



Food and Agriculture
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Association of European
rural land Institutions

Towards the Creation of a European Land Observatory

Context

In January 2015, the European Economic and Social Committee published an opinion warning against land concentration and its risks for family farming. In 2017 and again in 2023, the European Parliament, by a large majority, reiterated the need to facilitate farmers 'access to land and to support the renewal of generations in agricultural holdings. Concurrently, national legislative initiatives, such as those from the French Parliament (2023), have developed frameworks to better adapt land access regulation, including on the corporate market, thereby better protecting national interests.

The rising trend in agricultural land prices, driven by changes in agrarian structures and land pressure, is an increasing problem in Europe. This inflation complicates land acquisition for new generations of farmers, favouring the concentration of farms and land acquisitions by large landowners and investors. This dynamic poses a challenge for EU countries, especially those most recently integrated, some of which experienced a moratorium on the sale of agricultural land until the early 2010's and now must regulate rural land access. All of the above must be considered in a broader context of climate change, the energy transition, biodiversity conservation and hence is related to numerous other aspects, such as sustainable forest management in a green economy, deforestation, free agri-food chains, Europe's biodiversity framework – to name only a few.

The Resolution on the Renewal of Generations in the EU in 2023 has proposed the creation of a European Land observatory. This issue was recently confirmed by the report of the Strategic Dialogue on the future of EU agriculture (September 2024). This report will be the cornerstone of the Commission's next initiatives. The European Land observatory is absolutely necessary to support national public policies and improve European strategies.

In response to these challenges, a group of actors and institutions has formed to propose the creation of a European Land Observatory. Civil society, through proposals like those from some farmers 'unions, also actively participates in these discussions, emphasizing the need for a coordinated and integrated approach to support sustainable and inclusive agricultural, forest and broader rural-related land sectors in Europe.

National and regional land observatories, global networks and action frameworks exist already and can serve as models or partners for this European Land Observatory. For example, the Network of the European Association of Rural Land Institutions (AEIAR) and the Global Land Observatory as joint initiative of the FAO, ILC, and CIRAD provide valuable expertise. The idea is thus to build on the existing to better respond, in partnership, to Europe's present needs.

Objectives of the European Land Observatory

The European Land Observatory will be an essential tool for studying evolution of land, agrarian structures, the distribution of ownership and tenancy regimes, agricultural land prices, as well as dynamics of farm concentration and agricultural land artificialization. In order not to isolate (artificially) these dynamics, a broad approach – including rural land structures and lands with forest, etc. – will also be included in support of an integrated sustainable development approach.

1. **Monitor, Document, and Analyse Land Trends:** The observatory will centralize available data collection tools, particularly those of Member States, to monitor and share data, specifically related to:
 - a. The evolution of agrarian structures,
 - b. The evolution of land access modes (purchase, rental, corporate market including share-deals, delegated work),
 - c. The distribution and typology of ownership and tenancy regimes, the typology of owners and investors (including non-EU investors),
 - d. The evolution of land prices and speculation issues,
 - e. Evaluate land concentration: Study the dynamics of farm concentration and their impact on rural areas and agricultural sustainability,
 - f. Assess land artificialization: Study the conversion of agricultural, forest and rural land to non-agricultural uses characterized by a loss of productive use (abandonment, artificialization). This includes evaluating the impacts of these trends on rural territories, biodiversity (including forests) and agricultural sustainability,
 - g. The identification of other emerging trends.
2. **Support land policy and legal reforms, initiatives and instruments:**
 - a. Provide data and information to review and inform the development of national policies, regulating land acquisition and protecting agricultural land, as well as European policies encouraging Member States to regulate agricultural, forest and rural lands. This includes supporting initiatives that facilitate land access for new farmers and promoting sustainable land use practices,
 - b. Evaluate the impact of existing and future EU policies on farmlands and farmlands markets.
3. **Support coordination and partnership building:**
 - a. Coordinate existing national and regional land observatories and support their implementation where they don't exist,
 - b. Coordinate with existing institutions and partnerships: On one hand, collaborate with relevant European Commission directorates, such as Eurostat, DG's FISMA, AGRI, ENVI as well as national institutions responsible for collecting the relevant information (*i.e* primary collectors of data, statistical offices, national/regional observatories). On the other hand, facilitate international and European collaboration, building a framework to engage the different relevant national and international organizations and networks engaged in land monitoring,
 - c. Bring together the various land-related sectors (agriculture, forest, rural), in view of promoting a more integrated approach to sustainable land development and natural resource management.
4. **Promote sustainable and inclusive rural transformation, agri-food systems and natural resource management:**
 - a. Promote and advocate for policies and practices supporting sustainable and inclusive agricultural development and natural resource management (including food sovereignty as part of national security). This includes emphasizing the importance of family farming, access to land, sustainable forest and natural resource management – covering aspects related to generational renewal, equitable land and natural resource distribution, and land regulation,
 - b. Increase transparency and public awareness: Enhance transparency of land transactions and ownership through public reports and data sharing. This will raise awareness among policymakers, stakeholders, and the general public about land issues.

Methodology

The European Land Observatory will be a key tool for studying the evolution of land, agrarian structures, ownership and tenancy regimes, agricultural land prices, and dynamics of farm concentration and agricultural land artificialization.

- *A broad approach*

The aim is to cover the various land-related sectors (agriculture, forest, rural), in view of promoting a more integrated approach to sustainable land development and natural resource management. This will be implemented through a sequential and/or partnership approach, focussing first on agricultural land and integrating progressively other sectors. If other forest and rural land monitoring initiatives exist, these can be associated at initial stages.

- *An initiative in partnership*

As mentioned, the European Land Observatory will build a framework to engage the different national and international organizations and networks engaged in monitoring. This will ensure the Observatory's activities to complement and enhance existing data collection, analyses, and publication efforts. It will also allow to share knowledge and best practices about farm, forest and rural land policies (ex: land banking, pre-emption right, etc.). This will help build an understanding of land issues and foster cooperative solutions.

Its operations will be coordinated with the work of relevant European Commission directorates, notably Eurostat and DG AGRI, as well as national statistical offices and national/regional land observatories. Data compiled by the European Agricultural Land Observatory will complement those of the Rural Observatory and the European Soil Observatory.

Box: The Rural Observatory and the European Soil Observatory

The Rural Observatory, established in January 2023 by the European Commission, is a "living platform" managed by the Joint Research Centre (JRC). It compiles various data (population density, average distance to health facilities, broadband speed, etc.) and regularly publishes "notes" and "trends."

The European Soil Observatory (EUSO) is also a JRC tool that collects information on soil conditions and degradation processes using harmonized EU-wide data. This observatory assesses the EU's progress in soil management and contributes to the development of new directives.

To avoid redundancy and maximize synergies, a MoU/partnership/convention could be established between the European Land Observatory, the European Soil Observatory, and the Rural Observatory. This collaboration will clarify the respective roles and areas of intervention of these entities. To achieve these objectives, a first phase of consultations and preliminary studies leading to the creation of the European Land Observatory will be conducted. This phase will adopt an inclusive multi-stakeholder approach involving various actors engaged in land issues to define the roadmap for establishing the European Land Observatory.

Preliminary Activities for the Creation of the European Land Observatory

The creation of the European Land Observatory requires the implementation of a series of preparatory activities coordinated by a consortium of national and international actors specializing in land issues. These preparatory activities will include organizing strategic meetings, conducting feasibility studies, hosting collaborative workshops to define land indicators, and obtaining multi-stakeholder validation of the project. These initiatives aim to establish a solid and inclusive framework for the Observatory's operation through the following activities:

- Baseline survey of existing tools and strategies at EU level, mapping present activities, initiatives, indicators, etc. This will be necessary to better understand what exists, challenges and shortcomings.
- Strategy development meetings: Organize meetings to develop a strategy for creating the European Land Observatory. These meetings will include initiative supporters, such as officials from European institutions, agencies, and directorates (DG AGRI, FISMA, Eurostat, JRC, etc.), the Rural Observatory, the European Soil

Observatory, members of the European Parliament and Member States involved in land issues, officials from Member States' land administrations, civil society organizations, the FAO, national research centres, AEIAR, etc.

- Feasibility study: Conduct a feasibility study for creating the European Land Observatory to evaluate the practical aspects and potential challenges of its establishment.
- Workshops for defining land indicators: Organize workshops to define land indicators with stakeholder participation, including representatives from European institutions, agencies, and directorates (DG AGRI, FISMA, Eurostat, JRC, etc.), the Rural Observatory, the European Soil Observatory, members of the European Parliament and Member States involved in land issues, officials from Member States' land administrations, civil society organizations, the FAO, national research centres, AEIAR, etc.
- Multi-stakeholder validation: Obtain multi-stakeholder validation for the European Land Observatory project, ensuring broad support and alignment among all involved actors.
- Roadmap definition: Define a roadmap for creating the European Land Observatory, including institutional setup, governance modalities, operational framework, and technical framework.

This first phase will last 18 months and will be led by a consortium potentially including, among others, i) the FAO, coordinator of the Global Land Observatory; ii) the SAFER Group, which conducts advanced work on these issues in France; iii) representatives from the AEIAR Network; iv) the European Commission.

References

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