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AGRICULTURAL COMPETITIVENESS: MARKET FORCES AND POLICY CHOICE

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*The Impact of Economic Transformation on the
Development of Rural Areas in Central and Eastern European Countries*

INTRODUCTION

Central and Eastern European countries entered a phase of dynamic transformation of their political systems in 1989. In Poland, this phase had its roots in the assumption of power by a non-communist government. The economic, social and political systems are all subject to transformation. A very complex process, of unprecedented scale, has begun, consisting of a return to the original system of economic organization; which, in effect, amounts to the process of restoration of capitalism. An unsuccessful experiment to build up and maintain a communist system, which continued for over 70 years, has come to an end.

The experience of change undoubtedly deserves comprehensive study, since it relates to a region inhabited by over 323 million people, with 327 million hectares of cultivated land, about 270 million tons of cereal production and more than 100 million head of cattle. Taking these numbers into account, it is clear that the change is of global significance as well as being a matter of importance within the region itself as it struggles to make a success of economic reforms (Brooks, 1993). There is some fear that the world agricultural market may become destabilized as a result of the breakdown in the internal equilibrium which has existed in the countries of the region (Tyers and Anderson, 1992).

Analysis of the new situation is not an easy task, for obvious reasons. First and foremost, the period of time to make any suitable observations relating to Poland, as an example, is much too short – only four years. In the cases of other countries (especially those of the former Soviet Union), the time is even less. Every individual country in the region is at a different stage of transformation. In addition, the statistics (which are also in a state of transformation and are going through ‘a creative destruction’ process) contain many gaps, which makes it difficult, or even impossible, to carry out a comprehensive analysis of changes occurring in the economic system. At the same time, many external disturbances have distorted the course of the transformation process. These include the disbandment of COMECON (the Council for Mutual Economic Assistance), the crisis in the Near East, the war in the former Yugoslavian countries and the splitting of Czechoslovakia into two separate, independent

*Centralny Urząd Planowania, Warsaw, Poland. Paper presented by P. Halmi.

states. In addition, it has to be said that the faith which the countries of the region placed in international organizations and external expert advice was much too strong, and often very naive. In particular, the countries which employed patterns of adjustment suggested by the International Monetary Fund found them to be inadequate when applied to their specific and largely diversified economic and social situations.

It is not surprising, therefore, that considerable differences regarding the progress of the transformation process are found in the reports of many international organizations and research centres relating to individual countries in the region. These include the Economic Commission for Europe (ECE, 1992), the International Monetary Fund (IMF, 1994), the Organization for Economic Cooperation and Development (OECD, 1994), the Food and Agriculture Organization (FAO, 1993b) and the United States Department of Agriculture (1993a, 1993b). However, regardless of these differences, it is possible to distinguish certain groups of countries on the basis of the stages reached in their reforms. The first group includes Poland, Hungary, the Czech Republic and the Slovak Republic. It seems that they have already decided upon their pattern for further transformation. The second group consists of countries exhibiting a lesser degree of advancement, though they appear to be developing in a satisfactory direction. Should there be no unexpected political factors, further courses for reform have also been established. This group includes, in particular, the three Baltic states (Lithuania, Latvia and Estonia). The third group comprises mainly the Commonwealth of Independent States (CIS), where much friction is occurring in carrying out reform. One cannot exclude the possibility of a return to a system resembling the former command economy (the central planning system).

In this paper a description of the course of transformation in agriculture is supplemented by a short examination of the major problems involved, at present and in the future.

MACROECONOMIC TRANSFORMATION AND AGRICULTURE

Transformation processes in the post-communist countries have many characteristics in common. It appears that this is mainly due to the type of proposals developed by external experts associated with the International Monetary Fund and the World Bank. There are three general characteristics. The first is a liberalization of economic activity, including a removal of restrictions for the state-owned enterprises, relaxation of prices, opening up of the state borders for international trade, convertibility of the domestic currency (to a limited extent) and introduction of anti-monopoly regulations. The second includes measures to provide for macroeconomic stabilization (the inflation check) through restrictive money supply policy, abolition of state subsidies, removal of exchange rate and wages control, cuts in other budgetary expenses, maintaining positive interest rates and developing free market institutions. The third characteristic includes privatization of state-owned enterprises, land and banks.

In the course of transformation there are evidently many achievements to note. The major and most important ones include the following:

- (1) The emergence of commodity and services markets, which provide purchasers with a possibility of making a free choice. A shift from a producer to a consumer orientation is a major achievement which can only be properly assessed from the viewpoint of those who used to live in an era of constant shortages of commodities, which lasted permanently in the command economy. Competition from external producers of commodities is also appearing and free market institutions have begun to develop.
- (2) An arduous privatization process has already been started, though with different intensity in individual countries. The development of an essentially new legal framework was needed, including the establishment of ownership and reprivatization laws and breaking through many obstacles due to objections raised by many vested interests.
- (3) In the majority of countries in the region, hyperinflation was checked, though the inflation rate still runs at a high level.

These successes were achieved at a very high price in economic recession, inflation, unemployment, real income decline and financial problems among firms.

Table 1 contains information relating to changes in gross domestic product (GDP). In 1990–93 the countries in the region experienced a sharp decline, of about 20 per cent or more. Only by 1994 (according to projections available at the time of writing) was there likely to be a GDP increase in the majority of

TABLE 1 *GDP growth rates in Central and Eastern European countries, 1989–94¹*

Countries	1989	1990	1991	1992	1993	1994
Poland	0.2	-11.6	-7.6	1.5	4.0	4.5
Hungary	0.4	-3.3	-10.8	-4.5	-2.0	0.0
Czech Republic	4.5	-1.2	-14.2	-7.1	-0.3	2.5
Slovak Republic	1.1	-2.5	-11.2	-7.0	-3.7	4.0
Albania	9.8	-10.0	-29.9	-8.0	8.0	8.0
Bulgaria	-2.2	-9.1	-11.8	-7.7	-6.2	-2.8
Romania	-5.8	-5.6	-12.9	-13.6	-1.2	0.3
Russia	2.5	-2.0	-9.0	-19.0	-12.0	—
Ukraine	3.6	-1.5	-10.0	-13.9	-16.0	—
Belarus	4.7	-2.8	-8.8	-16.8	-10.0	—
Lithuania	1.1	-9.7	-12.8	-31.5	-16.2	4.7
Latvia	5.7	-1.2	-8.3	-43.9	-13.0	5.0
Estonia	3.3	-8.1	-11.0	-32.3	-9.0	6.4

Note: ¹1994 forecast.

Source: OECD (1994).

countries, though that was not expected in the CIS and Bulgaria. Within the same period (1990–93) global GDP growth amounted to 10 per cent.

A still bigger drop was noted in industrial output (by 30 per cent and more), though a considerable part of that (about one-third or one half) occurred as the result of inclusion in the statistics of worthless goods, or so-called 'pure socialist production' (*The Economist*, 1993). It does not, however, change the fact that this drop had an impact on investment (which decreased by about 40 per cent) and consumption. Reduction in output was accompanied by a rise in unemployment, where the rate exceeded the average rate calculated for the European Union countries, which amounted to about 11 per cent in 1993. The percentages were: Albania, 19.5; Bulgaria, 17.1; Czech Republic, 3.5; Poland, 15.7; Russia, 5.1; Romania, 10.2; Slovak Republic, 14.4; Hungary, 12.1 (IMF, 1994). Of course, the figures relate only to registered unemployment, besides which there is considerable 'hidden unemployment'.

Relaxation of prices from government control, abolition of government subsidies and adjusting credit conditions to market demands contributed to a three- or even four-digit hyperinflation. Despite a steady drop in the rate it remains high: in the Central European countries it amounts to 'tens' per cent, and in the Commonwealth of Independent States and in Romania it remains at several hundred per cent.

Macroeconomic conditions had a strong impact on agriculture. The first outcome was a large decrease in the apparent demand for food products, though consumption decreased less, mainly owing to elimination of waste in trade and in processing. Imports also began to appear. Demand became a barrier to increasing agricultural output, a feature which did not exist on a large scale in a region which had experienced constant shortage under the previous economic system. The producers faced the necessity of answering a basic question: who will buy our products? The impact on agriculture caused by a drop in domestic demand was further strengthened by worsening of export conditions as the result of a collapse of trade among the post-communist countries after the disbandment of COMECON.

Secondly, the implementation of the idea of opening up the economy to the world market turned out to be too quick and there was lack of preparation. Allowing world market prices, often reduced by large export subsidies granted by Western governments, to affect internal markets without sufficient customs and import quota protection, while simultaneously facing almost hysterical demonopolization and pro-Western attitudes in society, caused a decrease in domestic output. Polish farmers, it has been said, were subjected to an amount of free market therapy impossible to imagine in Western Europe (*The Economist*, 1992). Though the changes were less marked, this statement also applies to producers of agricultural products in other countries of the region.

Third, macroeconomic policy resulted in deteriorated terms of trade facing agriculture (the cost–price discrepancy index). It was caused by elimination of state subsidies for food products, means of production and services in agriculture. The demand barrier for agricultural and food products blocked the possibility of there being compensating price increases and, in the majority of countries in the region, the cost–price discrepancy index deteriorated almost by half, compared with the period before the transformation.

A fourth significant result of the macroeconomic transformation is the emergence of unemployment, which also affects rural areas. Its impact cannot be said to be only one-sided. In Poland, the lack of opportunity outside farming creates an impediment to desirable changes in agrarian structure, by hindering introduction of necessary changes to improve efficiency and effectiveness. It appears likely that the same effect is going to be seen in the countries which have just afforded themselves a dispersed structure of land ownership, such as Albania and Romania.

The impact on the volume of output illustrated in Tables 2 and 3 was severe enough to cause a fall, up to 1993, to levels no higher than in the mid-1970s in the Central European countries, and to the level at the beginning of the 1980s, in the countries of the former Soviet Union (FAO, 1993a). The information does, however, indicate some signs of there being a break in the recession in 1994 in some of the countries for which forecasts were available (Table 2) and it is suggested that improvement might continue. The cost-price discrepancy index should not deteriorate further from its long-term trend since the main causes of change are probably at an end. For example, subsidies have now largely been abolished, import prices are at world levels, agricultural servicing trades have become increasingly demonopolized and the trade disruptions due to the disbandment of COMECON are no longer having an impact. There is no doubt that, at present, the volume and the structure of agricultural output are

TABLE 2 *Volume of gross agricultural output (per cent change from previous year)*

Countries	1990	1991	1992	1993 ¹	1994 ²
Albania	-6.8	-23.9	14.3	11.7	8.0
Bulgaria	-6.0	-0.3	-12.0	-20.2	3.2
Czech Republic	-3.2	-8.9	-11.8	0.6	2.2
Hungary	-4.7	-6.2	-19.9	8.5	—
Poland	-5.5	-1.6	-10.9	2.2	2.0
Romania	2.2	0.8	-13.3	11.0	4.0
Slovak Republic	-4.4	-8.2	-12.6	-6.6	-13.9
Estonia	-13.1	-4.0	-18.6	-17.0	-5.0
Latvia	—	-3.6	-13.0	-16.0	—
Lithuania	-8.9	-4.3	-23.8	-8.0	2.4
Russia	-7.5	-11.7	-9.0	-4.0	—
Ukraine	-3.2	-8.9	-11.0	-1.0	—
Belarus	-15.4	-3.8	-16.0	2.0	—

Notes: ¹Provisional.

²Forecast.

Source: OECD (1994).

TABLE 3 *Indices of food and agricultural production, 1979–81 = 100*

Countries	1989	1990	1991	1992	1993
Albania	115.7	113.3	93.4	113.5	107.7
Bulgaria	99.1	93.1	82.9	77.3	71.8
Czechoslovak	127.7	124.7	117.3	106.0	—
Hungary	114.0	105.4	114.4	85.9	87.4
Poland	116.8	119.4	114.8	103.1	114.3
Romania	97.9	84.9	84.3	67.4	74.5
Former USSR	119.9	118.9	106.1	99.5	97.7
Europe	109.7	109.0	108.5	105.8	104.4
World	122.6	125.5	125.7	128.0	127.0

Source: *FAO Quarterly Bulletin of Statistics*, 6 (4), 1993.

better adjusted to market demands in comparison with the period before the transformation.

AGRICULTURAL RESTRUCTURING

Despite these problems, progress has been made in agricultural restructuring. The difficult process of reinstating private ownership of land and of decollectivization has begun, though it is being undertaken in different ways in the various countries and it differs in extent. For example, in Albania and Romania, all collective farms have been privatized through the transfer of land to private hands, thus creating small private farms. A similar approach has been adopted by the Baltic states, though there the cooperative and state-owned farms have generally been transformed into partnerships. That is a widely used form of ownership for transforming the previous arrangements, except in Poland, which is the only country within the entire region with prevailing private ownership in agriculture where, even under the former command economy system, three-quarters of the land remained in private hands. For many years, state-owned farms utilized no more than about 18 per cent of the land, with cooperative farms accounting for only about 4 per cent of the total cultivated area. At present in Poland, state-owned farms are being restructured towards privatization, a process which is supervised by a special government agency, the State Treasury Agricultural Ownership Agency.

The progress of privatization in the region can be judged considerable, taking into account the fact that only two or three years have elapsed in which to deal with the complexity of the issues to be settled. However, there is still much to do. Poland has had over two million private farms which have existed for many years, though the remaining countries of the region have roughly three million recently established private farms, with the greatest numbers being in Romania (about two million), Russia (about 300 000) and Lithuania (over 100 000). In short, the state-owned and cooperative sectors in agriculture

still maintain a dominant role in the majority of countries in the region, and have only been affected by transformation into partnerships and some partition into smaller organizational units.

There has also been a development of market institutions which are intended to stabilize the agricultural market, allow for competitiveness, support the development of rural areas and allow the modernization of agriculture. In this connection, administrative departments have been created to deal with the management of state property, agricultural credit institutions and agencies to support modernization of agriculture and rural areas have been set up, and institutions characteristic of a market economy (exchanges, auctions, modern banking systems and information centres) have emerged. However, despite many positive changes, the market is often still disabled and its efficiency is far from optimal.

TRANSFORMATION DILEMMAS

The transformation in the countries of the Central and Eastern European region, besides having some evidently positive effects which have gained public approval, has also resulted in some degree of disillusion. This may arouse social tension or even provoke an outbreak of social conflicts, thus reversing the course of reforms. The social equilibrium which is emerging is very fragile, especially in the countries of the former Soviet Union. In addition to the high inflation rate, they are threatened with severe unemployment, which in Russia amounts to 18 million people, and projections are not very optimistic in this respect (ECE, 1992; OECD, 1994).

One cannot, however, expect wide social acceptance of the transformation results in view of a ten-year stagnation in the countries of the region in terms of the volume of GDP, high inflation and unemployment, and deterioration in standards of living within the larger part of the society. All of that has resulted in an increased frequency of strikes and demonstrations, and an uncertain future for many people. There is some apparent contradiction here, since the full cost of the transformation has to be paid immediately, though the results can be expected only in the future. There is, therefore, considerable controversy about the speed at which transformation should be attempted: should it be sudden (the 'big bang' approach) or evolutionary? The arguments for and against each solution are well known, though there is no clear proof in favour of one or the other. That also applies to the transformation of agriculture and its adjoining sectors (ERS USDA, 1993a).

One of the basic dilemmas in agriculture still centres on restructuring. The issue here is that the countries of the region cannot themselves afford the type of rapid reorganization and privatization of agriculture that took place in the former German Democratic Republic (East Germany). Capital inflow in the countries is insufficient to allow the provision of pensions for the workers in agriculture on such a large scale as in East Germany. There, since 1990, almost 80 per cent of the workforce in agriculture has retired (Hallman and Thiele, 1993). In the countries of the former Soviet Union, a 'peasantry' does not, in fact, exist and, though the rural areas are becoming desolate, those who remain

there are accustomed to their collective farms – kolkhozes and sovkhoses (Emel'ianov, 1992) – and do not want to establish and run their own farms. According to sociological research, only 5–6 per cent of people in rural areas choose to work on an independent basis (Petrikov, 1993). Therefore the prospects for private agriculture, especially in Russia, are very limited. It is estimated that the share of private farms (excluding cultivation of infields) in the year 2000 may amount to only 12–15 per cent (Kozlov, 1993). In other countries of the region, the rural areas have not been devastated to such a large extent but the privatization process is impeded by a lack of capital, insufficient professional qualifications of villagers, large indebtedness of farming enterprises, an insufficient legal framework and ineffective geodetic services necessary to reorganize land holding. All of this contributes to slowing down the course of privatization and to the virtual abandonment of large areas of land as production decreases, leaving it to lie fallow. In this context, transforming collective and state properties into joint stock companies, much preferred in Russia and Belarus, seems a reasonable solution (Krestowski, 1993).

The rapid deterioration of the cost–price discrepancy index and the decline in agricultural production have obviously been accompanied by a dramatic fall in the income level of the rural population. The people affected cannot search for work in the urban areas, owing to existing unemployment there. At the same time, the need to cut government budgetary expenditure does not allow for provision of sufficient social protection. The income gap thus tends to increase, and is accompanied by the development of so-called 'poverty spheres' within the rural areas, with people often finding themselves in a dramatically serious situation. Problems do vary in their scale; they are least in the Czech Republic, but greatest in the Commonwealth of Independent States. The dilemma is how to adjust the pace and scope of transition to foster the competitiveness of the best farms and at the same time either provide the opportunity of finding alternative sources of income or increase social assistance.

The problems of the income situation often result in the support of the old structures of power and at the same time exert pressure on the state to act. While the need for some state intervention is not questioned, its scope and form is debatable. The pressure which farmers and consumers try to exert is to obtain increased incomes for the former (who are aware of the extent of protection and assistance applied within the European Community) and to suppress the prices for food products for the latter. This is taking place in a situation in which financial possibilities are incomparably smaller than in the West. All countries of the region have, in fact, substantially reduced state subsidies to agriculture and food products, and in the countries most advanced in the transformation process they have been abolished. The producer and consumer subsidy equivalent indices (PSEs and CSEs) are many times smaller than those in the highly developed economies (excluding New Zealand and Australia). In the countries of the former Soviet Union, subsidies remain substantial, although they too have been reduced many times. In Russia, for example, subsidies to agriculture and food in 1986–90 amounted to 12 per cent of GDP; by 1992, the figure had fallen to only 2 per cent. There are signs, however, of a reversal of this movement (ERS USDA, 1993a). The list of items to subsidize becomes increasingly long, to include tax exemptions, agri-

cultural credit subsidies, fuel subsidies, donations to funds for establishing farms, seed production subsidies and the support of herds for cattle breeding.

It is obvious that maintaining or restoring the method of supporting incomes in agriculture through prices and subsidies may be dangerous. It results not only in a distortion of the market mechanism but also in growing costs, accompanied by growing contrary pressure from the taxpayers. Drawing from the experience of developed economies, one finds many arguments against this method of solving the income-related problem in agriculture, although this experience also proves that there is not an easy and simple solution. It seems, therefore, that a better way would be to promote indirect action, though it has to be admitted that this is potentially costly. Measures could include subsidies to technical and social infrastructure in the villages, creating and disseminating new developments in agriculture, education, agricultural credit preferences and creating alternative non-farm jobs. An important need is to channel the transfer of funds, especially in the transition period, towards social protection in the form of pensions and benefits.

Another role for state intervention is agricultural market regulation, namely stabilization to reduce disturbing fluctuations. Though developed countries enjoy a stabilized market economy, the countries in transition are only beginning to build up the necessary mechanisms, mainly drawing on outside experience, and attempting to find a path towards appropriate degrees and forms of intervention. For a number of reasons the effects of stabilizing actions have not been satisfactory. Often they appear to have resulted in shortages of commodities despite there being large domestic excess production potential. There is no doubt about the necessity for state intervention in dealing with monopolistic tendencies in the sectors which supply inputs to, or process products from, farms. The immediate need is to privatize large state-owned establishments, such as agricultural food-production enterprises, artificial fertilizer producers, and tractor and agricultural machinery plants.

Finally, there are important questions to settle relating to the definition of the role of agriculture in overall socioeconomic development on the assumption that major macroeconomic disturbances will be avoided in the future. The role cannot be restricted only to issues related to the provision of food and its security of supply, and to the contribution of agriculture to the basic macroeconomic magnitudes of GDP and employment. Trade and social and environmental issues are also important.

Growth in efficiency appears vital since the agricultural market has turned into an international one, though it is still subject to the effects of assistance and protection of their producers on the part of the developed economies. Trade with the West, either in exports or the import of materials and requisites, and some food products, is difficult and there are therefore suggestions that the countries of the region should attempt to restore their mutual trade in agricultural and food products, instead of relying on Western countries (Brooks and Braverman, 1992).

However, there is a view that 'development' is a broader concept than implied by such efficiency indicators as the rates of production and productivity growth (Koester, 1993). It relates also to the more general state of economic and social living conditions in rural areas, and to the condition of the

ecological environment. Taking into account the many side-effects of large-scale production in agriculture (such as ecological consequences, depopulation of rural areas, loss of cultural values and the tendency for much of the benefit to accrue mainly to consumers as a result of a relative decline in the price of agricultural goods), it is not easy to answer the question of whether an excessive dispersion of land among newly created private farms (for example, the two million of Romania), which clearly limits the possibilities for increasing the efficiency of production, is preferable to higher degrees of concentration. There is no explicit answer to that fundamental dilemma, or to the related question of whether there is a need to promote the concept of 'sustainable development' within smaller-scale family farming.

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