trans-boundary water management.

The Objectives of Sub-regional Priority A are: (1) Ensuring availability of water to support agriculture and food security for today and the future; (2) Ensuring sustainable management of forest, trees and range land resources in contribution to food security, climate change mitigation and water conservation; (3) Protecting and preventing soil, and combating desertification; (4) Enhance efficiency of livestock production and combat animal transboundary diseases; (5) Increasing fisheries and aquaculture production in a sustainable manner; and (6) Conserving genetic resources and biodiversity.

The key Priority Actions for the Sub-region under Priority Area A includes:

1. Strengthen the contribution of agriculture in rain fed areas (with special reference to KSA, Oman and Yemen) to support food security, sustainable water use, poverty alleviation and socio-economic development.

2. Adopt and manage modern irrigation systems and water-saving techniques.
3. Enact rules and regulations for sustainable water use, particularly ground water.
4. Support the formulation and analysis of policies on water resources development and management (including social rights, related regulatory framework and economic returns, etc.) to be at par with sustainability and conservation principles.
5. Consider reforming incentive structure and policies for higher water use efficiency.
6. Develop national plans for the re-use of treated waste water for agriculture.
7. Safe use of brackish water for salt-tolerant production system where economically feasible and environmentally safe.
8. Strengthen of the Good Agricultural Practices (GAP).
9. Support capacities for strict compliance to the Code of Conduct to protect fisheries resources.
10. Provide more support to Regional Commission for Fisheries (RECOFI) to address pressing needs and challenges in member countries.
11. Enhance existing fisheries databases.
12. Encourage the multiple use of water from aquaculture.
13. Develop national capabilities for human resources/all personnel involved in Food and Agriculture through the whole value-chain.
14. Review institutional and regulatory policies related to food and agriculture labor market.
15. Enhance the capacity of national cadre leading the irrigation extension service, as well as regulating and coordinating the private sector extension activities.
16. Strengthen the efforts towards achieving sustainable development of forest, rangelands, urban forestry and natural parks.
17. Encourage the participation of local communities and private sectors in all forest and rangelands programmes, projects and activities.
18. Reorganize and strengthen natural resources management institutions including water, land, forestry and rangelands and develop relevant policies and strategies for harmonization at national level with the other economic sectors and across the Sub-region.
19. Support joint action through the Near East Forestry and Range Commission and in the framework of international conventions, fora and congresses, especially in international negotiations on climate change, biodiversity, desertification, global forest resources assessment conducted by FAO every 5 years.
20. Raising environmental awareness.
21. Strengthen the contribution of livestock to food security, poverty alleviation and economic development.
22. Strengthening the veterinary control of the major animal diseases and the associated human health risks.
23. Strengthen national research and extension institutions and human capacity development.
24. Develop and integrate Agriculture and Rural Development Statistics in the National Statistical Systems for improved monitoring, evaluation, decision making and planning.

The primary tools will be the promotion of new technology and technical assistance for capacity development in improving natural resources management and supporting the technical and institutional capacities in that regard.

The key expected results include sub-regional assessment and monitoring, improved natural resources management, effective approaches to biodiversity protection including establishing partnerships, and enhanced stakeholder participation in the sustainable management of scarce natural resources.

Priority B: Food and Nutrition

With a limited and fragile natural resource base, a high population growth and an increasing demand for food, the Sub-region is structurally unable to feed itself. In addition, both the prevalence of high poverty rates in some pockets in the countries of the Sub-region and inadequate food consumption patterns are major causes of food insecurity and malnutrition. The Sub-region has wealthy (except for Yemen) but resources-poor and food-deficit countries, which make the food security challenges of this Sub-region somewhat unique.

While maintaining the sustainable utilization of the scarce natural resources, the Objectives of Sub-regional Priority Area B are: (1) Strengthening national capacities for policy development aimed at achieving food and nutrition security objectives, and the implementation, monitoring and evaluation of actions taken, supported by an efficient information system for food and nutrition security; and (2) Contributing to the eradication of food insecurity at individual, national and sub-regional levels in line with World Food Summit (WFS) targets and Millennium Development Goals (MDGs).

The key Priority Actions for the Sub-region under Priority Area B includes:

1. Improve food safety, quality and nutritional standards.
2. Promoting community-based interventions, especially backyard gardening and school gardens that target women and school children to improve their nutritional wellbeing and as a source of income generation for families, non-distortive social safety nets, policy measures and awareness programmes, and campaigns.
3. Raise awareness among the different population groups on healthy diets, good nutrition and food safety in the context of rapidly changing food habits.
4. Stabilize food supply and prices through market-based risk management approaches and diversification programmes.
5. Promote food availability based on comparative advantages and efficient economic return to water, imports, or investment abroad while reducing losses both in economic value as well as in nutritional value at all stages of the value chain.
6. Enhance the capacities of the countries in the use of international concepts, methodologies, and classifications and appropriate tools for collecting, analyzing and disseminating quality and reliable information on food and nutrition security for all data users.

7. Enhance technical and institutional capacities for agricultural investment abroad under responsible investment and agreed code of conduct among countries of the GCC for the benefit of receiving and investing countries.
8. Enhance the capabilities of food inspection and food standards setting in the countries of the Sub-region.
9. Support decent rural employment generation as a means to increase access (and production) to nutritious food.

Stress will be made on enhancing food safety and standards to meet the demand for the safe and nutritional food. Stress will be made also on enhancing productivity for crops and livestock products with efforts to reaching the potential for the fisheries sectors in the Sub-region. The importance of appropriate technology transfer and supporting the agricultural research, extension and education systems is of special interest to the countries of the Sub-region.

The primary tools to be used include the analysis of the vulnerability for food insecurity, improved means of information gathering and dissemination, including improved and reliable agricultural statistics, assistance to member countries in strengthening capacities in formulating strategies, policies and implementation plans for reducing food insecurity and unemployment, ensuring market stability through market-based risk management measures, and promoting inter-regional collaboration on matters of common interest.

The expected results include improved policies and strategies for sustainable crop and animal production, intensification and diversification at national and regional levels, strengthened capacities to formulate and implement coherent policies and programmes that address the root causes of hunger, food insecurity and malnutrition, and improved capacity of member countries to address specific nutrition concerns.

Priority C: Rural Development and Role of Agriculture in Food and Nutrition Security and Poverty Reduction

Agriculture can play a significant role in economic diversification, increasing incomes, alleviating food insecurity, reducing rural poverty, combating unemployment, and enhancing rural settlement and social stability. Agriculture remains a critical element in the livelihood of the rural population and people in the Sub-region. With increasing the availability of renewable water resources, many parts of the Sub-region have extremely promising potentials for raising production of high value food products, including horticulture, olive oil and fish products for which there is an emerging market, both internal and external.

The Objectives of Sub-regional Priority Area C are: (1) Unleashing the potential of agriculture as a major contributor to poverty reduction and maximizing its role in income generation and support to livelihoods; (2) Promoting the commercialization of agriculture; and (3) Diversifying agriculture into high value added activities in terms of both money and nutrient content.

The Priority Actions for the Sub-region under Priority Area C includes:

1. Support Regional Economic Cooperation and Integration of Food and Agriculture Policies and Trade Regulations
2. Develop strategies, programmes and policies for sustainable and integrated rural development to ensure sustainable utilization of water and natural resources and to integrate agriculture investment with social service sectors for the benefit of small farmers and to ensure highest return and impact on rural livelihood.
3. Capacity building for the human resources throughout the whole value-chain.
4. Enhance policies and programmes to make agricultural occupations more attractive for youth (create conditions to reduce the pull factors out of agriculture).

The primary tools will be the promotion of new technology and technical assistance for capacity development in primary production and secondary value addition and other agribusiness areas.

The expected results include enhanced access to food, social settlement and improved livelihood for the rural population, and strengthened institutional and technical capacity for countries to: (i) analyse developments in international agricultural markets, trade policies and trade rules; (ii) increase awareness and capacity to identify trade opportunities and to formulate appropriate and effective pro-poor trade policies and strategies; (iii) formulate nutrition and gender-sensitivity, inclusive and participatory policies in agriculture and rural development; and (iv) develop national and regional policies, regulations and institutions to enhance the developmental and poverty reduction impacts of agribusiness and agro-industries.

Priority D: Climate Change

As in other parts of the Near East, climate change is likely to affect agriculture and food security in the Sub-region primarily through changes in temperature, precipitation, extreme climatic events and sea level. These may result in such adverse effects as further deterioration of water scarcity, land degradation, crop failures, loss of rangeland and other vegetation covers, livestock deaths, and fisheries production and quality decline. Governments, public institutions and farmers, particularly the poor producers, need to be supported in their efforts to adapt to climate change.

The key objectives of Sub-regional Priority Area D are: (1) Improving national and sub-regional capacities to cope with adverse impacts of climate change; (2) Identifying practices for adaptation and mitigation of climate change impacts; and (3) Reducing the contribution of agriculture to climate change.

The major Priority Actions for the Sub-region under Priority Area D includes:

1. Address adaptation to Climate Change as a Sub-regional, Regional and Global issue of major concern.
2. Use early warning systems as effective tool to identify adaptation activities.

3. Enhance institutional and technical capacities in monitoring and evaluation of climate change impacts.
4. Coordinate efforts with partners in development/donors/funding agencies on a Sub-regional scale to address the problem.
5. Strengthen the cooperation in the research activities aimed at developing adaptive approaches and techniques.

The primary tools will be assistance to member countries in policy advice; technical assistance; capacity building; and advocacy for change.

The expected results include strengthened policy capacities and improved human and institutional capacities for climate change adaptation.

Priority E: Preparedness for, and Response to Emergencies

As in other Near East countries, the Sub-region is prone to many types of disasters, both natural and human-induced that add to the chronic poverty and hunger particularly among those with limited coping capacity. The capacities of the countries of the Sub-region for adopting proactive steps towards disaster management are still limited. Improving national capacity to respond to food and agricultural threats and emergencies must become an integral component of the food security and sustainable agricultural development efforts in the Sub-region. This is vital on the face of recurrent unanticipated supply shocks caused by natural phenomenon like drought and disease; and human-induced phenomenon such as global and regional sudden supply and demand shifts that create market failures.

The Objectives of Sub-regional Priority Area E are: (1) Enhancing capacities for disaster response and risk reduction; (2) Linking relief efforts with long term sustainable development; and (3) Mitigating long term impacts of disasters.

The major Priority Actions for the Sub-region under Priority Area E includes:

1. Forecasting and providing early warning of adverse conditions in the food and agricultural sector.
2. Need assessment and formulation and implementation of programmes for relief and rehabilitation (including an assessment of the needs of disadvantaged groups, such as women, youth migrants, etc.).
3. Enhancing capacity for monitoring, detection, prevention and mitigation of disasters including transboundary plant and animal diseases, and pest infestation.

The primary tools are efficient information systems, advocacy and technical assistance, collaboration and partnership on regional mechanisms, and regional networking and capacity building.

The expected results include well formulated plans and better prepared institutions to deal with agricultural threats and emergencies.

Cross Cutting Issues

Besides the sub-regional priority areas, the following cross-cutting themes are identified:

- Rural development, including employment creation in rural areas,
- Generate, manage, analyze and access data and statistics for improved food security and better nutrition,
- Knowledge generation, exchange and sharing,
- Strengthen national research and extension institutions and human capacity development in all areas across the commodities value chains,
- Gender equity, and development of the participatory approach in natural resources management, and
- Sub-regional cooperation in all fields related to sustainable food and agricultural development.

These issues will be promoted as supportive actions to achieve the sub-regional results.

IV. Implementation of the Sub-regional Priority Framework (SNGPF)

The purpose of this section is to provide an overview of the implementation arrangements within the technical capacities of the FAO newly established SNG, technical support envisaged from the FAO Regional Office for the Near East in Cairo (RNE) and the FAO Headquarters in Rome. Special attention will be given to collaboration with FAO HQ on technical areas that are not included in the skill mix of the multi-disciplinary teams in the decentralized offices of the region. The implementation arrangements for the SNGPF will stem from the new results-based management approach in the Organization¹⁴.

The Immediate Plan of Action for FAO's Renewal (IPA) approved by the 35th (Special) Session of the FAO Conference in November 2008 laid the foundation of an enhanced results-based approach to programme planning, implementation and reporting in the Organization. It provided the basis for preparing during 2009 the Strategic Framework 2010-19, Medium Term Plan 2010-13 and Programme of Work and Budget 2010-11, which were endorsed by the 36th Session of the FAO Conference in November 2009.

Within the above identified sub-regional priorities, the Sub-regional Office for the Countries of the Cooperation Council for the Arab States of the Gulf and Yemen (SNG) with the support of the FAO networks in the Near East Region and Headquarters will contribute to Organizational Results (ORs) and Strategic Objectives articulated in the FAO Strategic Framework, following the results-based approach, Annexes 9 and 10. The FAO Core Functions that will be primarily used include: (a) monitoring and assessment of

¹⁴ FAO - Thirties FAO Regional Conference for the Near East, Implementation of the PWB 2010-11 and Priority Areas of Action for the Near East Region for the Following Biennium, NERC/10/5, Khartoum, the Republic of the Sudan, 4-8 December 2010.

long-term and medium-term trends and perspectives; (b) assembly and provision of information, knowledge and statistics; (c) development of international instruments, norms and standards; (d) policy and strategy options and advice; (e) technical support to promote technology transfer and build capacity; (f) advocacy and communication; (g) inter-disciplinary modality and innovation; and (h) partnerships and alliances.

As the priorities of the Sub-region have been endorsed by Member countries within the RNE-RPF, the SNGPF is to be translated into operational action plans contributing to the FAO strategic results hierarchy, to be reflected in the Sub-regional Programme of Work and Budget, starting in 2012. The SNGPF will also inform and will be informed by the Country Programming Frameworks (CPF) and the FAO Country Workplans. Starting in 2012 and with completing the staffing of the SNG, regular monitoring will identify achievements, success factors, obstacles, lessons learnt and actions required to improve the performance of the programmes, in line with the results-based monitoring and reporting systems currently being developed and deployed by the Organization.

The FAO capacities in the sub-region will be significantly strengthened with the staffing of the SNG. The working approaches in the Sub-region will be revised to promote interdisciplinary work while keeping a focus on achieving the FAO Organizational Results (ORs) identified in the SNGPF.

The FAO Sub-regional Office SNG will include high level expertise for carrying out the sub-regional inter-disciplinary work focusing on the SNGPF's priority areas. The SNG technical international staff will cover the following disciplines¹⁵:

1. Water and Soil
2. Agricultural Policies
3. Food Safety and Food and Nutrition Security
4. Agricultural Investment
5. Livestock
6. Fisheries

With the recruitment of these experts, the decentralized expertise in the Region¹⁶ will reach 37 technical staff covering the following disciplines: food systems; nutrition and food safety; irrigation and water resources; land tenure; plant production; plant protection; controlling the desert locust; animal production and health; forestry; fisheries; environment; agro-industries; information technology; knowledge and information management for development; agricultural investment; policy analysis and assistance; trade policies; regional and country project operations and field programme development.

For an effective implementation of the SNGPF, the mix of expertise in the Near East Region (RNE) and the Sub-region (SNG) will be organized and streamlined focusing on the identified priorities and building synergies between technical areas in a highly

¹⁵Most of these disciplines will be covered by short term consultants for 2011 while recruitment procedures are finalized for the long term experts.

¹⁶In RNE, SNE, SNO and SNG.

participatory manner to address the various facets of the inter-disciplinary nature of these priorities and their expected results.

The implementation will be facilitated by establishing thematic taskforces of experts in SNG, similar to those under establishment in RNE, around three core areas: agricultural and food systems; economic, social and policy assistance; and natural resources and climate change at the Sub-regional level. In addition, the technical and operational linkages among the Sub-regional Office, Regional Office and country offices will be strengthened and made more coherent guided by the ongoing FAO reform on decentralization.

Field Programme Development and Mobilization of Resources

The field programmes development and implementation in the Sub-region incorporates a substantive portfolio of projects spanning a wide spectrum including agriculture, fisheries, forestry, nutrition and food safety, food security and others. These projects were developed prior to the establishment of SNG and the experience gained and lessons learned in the formulation and implementation of these projects and related operational support represents a valuable service to member countries in the Sub-region. As most of the member countries of the Sub-region are high or middle high income countries, except Yemen, the regional and country Technical Cooperation Programme (TCP) will be made coherent with the SNGPF to act as a spearhead for field programmes development at the sub-regional and national levels and initiate actions toward the formulation of Unilateral Trust Fund (UTF) programmes/projects. In the case of Yemen, the TCP will continue to be based on the country needs/requests as reflected in the Country Programming Frameworks (CPF). SNG technical staff with the support of RNE and Headquarters technical staff shall provide valuable technical backstopping and support to these programmes and projects.

The resources needed for the implementation of the SNGPF will be funded mainly through the extra-budgetary resources. The Sub-regional Office will assess the funding gap and reach out to donors in and outside the Sub-region to promote cooperative programmes to address sub-regional needs and priorities in areas of mutual benefit. Resource mobilization for extra-budgetary resources will be carried out in close collaboration with the FAO Technical Cooperation Department to align the strategy of resource mobilization at the regional level with the institutional strategy of FAO. Close collaboration with the FAO Resource Mobilization and Operations Support Service (TCSR) and RNE will ensure a streamlined approach and process for resource mobilization effort.

Partnerships

In the framework of the FAO Partnership Strategy, and the RNE Priority Framework (RPF), SNGPF will be used as a platform for building partnerships with key players in the Sub-region, including Regional and Sub-regional Organizations, Regional and Sub-regional Financing Institutes, UN Agencies and Networks, Technical Organizations, Civil Society (CSO) and Non-Governmental Organizations (NGO) and Private Sector. SNG

plans to intensify partnership with all partners in development. To this aim, the SNGPF will be presented to the Regional and Sub-regional Organization, the UN agencies and the donors active in the Region and Sub-region.

A high priority will be given to Partnerships for advocacy on major FAO goals and for knowledge and experience sharing in support of Sub-regional cooperation. The collaboration with the General Secretariat of the GCC is of special interest to SNG and is crucial for programme development and monitoring for the Sub-region. The close collaboration and partnership with the Islamic Development Bank (IDB) in Jeddah is also of special interest to SNG. The partnership with the Arab Planning Institute (API) and the Arab Fund for Economic and Social Development (AFESD) in Kuwait will also be initiated. The role of the regional and sub-regional commissions and existing active regional thematic networks¹⁷ covering major themes for the Sub-region, including water, policy, and knowledge dissemination will be strengthened. SNG will promote partnerships with NGOs and CSOs in the Sub-region in support of the objective of sustainable agricultural and rural development and sustainable food security. Recognizing their role in agricultural development, SNG will seek opportunities to work in partnership with the farmers' associations and the private sector to promote sustainable management of natural resources and to alleviate poverty, through knowledge sharing and investment

Already established UN frameworks provide an excellent basis to work with partners. The FAO Sub-regional Office aims at strategically positioning FAO in the UN wide system in the Sub-region, in pursuit of the achievement of the World Food Summit and the MDGs in the Sub-region. SNG aims at strengthening its relations with the UN agencies, IFAD and the World Bank. The FAO Sub-regional Office will also collaborate with its UN partners within the Sub-regional /UNDG framework to raise awareness on issues of strategic importance, such as Sustainable Water and Natural Resources Management, Food Security and Climate Change and to provide assistance to the UNCTs with regard to the UNDAFs.

The SNGPF will be used as a dialogue and advocacy tool to strengthen the collaboration with major regional organizations, including the League of Arab States (LAS), Arab Organization for Agricultural Development(AOAD), and the Organization for Islamic Countries (OIC), in the areas of natural resources management, food security, and agricultural development. The SNGPF will also be used to strengthen the technical collaboration with technical agencies based in the Near East Region, such as ICARDA, ACSAD, and ICBA.

¹⁷ They include, inter alia: the Agricultural Food Marketing Association for the Near East and North Africa Region (AFMANENA), AARINENA (Association of Agricultural Research Institutions in the Near East and North Africa), NENARACA (Near East and North Africa Regional agricultural credit Association), CARDNE (Regional Centre on Agrarian Reform and Rural Development for the Near East), Inter-Islamic Network on Water Resources Development and Management NENARNAP (Near East and North Africa Regional Network for Agricultural Policies), NERAKIN-RAIS (Near East and North Africa Rural & Agricultural Knowledge and Information Network), RADCON (Rural and Agricultural Development Communication Network), SESRTCIC (Statistical, Economic and Social Research and Training Center for Islamic Countries).

Follow-up, Monitoring and Evaluation

Following the endorsement of Member countries during the thirtieth Session of the NERC held in Khartoum, Sudan, December 2010, and upon the completion of the recruitment of the staff of SNG, the SNGPF is to be translated into pragmatic and operational action plans contributing to the FAO strategic results hierarchy through the formulation of Sub-regional Results, to be reflected in the Sub-regional Programme of Work and Budget starting in 2012. The SNGPF will inform and will be informed by the Country Programming Frameworks (CPF) and the FAO Country Workplans.

Starting in 2012, regular monitoring will identify achievements, success factors, obstacles, lessons learnt and actions required to improve the performance of the programmes, in line with the results-based monitoring and reporting systems currently being developed and deployed by the Organization. This will provide critical feedback for further refinement and adjustments in the action programmes. To this end, information will be continuously collated within the context of the Sub-regional Programme of Work and Budget mechanisms. In addition, particular thematic evaluations will also need to be periodically conducted for specific purposes such as advocacy, raising awareness and resource mobilization. The RPF is, therefore, a living document that evolves over time.

Within the FAO Strategic Framework, and in close collaboration with member countries and partners in development, the decentralized network in the Sub-region is fully committed to the implementation of the SNGPF.

The SNGPF shall be revised each biennium to reflect new development arising from country programmes, from the changes in the overall FAO Strategic Priorities or at the request of the member countries.

Annex 1
Some Macroeconomic Indicators in the Near East(2008)

COUNTRY	POPULATION		GDP			Total	Agric.
	TOTAL	AGRIC.	TOTAL	Agric.	Per Capita	Trade	Trade
						Net	Net
	1000	%	(Bill\$)	%	\$	(Mill.\$)	(Mill.\$)
Bahrain	791	1.0	13.2	0.9	16968	6965.7	-653.3
Kuwait	2985	1.1	61.4	0.4	23072	62589.6	-2249.6
Oman	2845	29.2	26.6	2.0	10779	14581.7	-1590.2
Qatar	1409	0.8	39.8	0.1	38960	28692.6	-1645.8
KSA	25391	5.5	238.8	3.9	10045	198315.0	-10952.6
UAE	4599	3.2	112.8	2.8	26441	62000.0	-6937.9
Yemen	23580	39.8	12.4	11.5	560	-1474.8	-2399.9
SNG	61930	19.1	504.0	2.9	17194	371669.8	-26429.2
SNE	86871	22.9	208.2	12.4	2962	66209.5	-14653.8
SNO	220388	21.2	389.8	11.0	2394	38190.0	-24433.7
Total RNE	369189	21.2	1102.0	8.8	7517	476069.3	-65516.7

Source: World Bank Indicators
FAOSTAT

Annex 2

Trade Balance by Sub regions and countries in the Near East Region for the period 1992- 2001 and 2008 (000 US\$)

	Average 1992-2001			2008		
	Total Import	Total Export	Trade Balance	Total Import	Total Export	Trade Balance
Bahrain	4,239,483	5,193,561	954,078	10,350,000	17,315,700	6,965,700
Kuwait	7,701,216	15,985,702	8,284,486	24,874,100	87,463,700	52,589,600
Oman	5,180,778	9,654,318	4,473,540	23,137,300	37,719,000	14,581,700
Qatar	2,955,215	8,879,732	5,924,517	27,900,000	56,592,600	28,692,600
KSA	29,963,988	65,044,967	35,080,979	115,147,000	313,462,000	198,315,000
UAE	44,281,548	67,999,550	23,718,002	177,000,000	239,000,000	62,000,000
Yemen	2,470,623	2,827,889	357,267	10,451,700	8,976,900	-1,474,800
SNG	96,792,852	175,585,719	78,792,868	388,860,100	760,529,900	371,669,800
SNE	33,092,687	38,691,119	5,598,432	117,244,290	183,453,750	66,209,460
SNO	48,014,798	37,619,885	-10,394,913	190,691,600	228,881,640	38,190,040
Total RNE	177,900,336	251,896,723	73,996,387	696,795,990	1,172,865,290	476,069,300

Source: FAOSTAT

Annex 3

Comparisons of Yield of Selected Crop in the Near East Region to other Regions (2009)
(MT/Ha)

	Wheat	Rice, paddy	Maize	Potatoes	Oranges	Grapes	Sugar beet	Sugar cane
Bahrain	0	0	0	25.56	0	2.6	0	0
Kuwait	2	0	21	27.65	7.5	1	0	0
Oman	3.33	0	0	28.42	0	0	0	23.8
Qatar	2.67	0	18	10	0	3	0	0
KSA	6.09	0	5.62	24.97	0	15.14	0	0
UAE	2	0	0	25.48	0	2	0	0
Yemen	1.97	0	1.5	12.93	13.61	9.59	0	0
SNG	3.01	0	11.53	22.14	10.55	5.56	0	23.8
SNE	1.47	4.26	1.74	17.76	13.66	5.36	51.6	68.1
SNO	2.71	5.79	7.4	23.71	16.54	10.57	35.28	65.6
RNE	2.4	3.35	6.89	21.21	13.59	7.16	28.96	52.5
World + (Total)	3.02	4.2	5.12	17.98	16.12	9	53.08	70.91
Africa + (Total)	2.29	2.44	1.87	11.82	12.21	9.6	46.89	59.67
Europe + (Total)	3.74	6.14	6.08	19.73	20.12	6.78	54.25	80

Source: FAOSTAT

Annex 4
Self Sufficiency Ratio for Selected Products (SSR) % (Average 2005-2008)

Country	Cereals Total	Wheat	Maize	Rice	Pulses	Potatoes	Total Vegetables	Total Fruits	Total Meat	Poultry Meat	Total Milk Equivalent	Eggs
Algeria	16.11	16.54	0.05	0.45	20.14	94.27	99.66	94.24	86.70	99.56	49.12	99.70
Libya	8.56	6.56	0.62	0.00	55.27	96.94	99.78	89.02	82.75	99.97	41.63	87.60
Mauritania	33.04	1.30	91.24	53.96	95.36	25.27	8.65	85.22	94.89	49.01	76.64	81.78
Morocco	51.15	56.11	6.78	89.91	85.98	100.44	110.14	122.08	99.10	99.60	81.99	100.01
Tunisia	30.53	39.40	0.00	0.00	79.35	90.09	100.59	105.93	97.29	99.41	96.88	99.75
Average	31.42	33.45	2.69	29.32	62.88	95.78	103.60	106.05	92.89	99.12	64.71	98.22
Bahrain	0.00	0.00	0.00	0.00	6.23	0.33	16.28	29.08	27.61	16.82	9.66	36.72
Kuwait	0.45	0.23	0.76	0.00	0.00	38.16	50.15	12.44	30.24	20.64	14.21	61.21
Oman	3.70	0.75	0.00	0.00	0.00	23.59	70.63	72.41	36.24	9.39	46.99	42.71
Qatar	2.44	0.02	7.42	0.00	0.00	0.21	23.06	22.50	12.16	8.14	9.83	29.98
KSA	19.87	93.54	9.70	0.00	7.14	101.02	86.51	66.53	54.62	55.14	70.82	109.72
UAE	0.00	0.00	0.00	0.00	0.00	8.30	42.90	69.12	21.09	12.65	11.20	38.08
Yemen	19.96	7.15	16.97	0.00	64.59	99.67	109.10	106.48	73.34	59.01	46.56	100.46
Average	16.52	36.22	9.49	0.00	20.78	81.85	72.90	71.35	46.52	42.24	46.91	83.68
Egypt	69.68	55.32	60.20	112.93	45.63	110.20	101.62	103.98	86.11	98.66	90.85	100.24
Iran	69.39	84.90	39.86	66.69	97.62	101.75	103.05	100.77	97.47	100.69	96.02	102.43
Iraq	31.96	24.85	88.69	22.56	46.67	82.41	85.54	102.31	67.34	45.35	61.44	59.04
Jordan	1.75	0.92	3.96	0.00	7.02	87.13	176.20	82.41	71.11	86.71	67.88	107.69
Lebanon	18.63	27.71	1.13	0.00	25.05	108.97	91.71	142.84	82.05	100.46	46.70	119.82
Syria	60.55	143.07	16.24	0.00	173.12	102.77	117.07	100.86	99.35	98.79	94.50	99.86
Average	62.13	61.43	49.05	86.49	72.90	103.09	102.62	102.75	90.48	96.22	89.83	99.07
Average	47.01	49.78	35.95	70.31	62.41	99.64	100.21	98.97	79.44	79.03	76.70	96.57
Average	100.23	100.31	100.10	100.31	100.06	99.99	100.10	100.37	100.65	101.02	100.69	100.04

Calculated from FAOSTAT: Crop (Area; Production.), Animal

Annex 6
Prevalence of undernourishment in Near East Countries

	1990-1992		1995-1997		2000-2002		2005-2007	
	Number Mill.	% of Country's Population	Number Mill.	% of Country's Population	Number Mill.	% of Country's Population	Number Mill.	% of Country's Population
Algeria	ns	-	1.5	5	1.4	5	ns	-
Libya	ns	-	ns	ns	-	ns	ns	-
Mauritania	0.2	12	0.2	9	0.2	8	0.2	7
Morocco	1.5	6	1.6	6	1.6	6	ns	-
Tunisia	ns	-	ns	ns	-	ns	ns	-
SNE								
Bahrain	-	-	-	-	-	-	-	-
Kuwait	0.4	20	0.1	5	0.1	6	0.1	5
Oman	-	-	-	-	-	-	-	-
Qatar	-	-	-	-	-	-	-	-
KSA	ns	-	ns	ns	-	ns	ns	-
UAE	ns	-	ns	ns	-	ns	ns	-
Yemen	3.8	30	5	31	5.7	31	6.7	31
SNG								
Egypt	ns	-	ns	5	ns	5	ns	-
Iran	ns	-	ns	ns	-	ns	ns	-
Jordan	-	-	-	-	-	-	-	-
Lebanon	-	-	-	-	-	-	-	-
Syrian	ns	-	ns	ns	-	ns	ns	-
SNO								
RNE								

Source: <http://www.fao.org/economic/ess/ess-fs/en/>

Annex 6

Prevalence of undernourishment in Near East Countries

	1990-1992		1995-1997		2000-2002		2005-2007	
	Number Mill.	% of Country's Population	Number Mill.	% of Country's Population	Number Mill.	% of Country's Population	Number Mill.	% of Country's Population
Algeria	ns	-	1.5	5	1.4	5 ns	-	
Libya	ns	-	-	ns	-	ns	-	
Mauritania	0.2	12	0.2	9	0.2	8	0.2	
Morocco	1.5	6	1.6	6	1.6	6 ns	-	
Tunisia	ns	-	-	ns	-	ns	-	
SNE	0.4	20	0.1	5	0.1	6	0.1	
Bahrain	-	-	-	-	-	-	-	
Kuwait	0.4	20	0.1	5	0.1	6	0.1	
Oman	-	-	-	-	-	-	-	
Qatar	-	-	-	-	-	-	-	
KSA	ns	-	-	ns	-	ns	-	
UAE	ns	-	-	ns	-	ns	-	
Yemen	3.8	30	5	31	5.7	31	6.7	
SNG	3.8	30	5	31	5.7	31	6.7	
Egypt	ns	-	-	5 ns	-	5 ns	-	
Iran	ns	-	-	ns	-	ns	-	
Jordan	-	-	-	-	-	-	-	
Lebanon	-	-	-	-	-	-	-	
Syrian	ns	-	-	ns	-	ns	-	
SNO	ns	-	ns	ns	-	ns	-	
RNE	-	-	-	-	-	-	-	

Source : <http://www.fao.org/economic/ess/ess-fs/en/>

Annex 7

Agricultural Trade Balance by Sub regions and countries in the Near East for the period 1992- 2008
(000 US\$)

	Average 1992-2001			2008		
	Total Import	Total Export	Trade Balance	Total Import	Total Export	Trade Balance
Bahrain	418,722	31,332	-387,389	709,446	56,442	-653,004
Kuwait	1,126,487	43,593	-1,082,895	2,297,071	47,434	-2,249,637
Oman	1,066,828	395,795	-671,033	2,471,884	881,686	-1,590,198
Qatar	988,598	9,410	-979,188	1,671,131	25,303	-1,645,828
KSA	4,707,472	445,275	-4,262,197	12,266,274	1,313,640	-10,952,634
UAE	2,577,415	802,231	-1,775,184	10,602,785	3,664,883	-6,937,902
Yemen	2,470,623	2,827,889	357,266	2,600,685	200,729	-2,399,956
SNG	13,356,145	4,555,525	-8,800,620	32,619,276	6,190,117	-26,429,159
SNE	6,583,297	1,272,728	-5,310,569	18,236,385	3,582,563	-14,653,822
SNO	9,266,687	2,704,163	-6,562,524	30,006,835	5,573,151	-24,433,684
RNE	29,206,129	8,532,416	-20,673,713	80,862,496	15,345,831	-65,516,665

Source: FAOSTAT

Annex 8

Renewable Water Resources, water used (km³/yr) 2008

Sub-Region	Country	RWR				Total water use by country				Water use for agriculture			
		TRWR	IRWR	% of TRWR	Total Withdrawal	% of TRWR	% of IRWR	Agric. water withdrawal	% of TRWR	% of IRWR			
SNG	Bahrain	0.116	0.004	3.4	0.3574	308.1	8935	0.1592	137.2	3980			
	Kuwait	0.02	0	0	0.9132	4566	0	0.4919	2459.5	0			
	Oman	1.4	1.4	100	1.321	94.4	94.4	1.168	83.4	83.4			
	Qatar	0.058	0.056	96.6	0.444	765.5	792.9	0.262	451.7	467.9			
	KSA	2.4	2.4	100	23.666	986.1	986.1	20.82608	867.8	867.8			
	UAE	0.15	0.15	100	3.998	2665.3	2665.3	3.312	2208	2208			
	Yemen	2.1	2.1	100	3.4	161.9	161.9	3.06	145.7	145.7			
	Total	6.244	6.11		34.0996			29.27918					
	Average			97.9		546.1	558.1		468.9	479.2			
	Total	57.262	45.442		27.426			22.289					
Average			79.4		47.9	60.4		38.9	49				
SNO	Total	292.66	178.11		246.541			213.0602					
	Average			60.9		84.2	138.4		72.8	119.6			
	Total	356.17	229.67		308.067			264.6284					
Average			64.5		86.5	134.1		74.3	115.2				
RWR	Renewable Water Resources												
TRWR	Total Renewable Water Resources												
IRWR	Internal Renewable Water Resources												

Annex 9
The Sub-regional Priorities Mapped to FAO Organizational Results (ORs)*

Sub-regional Priorities	A Sustainable intensification of crop production			B Increased sustainable livestock production			C Sustainable management and use of fisheries and aquaculture resources			D Improved quality and safety of food at all stages of the food chain			E Sustainable management of forests and rress			F Sustainable mgnt. of land, water & genetic resources to & improved resources to global environmental challenges affecting food & agriculture			G Enabling environment for markets to improve livelihoods and rural development			H Improved food security and better nutrition			I Improved preparedness for, and effective response to food and agricultural threats and emergencies			K Gender Equity in access to resources, goods, services, and decision making in the rural areas			L Increased and more effective public and private investment in agriculture and rural development		
	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3	1	2	3			
A. Sustainable Management of Natural Resources				x									x	x					x	x													
B. Enhancing Food and Nutrition Security	x		x				x	x				x																					
C. Fostering Agricultural Production and Rural Development to Improved Livelihoods		x										x	x																				
D. Responding to Climate Change Impacts and Developing Adaptation Strategies													x																				
E. Preparedness for and Response to Food and Agriculture Emergencies		x																															
Total 30 ORs	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1				

*Detailed list of Organizational Results is presented in Annex 9. A number of ORs of cross-cutting nature such as in gender (Strategic Objective K), policy (Strategic Objective X), statistics and exchange of knowledge (H04 & H05) apply to all the five Sub-regional priorities.

Annex 10

List of FAO Organizational Results (ORs)

- A01 Policies and strategies on sustainable crop production intensification and diversification at national and regional levels
- A03 Risks from pesticides are sustainably reduced at national, regional and global levels
- A04 Effective policies and enabled capacities for a better management of plant genetic resources for food and agriculture (PGRFA) including seed systems at the national and regional levels

- B01 The livestock sector effectively and efficiently contributes to food security, poverty alleviation and economic development
- B02 Reduced animal disease and associated human health risks
- B03 Better management of natural resources, including animal genetic resources, in livestock production

- C01 Members and other stakeholders have improved formulation of policies and standards that facilitate the implementation of the Code of Conduct for Responsible Fisheries (CCRF) and other international instruments, as well as response to emerging issues
- C02 Governance of fisheries and aquaculture has improved through the establishment or strengthening of national and regional institutions, including RFBs
- C03 More effective management of marine and inland capture fisheries by FAO Members and other stakeholders has contributed to the improved state fisheries resources, ecosystems and their sustainable use
- C04 Members and other stakeholders have benefited from increased production of fish and fish products from sustainable expansion and intensification aquaculture
- C06 Members and other stakeholders have achieved more responsible post-harvest utilization and trade of fisheries and aquaculture products, including more and harmonized market access requirements

- D03 National/regional authorities are effectively designing and implementing programmes of food safety and quality management, control, according to norms

- E02 Policy and practice affecting forests and forestry are reinforced by international cooperation and debate
- E03 Institutions governing forests are strengthened and decision-making improved, including involvement of forest stakeholders in the development of forest policies and legislation, thereby enhancing an enabling environment for investment in forestry and forest industries. Forestry is better integrated into development plans and processes, considering interfaces between forests and other land uses
- E06 Environmental values of forests, trees outside forests and forestry are better realized; strategies for conservation of forest biodiversity and genetic resources, climate change mitigation and adaptation, rehabilitation of degraded lands, and water and wildlife management are effectively implemented

- F01 Countries promoting and developing sustainable land management.
- F02 Countries address water scarcity in agriculture and strengthen their capacities to improve water productivity of agricultural systems at national and -basin levels including transboundary water systems.
- F06 Improved access to and sharing knowledge for natural resource management
- G03 National and regional policies, regulations and institutions enhance the developmental and poverty reduction impacts of agribusiness and agro-industries.
- G04 Countries have increased awareness of and capacity to analyze developments in international agricultural markets, trade policies and trade rules to identify trade opportunities and to formulate appropriate and effective pro-poor trade policies and strategies
- H01 Countries and other stakeholders have strengthened capacity to formulate and implement coherent policies and programmes that address the root causes of hunger, food insecurity and malnutrition.
- H03 Strengthened capacity of member countries and other stakeholders to address specific nutrition concerns in food and agriculture.
- H04 Strengthened capacity of member countries and other stakeholders to generate, manage, analyze and access data and statistics for improved food security and better nutrition.
- HO5 Better access to FAO analysis and information products and services on food security, agriculture and nutrition, and strengthened capacity to exchange knowledge).
- I01 Countries' vulnerability to crisis, threats and emergencies is reduced through better preparedness and integration of risk prevention and mitigation into, programmes and interventions.
- I02 Countries and partners respond more effectively to crises and emergencies with food and agriculture-related interventions
- I03 Countries and partners have improved transition and linkages between emergency, rehabilitation and development.
- K03 Governments are formulating gender-sensitive, inclusive and participatory policies in agriculture and rural development
- L01 Greater inclusion of food and sustainable agriculture and rural development investment strategies and policies into national and regional development and frameworks.
- L 02 Improved public and private sector organizations' capacity to plan, implement and enhance the sustainability of food and agriculture and rural development investment operations.