



Collection of strategic planning of advisory services

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Executive Summary

There are a diverse range of advisory services available to new entrant farmers across Europe. Advisory services for farmers are more easily accessible in some countries over others. Good advice is critical for any new business and advisory services play an important role in transferring knowledge and information to new entrant farmers.

In some countries advisory services are (semi-)public provided, while other countries are dominated by private advisory services. Private advisory services include private advisors whose business model is mainly focussing on advice for entrepreneurs in the agricultural sector. The private advisory services also include businesses that are combining the sale of their products with advice for the farmer who buys the product.

Previous studies on advisory services show effective advisory services have a positive impact on performance in the agricultural sector. These results can be seen in an increase in profit, adoption of innovative techniques and the ability for the farmer to gain access to knowledge.

Many challenges occur for new entrant farmers throughout Europe. Effective advisory services can help new entrants to overcome some of these challenges. As demonstrated in this report countries have different new entrant programmes to help overcome these challenges.

1. Newbie partner countries' reports

1.1 Ireland

Introduction

Formal agricultural advisory services in Ireland began in 1899. The focus was on technical instruction to improve farming methods. Advisors known as "itinerant instructors" used the extensive rail network of the time and bicycles to travel throughout the country to meet farmers individually and in groups. Around this time committees called "County Committees of Agriculture" were established to decide on the regional agricultural advisory priorities and to give direction to the advisors who would implement the advisory plan. This structure remained in place until the formation of An Chomhairle Oilíúna Talmhaíochta (ACOT) in 1979. The main function of ACOT as a national agency was to provide training and advisory services in agriculture. In 1988, ACOT and An Foras Taluntais (AFT) were merged to form Teagasc. This merger brought all agricultural advisory, education and research under one organisation. Teagasc has continued in his role up to the present day and has national responsibility for agricultural and economic research, knowledge transfer and agricultural education.

Teagasc

Supported by a network of 180 local advisors, the Teagasc advisory service provides advice on technical efficiency and profitability in all farm based enterprises including forestry and horticulture. This service is delivered through public events, one-to-one consultations, on-farm visits and a national network of farmer discussion groups. While the core work of Teagasc advisory and education services are targeted at the main commercial farm enterprises including dairy, beef, sheep and tillage, the organisation has a long history of providing advice and short courses on artisan food production and agri-tourism. The current course offered to new entrants on an annual basis is the "Options" course. This course aims to inspire existing farmers and new entrants to explore the possibility of starting a new farm based enterprise. It also provides a networking opportunity for prospective new entrants with other new entrants and industry experts. The course is run in the evening over 2 weeks and involves interaction with industry experts along with guest speakers. The guest speakers are farmers and new entrants who have already successfully started a new commercially viable farm based enterprise. This course is run by a dedicated localised advisor and supported by a specialist advisor in rural development along with the rural development research unit based in Athenry, County Galway. Linking with the research where there is also technical expertise and advice available to farmers who want to start an on-farm food processing business. This helps new entrants to perfect the products and also make recommendations on the essential equipment required as well as the specification of the equipment required. The course also provides guidance on the development of a robust business plan for the proposed enterprise.

In recent years, Teagasc has run localised courses and provided advisory support to new entrants to dairy farming. These courses are targeted at young farmers who are either converting a family farm to dairy or new entrants who will access land through a collaborative farming business structures such as partnerships or share farming. Teagasc provides extensive advice on the use of collaborative farming business structures that are critical to enable new entrants to overcome the challenge of gaining access to land. This service is delivered through a network of all Teagasc agricultural advisors

and educators supported by the Department of Agriculture, Food and the Marine and the Revenue Commissioners. Teagasc have also reached out to other rural professionals such as private agricultural consultants, solicitors and accountants by providing Continuous Professional Development (CPD) training to these stakeholders. The aim is to maximise the network of sources that can provide advice and information to farmers on collaborative farming business models.

Private Agricultural Consultants

With the advent of Common Agricultural Policy (CAP) schemes and an increase in the number of third level places available to study agricultural science, there has been an increase in the number of private Agricultural Consultants who deliver advisory services to farmers. For the most part, private agricultural consultants focus their business model on the provision of advice on how to maximise financial benefits through participation in various CAP schemes. These schemes include; The Basic Payment Scheme, Environmental schemes and on-farm capital investment schemes funded by both Pillar I and Pillar II of the CAP. A number of private agricultural consultants also offer additional services such as: financial and business planning; taxation planning and farm buildings planning.

Department of Agriculture, Food the Marine

The Department of Agriculture, Food the Marine is the main statutory body responsible for the development and regulation of the agricultural sector in Ireland. It comprises of many dedicated sub-sections that have responsibility for specific tasks. For example, the Economic Planning & Policy Section engages with industry stakeholders such as the Dept. of Finance and Teagasc Farm Management team to develop farm business and taxation policy in line with National and European regulations. In line with the current CAP the DAFM introduced a number of policy schemes to support new entrants to farming in Ireland. This enables other agencies to provide support to new entrants to a number of schemes. In recent years these schemes have included the following:

- Targeted Agricultural Modernisation Scheme (TAMS II)
 - This farmer capital investment scheme provides grant aid of 60% to young farmers between the ages of 18 and 40 years and 40% to farmers greater than 40 years. This can be used for construction, acquisition including leasing or improvement of immovable property and the purchase or lease purchase of new machinery and equipment up to the market value of the asset.
- National Reserve
 - Since 2015 this schemes has encouraged educated young farmers and new entrants into the agriculture industry. The scheme provides financial support to two categories, 'Young Farmers' and 'New Entrants'.
- Young Farmers Scheme
 - An eligible young farmer receives a payment under the Young Farmers Scheme for a maximum period of five years based on the year of setting up the holding in his/her own name.
- The Succession Farm Partnership Scheme
 - Tax incentives were provided if both farmer and successor enter into an approved partnership, culminating in the transfer of at least 80% of the farm assets to the successor. The scheme is incentivised by offering an annual tax credit worth up to €5,000 for a five-year period.

- Collaborative Farming Grant Scheme
 - The scheme was introduced to allow farmers to engage a number of experts in drawing up a farm partnership to cover service costs, including legal, advisory and financial services.

Banking Sector

Most mainstream banks in Ireland have a team of accredited agricultural experts to support farmers in growing their farm business. These teams support new entrants by providing finance based on a sound business plan. The plan must clearly show that the new farm based enterprise is commercially viable and ultimately can create enough income for the individual and to repay the loan. They also provide farm financial and technical analysis. Most banks offer 'young farmer and new entrant packages'.

Leader

Leader is a government initiative under the auspices of the Department of Rural and Community Development. It has a fund of €250 million that is available to local action groups or partnerships. These local action groups provide advice and guidance on start-up farm based businesses and other rural businesses. They require new entrants to have a sound business idea supported by a financial business plan in order to get funding to get the project off the ground. One such example is an organisation called SECAD who provide advice and funding for viable tourism business ventures in the south of the country.

Rural Development Agencies

Many rural development organisations are funded by Pillar II of the CAP and provide networking opportunities and advice to new entrants who are considering starting a new farm based business. These organisations also provide capital grants funded by the EU to help develop the infrastructure required by the business.

National Rural Network

The National Rural Network (NRN) is a consortium of rural development stakeholders funded by the National Rural Development Plan 2014-2020. It aims to provide a membership network for farmers, agricultural advisors, rural communities and other stakeholders interested in rural development.

Industry/Commercial Entities

A number of industry personnel within the agricultural industry provide support to new entrant farmers on topics that these industry personnel have expertise in. These include agricultural merchants, dairy co-operatives and trade companies. In general these entities employ sales teams and technical staff to assist their customers. They can offer a range of advice on products such as feeds, sprays, equipment etc.

Rural Professionals

Other rural professionals such as Accountants and Solicitors offer support in a number of different ways to new entrant farmers. They offer a number of supports including: taxation advice; business planning; succession planning and legal business structures such as partnerships or Ltd. companies.

Summary

In summary, there is a wide variety of national and regional advisory services through both public and private agencies available to new entrants who want to start a new business venture. The key for new entrants is to inform themselves and seek out the necessary advice and courses to equip themselves to start and run a new business venture. The new business venture must be supported by a business plan that the new entrant has a detailed understanding of and that is robust enough to develop a sound commercial farm based enterprise. The key to success is the motivation level and determination of the new entrant to seek out the advice and help to successfully establish a commercial farm based enterprise.

1.2 The Netherlands

General remarks on the analysis

The study was performed as suggested in the NEWBIE project guidelines. For the description of the advisory services, the Agricultural Knowledge and Innovation System (AKIS) was used as starting point to illustrate the role of advisors.

For listing the relevant advisory services the website of the Association of Agricultural Advisors was consulted next to personal and institutional knowledge of colleagues at Wageningen University & Research (WUR) with knowledge of the topic. This provided additional entries towards specific advisory services focussing on new entrants.

After the digital search some advisory services were contacted via telephone for more in-depth information on the central topics of this report.

The agricultural advisory services in the Netherlands

The first paragraph of this chapter focusses on the institutional background of agricultural innovation in the Netherlands. The Dutch Agricultural Knowledge and Innovation System (AKIS) can be defined as a diversified field of organisations that all contribute in some way or another to the development of new agricultural knowledge and to the exchange and application of agricultural knowledge in the Netherlands (Hermans et al, 2011). The PRO-AKIS project came up with the following diagram (Figure 1) (Caggiano, 2014) in which an overview and the interaction between the main Dutch AKIS actors is provided.

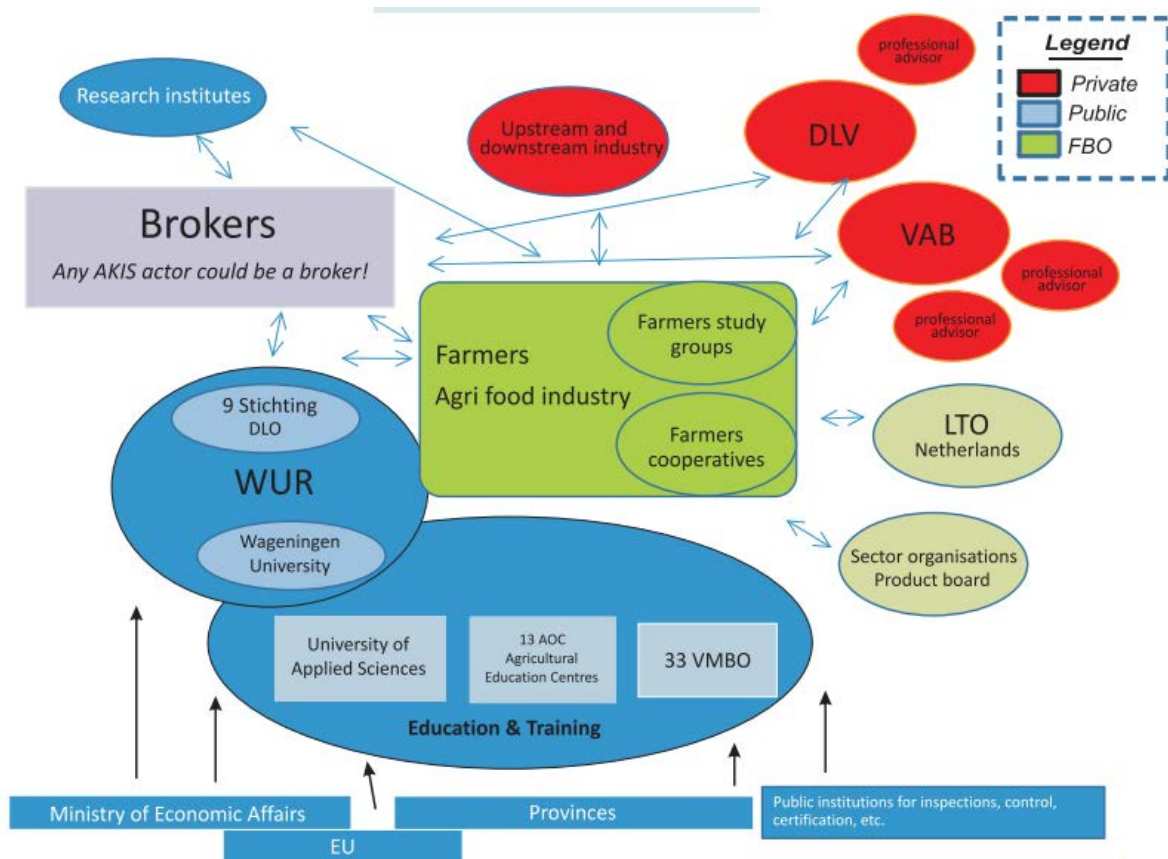


Figure 1: Overview and interaction of the main Dutch AKIS actors (Source: Caggiano, 2014)

The Dutch AKIS experiences a great crossbreeding of functions with respect to the classical roles: the actors traditionally involved in research have started to provide advice services, advisors have taken up applied research, the university started working as a facilitator in innovation processes, etc. This aspect makes it difficult to have a comprehensive and clear profile of the specific role of the players involved (Geerling_Eiff et al., 2014). More information can be found in this [report](#) or on this [poster](#).

In the current situation the advisory services in the Netherlands are private organisations. There are advisory services whose business model is mainly focussing on advice for entrepreneurs in the agricultural sector. Next to these advisory services there are also businesses who are combining the sale of their products with advice for the farmer who buys the product. For example feed companies are offering specialized advice together with their range of feed products they offer.

In the Netherlands there is an Association of Agricultural Advisors (VAB). The association has over 325 members which are all working as agricultural advisor. These members can be affiliated to an advisory service company or can be self-employed.

In table 1 national operating advisory services are listed and whether they focus on successors and/or new entrants in agriculture. This is not a full list of all advisory services in The Netherlands, since there are many regional advisory service company's and self-employed people active. All these organisations or self-employed advisors are privately funded. Educational institutes also take a role in

the market of advising agricultural entrepreneurs. This is embedded in research projects and/or in student work (e.g. student thesis's, consulting courses). They are not listed in the table below.

Table 1: Dutch national operating advisory services and their services towards new entrants

| <i>Advisory services</i> | <i>Focus on successors</i> | <i>Focus on new entrants</i> |
|--|----------------------------|------------------------------|
| ABAB accountants and consultants | X | |
| ABN AMRO Bank | X | |
| Accon Avm consultants and accountants | X | |
| Alfa accountants and consultants | X | |
| Countus accountants and consultants | X | |
| Delphy | X | |
| DLV Advise & Result | X | |
| Flynth consultants and accountants | X | |
| Landgilde | | X |
| Rabobank | X | |
| ZLTO advice (advisory service farmers organisation) | X | |

Besides this national advisory services there are many regional agencies and self-employed advisors. The self-employed advisors often focus on a regional market or specific farming business model. There are some self-employed advisors who focusses on diversified business models and new entrants.

The strategy of advisory organisations towards new entrants

In this chapter we describe the business model of Landgilde which is the leading organisation for connecting farmers with possible successors in the organic agriculture in the Netherlands.

Landgilde (<http://landgilde.nl/home>) was founded in 2013 by Andre Vollebregt and Joost van Strien and has no legal form. Landgilde is a brokering organisation between advisors and farmers with the goal to support succession of farms. Landgilde wants to create a practical network for farm succession by bringing potential successors and farmers together and support them on themes like knowledge, financing, fundraising, legislation, land management, training and supervision.

Landgilde focuses on (biodynamic) organic farms and multifunctional farms that have a sustainable way of working. Conventional farmers are forwarded to the NAJK (Dutch Young Farmers' Cooperative). There is a lot of contact with AERES Warmonderhof (educational institute) and contact is also being sought with AERES Dronten (educational institute). There is also contact with the Farming Systems Ecology group of Wageningen University and Research. There is cooperation with other farmers in biodynamic organic associations, Biohuis and Ekoland. Landgilde also gives guest lectures at AERES Warmonderhof.

On their website Landgilde has created a supply and demand area where people can place vacancy texts for successors but also for employees or internships. In addition to the website, there is a protocol/questionnaire for people who want to step into a farm succession. Both the future successors and the current farmers are interviewed separately and together (total of 5 interviews). Landgilde guides about 10 farm successions per year. There are two people from Landgilde in the lead during the interviews. In addition, there is a network of accountants, notaries, consultants etc. connected to

Landgilde. From this network people can be supported for different types of advice (technical, financial, legal).

Landgilde does not have funding from third parties. Farmers can get a free intake. Because it's very time consuming to do this intakes Landgilde has created a group working method in which 12 possible successors working in one group with 5 meetings. Within these training and consultations there is attention for both the (young) successors and (old) farmers. Landgilde often support the difficult cases (company without a sound business model) who cannot find a successor. Farms with a good business model rarely ask for support of Landgilde.

A current development within Landgilde is to start with a real starter farms. Landgilde wants to develop this farm in the province of Gelderland as part of the European EIP-AGRI operational group 'Land in connection': <https://ec.europa.eu/eip/agriculture/en/find-connect/projects/land-verbinding>.

1.3 Germany

The diversity as well as the federal structure of Germany with its 16 federal states results in a heterogeneous set of advisory services throughout the country. While in some federal states advisory services are (semi-)public, like Chambers of Agriculture, other federal states are dominated by private advisory services. This report gives insights into existing public and private support measures of advisory services for new entrants into farming. Firstly, five publicly funded support schemes of advisory services are introduced before presenting some semi-public and private support concepts for new entrants.

Publicly funded advisory services

Publicly funded support schemes of advisory services for new entrants in Germany include an offer of the Newbie project partner BDL (Bund der deutschen Landjugend; German Federation of Rural Youth), the programme "access to land", the Erasmus+ project LEAN, and from the German Rural Women's Association.

The German Federation of Rural Youth, BDL, offers advisory services for new agricultural entrepreneurs and start-ups. They offer webinars for new entrepreneurship in the green economy and bio-economy sector free of charge. This is a new development as the first webinar took place in February 2019 dealing with the writing of business plans (BDL, 2019). Further materials are only made available for background information. They are making use of experts in this field, for example staff from the Chamber of Agriculture North Rhine-Westphalia with a background in business management. The first course attracted around 40 active participants, so that it can be stated that the demand for this kind of web-based support and advice is present. Further webinar courses are in the planning stage.

The national programme "Zugang zu Land: Chancen für neue Betriebe eröffnen" (Access to land: Open up opportunities for new farm businesses) results from the request of the German parliament Deutscher Bundestag to build up a support landscape for non-family succession in farming. This request has been taken up by the government by providing a budget of 5 million € for advisory

services and coaching measures targeting farm start-ups and newcomers as well as established farmers looking for successors outside the family (GÖRING-ECKARDT and HOFREITER, 2017).

The EU-funded and international Erasmus+ project “LEAN: Learning on Entrepreneurship and Agriculture for New farmers” is running from 2018 to 2020. The partners are Vertigo Lab from France, Institut für ländliche Strukturforschung (Germany), Vet Agro Sup (France), ARID (Poland) and BETI, the Baltic Education Technology Institute, from Lithuania (INSTITUT FÜR LÄNDLICHE STRUKTURENTWICKLUNG, 2018a; 2018b). The project aims “to provide high quality learning opportunities on agro-ecological and organic agriculture, entrepreneurial skills, and concrete examples of good practices and “success stories” from European farmers. Targeting young and new farmers, the training programme will be designed according to a capacity building approach based on relevant, customized, innovative and easily accessible tools that can be mobilized by organizations of agricultural training.” (BETI, 2019) The objectives are:

- “to build a strong and efficient partnership of 6 participating organizations across 5 European countries with an outreach to all European countries to foster capacity building in agronomic knowledge and entrepreneurial skills;
- to assess the training needs of new and young farmers to develop agro-ecological and organic agriculture in the 5 selected countries;
- to build an online Open Educational Resources (OER) training programme for agro ecological and organic agronomic knowledge and entrepreneurial skills based on high quality training resources including videos, case studies, good practices exchanges;
- to provide an advanced high quality learning opportunity for European farmers to implement and develop their farm according to agro ecological and organic principles; and
- to promote exchange between learners, between learners and teachers and between learners and accomplished farmers (from the case studies) both at the regional level but also between countries using innovative ICT tools” (BETI, 2019).

The German Rural Women's Association supports women in establishing own businesses on the agricultural sector. Within the two project years 2019 and 2020, the association aims to build up a targeted advisory service for women. The aim is to teach key players in the federal states, who are then able to transport the information and skills into the regional and local levels (DEUTSCHER LANDFRAUENVERBAND, o.J).

Semi-public advisory services

The Chambers of Agriculture (present in the federal states of North-Western Germany: Schleswig-Holstein, Niedersachsen, Hamburg, Bremen, Nordrhein-Westfalen, Rheinland-Pfalz, and Saarland) offer a wide range of services for new entrants into farming. These services include presentations, workshops, visits of successful farms, etc. Within the federal state of Nordrhein-Westfalen (North Rhine-Westphalia) there are advisory services like crash courses as well as longer lasting courses for new entrants, farm diversification workshops and seminars, etc. (LANDWIRTSCHAFTSKAMMER NRW, 2016; 2019a; 2019b). The Chambers of Agriculture from other federal states are offering similar courses.

Furthermore, the Chambers of Agriculture offer contact persons to approach when taking over a farm or starting a new farm business (GRÜNDKEN and COURTH, 2018).

Private advisory services

The German Agricultural Association (Deutsche Landwirtschaftsgesellschaft, DLG e.V.) offers two training courses for interested new entrants (DLG, 2019a; 2019b). The one-day course is a practice-oriented, applied module for newcomers into farming. The following contents and foci are individually aligned to the participants' demands and requirements: farm visits, applications for agricultural machinery, knowledge on natural conditions for farming activities (soil, water, weather, climate, etc.), plant identification, operating materials, etc. The courses include discussions, group work, training, farm visits, etc. Target audience are people without a background in farming practices. The course costs 500 € (DLG, 2019a). Another course of two days includes besides the contents of the one-day course also agricultural and rural development policy, livestock breeding, and business management. This course costs 1,170 € (DLG, 2019b).

Eight organisations have established the platform „access to land“ looking for ways to step into farming by building communities able to buy or rent land. In 2018 the platform organized four workshops with the head topics farm succession, access to land, cooperative business models, and rural development (ACCESS TO LAND, 2019)

The landscape maintenance association „Landschaftspflegeverband Thüringer Wald“ offered a course for farmers until 2017. This course had a focus on mountain pasture practices as well as on developing new revenue streams and business fields outside primary production. One of the aims was to show farmers diversification options when being situated in touristic mountain areas. This course included also a two-week course abroad in the Austrian Alps (LANDSCHAFTSPFLEGEVERBAND THÜRINGER WALD, 2017).

1.4 France

A structuring system is formalized

Since the 1960s, France has a public system to support the arrival of new farmers, essentially through the Ministry of Agriculture, mostly geared towards existing farms modernization in order to transmit them to younger farmers.

The system is available throughout the entire territory of France (metropolitan and overseas territories), with departmental adjustments, but the structure is the same as well as the references (technical, economical, ideological). This system is jointly run by the government and by the professional agricultural organisations, linked to the majority agricultural union: it is co-managed from the conception to the implementation; the government devolves some of his duties to professional organizations or even straightaway to agricultural unions.

It is also strongly supported by EU Funds whose the Ministry of Agriculture is responsible for.

Nowadays, it is organized around the idea of single windows available in each departmental territory, which is able to meet each agricultural project leader, to inform them, to orientate them, encourage them or discourage them. The single window (« Point Accueil Installation Transmission », Installation Information Point) is thought to be the compulsory access, financed by public authorities in order to

guarantee a mission of general interest and free of charge for the agricultural project leaders. In most of the departments, the Chambers of Agriculture ensure those missions of welcoming and support.

The Installation Information Point

It is the single window for all project leaders, regardless of their situation or their project. Its missions are to inform them about the installation path, the existing accompaniments and funds and to help them to formalize a pre-project based on a [self-diagnosis](#). Depending on the project maturity, they are oriented to the EC PPP in order to deepen their project.

The Elaboration Centers of Personalized Professionalization Plan (EC PPP)

They are Labeled Establishments able to accompany agricultural project leaders in the elaboration and the realization of their Personalized Professionalization Plan (PPP).

The PPP is a training program adapted to the project, the goal of which is to acquire competencies and skills identified as missing.

The project leader develops this action plan with the support of a project advisor (he analyses the project on a human and economic basis) and a competencies advisor (he analyses the training needs).

The project leader has 3 years to realize the actions planned in the PPP. Trainings are free of charge for the project leader under a certain limit.

The 21 hours training is the only compulsory training included in the PPP. It is group sessions where administrative procedures, integration in the territory, institutional and agricultural professional landscape, the available funds etc. are discussed...

Simultaneously, the project leader realizes his [business plan](#) with the support of the EC PPP advisor. It is the synthesis of the feasibility study and a required document to benefit from installation funds.

Besides the age and training requirements, the PPP and Business plan realization opens up the possibility to benefit from installation funds.

But in facts, the project leaders have other interlocutors. Around this institutional route, the field of accompaniment has progressively been enriched by the presence of other public and private actors.

The emergence of local agricultural policies

Where is it from?

The couple of actors Ministry of Agriculture/Agricultural professional organizations has now to work with the regional councils and local authorities, who may have their own agricultural policies, adapted to their context: welcoming working people in rural areas, preservation of open landscapes, local products supplying, resource conservation...

What do they propose?

They developed specific funds and ways to support projects which are in line with their policy. For example, the Rhône-Alpes Regional Council has long had a policy in favour of innovating rural businesses with funds, helping advisors services and accompaniment as well as dedicated structures: the neighbourhood sites. Those new public actors have their own budgets and the possibility to orientate European funds.

Multiple supports coming from agricultural and citizen associations

Where is it from?

Associations, set up on the initiative of farmers or citizens, developed forms of support with the intent of lifting constraints on installation (land access), developing commercialization forms (hampers network), promoting techniques and production modes (organic agriculture) or even allowing to develop farmers competencies (accounting, self-constructing).

What do they propose?

Support proposals are designed to enrich the installation path (certain training are included in the PPP) and continue after the business creation.

The public is mostly new entrants.

Examples of supports coordinated with the installation path:

- Café Installation: friendly meetings around a theme of project leaders, farmers and installation actors.
- Training « From the idea to the project »: collective training for several days aimed at future installation candidates in order to help them establish an installation project from their desires and what they imagine their project will be.
- Tutors network: support contract between a farmer tutor and a project leader in the process of being installed.
- Farm incubators: facilities allowing project leaders to test their project in life-size conditions, independently while limiting the risk-taking.

Examples of thematic supports:

- Access to Land: searching and support to property access (SAFER which is the Land Use and Rural Settlement Corporation; Terre de Liens, which is an association buying lands and farms to install farmers)
- Access to capital: Cigales, ADIE (Association for the right to Economic Initiative)
- Access to market: Food basket network (AMAP, Associations supporting small farming), collective selling points (CIVAM Network, Peasant shops network)
- Technical support: accounting, general management (AFOCG), organic agriculture (FNAB, Nature et Progrès...), farm equipment self-construction (L'Atelier Paysan, farmer workshop...), collective food processing projects (CIVAM, ADEAR...)

New private actors are investing the field of business creation and development support

Where is it from?

Recently, we have seen the emerging of new private actors involved in the support of project leaders to promote new forms of entrepreneurship (micro-farms) or producing (permaculture, aquaponics).

They clearly aim at a public with no agricultural background, which is often changing careers.

What do they propose?

They essentially propose collective training, application in farms through traineeship or volunteering

(woofing) or even individual accompaniment (coaching).

They animate existing farms networks which develop training and support provisions.

Supports according to the initial situation of the project leader

Lastly, the « future » farmers benefit from competent counselling depending on their starting position:

- When they are unemployed, there is the public employment service: local missions for youth employment, « Pôle Emploi ». There are advisors, training aids can be mobilized;
- When they are young, there are the youth information services: youth info-point, youth information centre;
- When they are in a state of poverty or of social exclusion, social inclusion services are sometimes able to support and lead them in developing projects;
- When they want to settle a farm in a rural territory with a policy on attractiveness: at that point, they are « new entrants » and are able to be supported by institutions in charge of attractiveness.

Alternative approaches of support

A gamble: instead of gambling on the necessity of a single point of contact (it is impossible by definition, regarding the diversity of social situations and of facilities involved in welcoming new entrants), certain actors take the gamble of multiplying the entrances and the possible points of contact, if they are trying to coordinate and articulate their actions: the more existing ways to come in agriculture, the more possibilities to reach, to meet, to welcome people from different backgrounds, situations, with various projects. And therefore, the more potential agricultural new installations, vitality, resources. It is a gamble confirmed by more than 30 years of experiments on fields.

An observation: furthermore, we can spot those installation paths, which will ultimately lead to activities or businesses creation but also take-over of existing businesses, which are long-term, go through successive stages (and sometimes layered) that need various support resources, methods, and have to complement each other. It is a question of tortuous paths and the answers have to be plural.

That gamble and that observation lead to identify multiple multi-actors support processes (MASP), of local and regional ambition, often initiated by association and/or cooperatives, which have contracted with the government and/or the local authorities in order to offer free or almost-free actions for agricultural project leaders.

1.5 Slovenia

Introduction – a short overview of agricultural advisory services

The structure of the institutions that form AKIS (Agricultural Knowledge and Information System) in Slovenia is diverse. In general, they can be classified into six groups according to their mission and contribution to agriculture. The first three groups are comprised of:

- a) the public sector with the Ministry for Agriculture and affiliated bodies,
- b) 18 research and education institutions and
- c) a group of public institutions that provide public services.

Additionally, three groups are private interest-driven institutions that consists of:

- a) farmer-based organisations,
- b) private advisory organisations, and companies and
- c) NGOs.

Cooperation and knowledge transfer among AKIS actors is very diverse and it varies from traditionally strong cooperation to more declarative.

In Slovenia, family farms dominate and usually new entrants start their career in farming as family farm successors. Hence, the **advisory services available to new entrants are focused on young farm successors**. One of the key Slovene Farm Advisory Service (FAS) characteristics is **centralisation**. The agricultural advisory service has a network of approx. 380 advisors under the umbrella of **Chamber of Agriculture and Forestry of Slovenia (CAFS) and is well recognised by the farmers**. It is organised within eight territorial Agricultural and Forestry Institutes and 59 local units. CAFs is very accessible to all farmers, especially to small farmers – but is often pointed out that the real advice to farmers is no longer implemented.

As a result of FAS centralisation, private consultancy market is literally undeveloped, although first changes in this sector had been implemented. It is necessary to stress that the public FAS has always had a very important role in Slovenian farms' development. At the same time, there are several content and structural changes that already started or will need to be implemented in greater extent in near future.

The agricultural advisory services available and their role in relation to new entrants

Institutions that forms advisory services within agricultural knowledge and information system (AKIS) in Slovenia can be classified into six groups (Figure 2). The organisations of all six groups operate on national level, some of them also on regional or territorial and local levels.

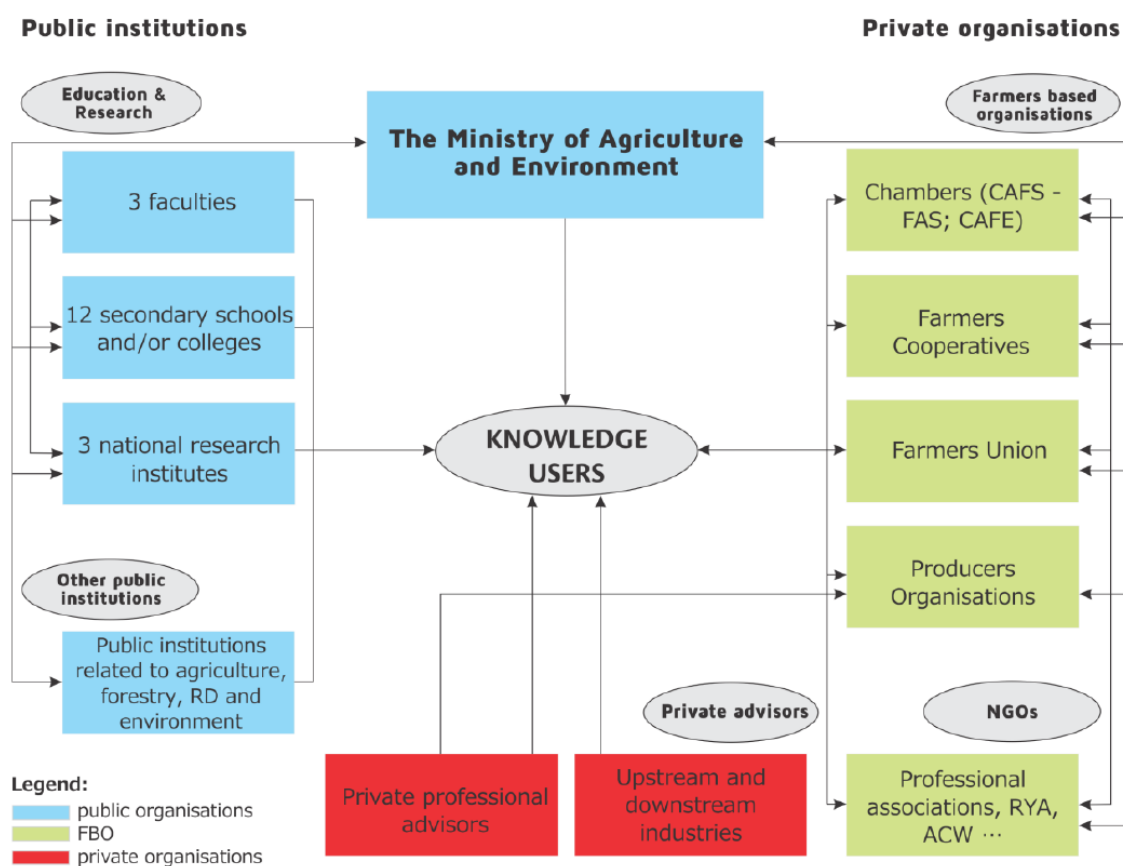


Figure 2: overview of AKIS actors in the Republic of Slovenia

State funded or part funded institutions

State founded Farm advisory system (FAS) in Slovenia is centralised and is organised within national **Chamber of Agriculture and Forestry of Slovenia (CAFS)**. CAFS operates on three levels. The first level is the Chamber's Headquarters in Ljubljana, the second level consists of 8 district subsidiaries established throughout Slovenia and 59 local units operating on a local (third) level. CAFs employs 170 advisors at local level, who knows the needs of the farms very well and can suggest development of business models of the farms, 70 advisors with different type of agriculture specialisation and 40 other advisors who work with young farmers, women in rural areas, etc. Such divided organisation structure provides accessible service in every part of the country. Core tasks of FAS are defined in Agriculture Act and Chamber of Agriculture and Forestry Act (OJ RS No. 41/99 and 25/04) and are further defined in detail in the annual Programme of Activities and in the financial plan. FAS is funded from different sources according to annual plan of service agreed by the government. Nevertheless, the majority of funds are provided from national funds (65-70%, 2018), though its share and the total amount for public service is gradually lowering down. FAS staff and employees in public sector that provide public service in agriculture and forestry are already partly involved in providing other services (preparing business plans for farms and project applications, filling up the subsidy forms, etc.) and work on different projects founded by different sources. In subsequent years this will become even more important.

There are also some **other public institutions** that contribute to agriculture knowledge and information exchange such as: public institutions officially responsible for public service on rural development, forestry, nature preservation (e.g. national parks) and regional and regional/local institutions involved in rural development, and other issues important for the development of their territory (e.g. local development agencies, LAGs) with pilot projects in agriculture. The situation differs from region to region.

Privately funded advisory services

There are very few private companies and private consultants that provide support to farmers on basic agriculture and forestry issues, as the market for this type of services is centralised under national institutions, namely CAFS. However, the consultancy support to the organisation and management of producers groups, marketing, etc. is established. Moreover, some **entrepreneurs** who serve farmers with different machineries and equipment provide some advisory service to new entrants.

Among **farmer based organisation**, there are two agriculture chambers: **CAFS and Chamber of Agricultural and Food Enterprises**. The first one represents farmers and forest owners and the second one represents companies and entrepreneurs in the business of production and processing of agricultural and food products. The latter has already transformed into a voluntary association though membership for farmers and forest owners in CAFS is still obligatory. The second group of farmer-based organisations, based on voluntary membership, consists of: **Cooperative Association of Slovenia**, territorial or local cooperatives, and **Farmers' union**.

Among non-governmental organisations, there are two traditional groups: **Association of Slovene Rural Youth** with 52 local associations and **Association of Country Women** with 80 local associations. In addition to above mentioned, there are also professional associations, NGOs that focus on environmental issues, etc. NGOs organise different seminars, excursions, events, and round tables, but in general they are non-commercial organisations.

Research and education institutions

There are 15 educational institutions on the field of agriculture in Slovenia; three faculties operate within two universities (Biotechnical Faculty and Veterinarian Faculty within the University of Ljubljana, Faculty of Agriculture and Life Sciences, University of Maribor), other 12 institutions are secondary schools and/or colleges. Faculties operate on national level and later on regional or territorial level. Key national research institutes are Agricultural Institute of Slovenia with two experimental centres, Slovenian Forestry Institute and Slovenian Institute of Hop Research and Brewing.

Strategy for new entrants of advisory organisations

CAFS performs public farm advisory service (FAS) as well as several other activities for young farmers: the annual prize for the innovative young farmer in cooperation with the Association of Slovene Rural Youth, technical advices, national professional qualification trainings, special training circles, information on land lease, workshops on diminishing the risks in agriculture, advice on social entrepreneurship, etc. One of the FAS priority tasks focused on new entrants are implementation of **Action plan for work with young farmers 2016-2020** in collaboration with Ministry of Agriculture, Forestry and Food and Slovenian Rural Youth Association as well as **implementation of CAP** (media

support about tenders for new entrants, helping farmers with application, etc.). The setting up of young farmers (aged from 18 to 40 years) has been a part of the Rural Development Programme (RDP 2007–2013, 2014–2020) and addressing the young farmers with intention to take over and manage the family farm. The main objective of the adaptable policy measure was improving the age- and educational structure on farms and speeding up the transfer of the farms onto the successors. In the period 2007–2017, 3400 applicants were granted 145 million euro altogether, mostly in the cohort 30-40 years, male farmers prevailed, practising mostly stock-breeding, mixed vegetation-animal husbandry and winegrowing. In average, the farmer was granted with 45,000 EUR and receive further bonus at applications for different funds and tenders. According to their business plan, they mostly invest funds into the purchase of ICT, new farm mechanization, to upgrade their production capacities, and to purchase new or second-hand specialised farm machinery (areas with higher inclination). This is relatively successful model to support young family successors. From the **FAS new entrants mainly receive information and advice on the establishment of new business models, but they cannot sufficiently advice on modes of entry to farming.**

In the year 2018, a special initiative provided by **the Association of Slovene Rural Youth** in cooperation with Ministry of Agriculture, Forestry and Food was undertaken supporting the meetings of young farmers in different locations throughout the Slovenia (22 municipalities out of 212 organized meetings) where young farmers presented their aspects on challenges and opportunities of Slovene agriculture and rural areas.

1.6 Bulgaria

Short overview of advisory services in Bulgaria

In Bulgaria there is not an official terminology of new entrants into farming yet and not specific services targeted only new entrants and their business models. However there is public funded support deliver by the National Agricultural Advisory Service to young farmers who started their farms 18 months ago to develop their business plan and projects for investment, equipment, marketing and potentially innovation. Agro-business incubators and business centers were established in the country in 2001 to deliver complex services (trainings, mentoring, business plan development and its implementation and micro-financing) to start and develop farms by state funding up to 2009. Now BIs and BCs are self-financing and they deliver paid services or funded by projects services. To enter and develop organic farming model farmers, including new entrants could use the services provided by Bioselena Fondation or private service.

Available Agricultural Advisory Services in BG and their role and strategy in relation to new entrants

Public/ state funded Agricultural Advisory Services

The National Agricultural Advisory Service/NAAS/ <https://www.naas.government.bg/>

NAAS provides farmers updated information, specialized counseling, and expert assistance for implementation of efficient and competitive agriculture to meet EU standards. Advisory services:

- Extension assistance to farmers, cooperatives and associations and free of charge advices, information, training and Land management
- Assists transfer of scientific and practical knowledge and innovation into agricultural practice
- Paid chemical analyses of soil, plants and forages, irrigation water and fertilizers and recommendations (production, business diversification and planning, and renewable energy)
- Training in management and good agricultural and environmental condition (cross compliance, farm management and plant and livestock production; agri-environment)
- Business plan and project development for small farms (investments, processing and marketing of agricultural products and diversification with non-agricultural activities) and young farmers

National Plant Protection Services

<http://www.mzh.government.bg/bg/sektori/rastenievadstvo/fitosanitarni-vprosi/>

The National Plant Protection Service is an institution to the Ministry of Agriculture and Food with a headquarters center, 14 regional offices, Central Laboratories of Plant Quarantine, and Chemical Testing and Control and the Institute of Plant Protection. It applies the scientific potential in technology and the methods of pest risk analysis and protection. Main services provided to farmers:

- Consultancy for Plant Protection
- Newsletters and tools for occurrence, distribution and implementation of pest combat
- Training and supervision of farmers for the requirements of "good plant protection practice" in crops and monitoring programs for implementation of good agricultural practice

Local Action Groups

105 approved Local Action Groups in Bulgaria applies community–led local development (previous LEADER) by implementing their strategies for sustainable rural development. Farmers are among the main target groups and they have opportunity to receive updated information, consultancy for appropriate interventions of the strategy in farms, specialized trainings and advices for business planning and project proposal writing for agricultural investments and services (establishment and development of new farms of young farmers, diversification of product and services, marketing).

Partly state or donor funded non-for profit organizations

A network (the National Business Development Network -NBDN <http://www.nbdn-bg.org/>) of **42 business centers and business incubators** established under the national JOBS project (2001-2009), with Governmental support, the United Nations Development Program and the local municipalities, work in rural areas with focus on local agricultural support and service delivering. The BIs and BCs deliver a complex of services to potential farmers and new entrants such as information, vocational agricultural and economic trainings, start your own business training, mentoring, marketing support, business planning and used to run a micro-financing scheme for equipment in 2001-2010, now help the access to capital. Business incubator – Gotse Delchev www.bi-gd.org is one of the most active and innovative among them. For almost a decade there is no state support to business incubators and centers, they are self-financed and must be self-sustainable and develop and implement variety of

projects, deliver paid trainings and services, work as sub-contractors or provide expertise to other organizations. Unfortunately, some of the centers have not survived.

Bioselena Foundation established with Swiss support deliver advisory services in agro-ecology, organic plant production, livestock breeding, processing and direct sales, transition to organic production, technology development and innovative production techniques, vocational training.

Private Advisory Services

Usually private companies in Bulgaria are specialized in delivering consultancy in preparation and elaboration of project proposals for farmers and business planning under the European and National public funding. Some of them deliver legal and accounting services as well. There are only few private companies which provide advisory services in agriculture such as soil, vegetables, greenhouses, crops, strawberries, wheat, grain, fruits, plant protection etc. (<https://ensibg.com/>) and advisory services in agriculture, processing and food industry, marketing research and analysis, business and financial planning, technology and project management (<http://new.abkconsult.com/>).

Education Institutes / Universities

Agricultural Academy <https://www.agriacad.bg>

The Academy has 26 Research Institutes and 16 Test Fields. Some examples:

- Institute of Agricultural Economics, Sofia <http://www.iae-bg.com/en/> delivers advisory services in Agricultural Risk Management, Agricultural Innovation Management, E-governance in Agriculture, Develops programs, strategies, methodologies, business and investment projects, Assesses technology, farmland, and tangible fixed assets.
- National centre for scientific, applied science and servicing activities in the field of soil science, hydro-melioration, mechanization of agriculture and plant protection. (INSTITUTE OF SOIL SCIENCE AND AGROECOLOGY www.issapp.org) delivers methodological, technical and consultancy assistance to farmers, prepares agri-environmental plans, advises for re-cultivation of unproductive, low-productive, polluted and damaged soils and landscapes; provides technologies for growing basic crops in organic and conventional farming; design of complete installations for water-saving and energy-saving irrigation technologies, technologies for utilization of the waste biomass from plant and livestock.
- Institute of Mountain Livestock and Agriculture, Troyan www.rimsa.eu provide research and consultancy activities in the field of livestock, horticulture and forage production in the mountainous and forested areas, develops and implements models for modern agriculture, including organic one, organizes training courses for farmers in various agricultural activities.
- Institute of Roses, Essential and Medical Cultures, Kazanlak provides services in research, introduction, selection and reproduction of essential oil and medical plants, Technology development for essential oil and medical plants, Project development for essential oil and medicinal plants, Science information (books, brochures, technological manuals).

The 16 test fields are specialized in variety of agricultural sectors such as apricot growing, livestock, tobacco, vegetables etc., deliver information and trainings to farmers, technology transfer, developing models for high productivity.

Agro ecological Centre (AEC) at the Agricultural University (AU) of Plovdiv

The AEC farm and its REC (<https://www.au-plovdiv.bg/en/>) are the main units for practical training and teaching of farmers, young agricultural experts, agronomists, local municipalities and students in Agroecology and Plant Protection in organic and sustainable agricultural practices. Services delivered are: Promotion of organic agriculture and the methods for protection of environment and biodiversity Education and training in organic agriculture, agroecology and other environmentally-friendly practices, business plans for conversion to organic farming, farm management and rural development, Development of national and international projects for organic agriculture and assistance in application.

Innovative ways to provide information and advice to new entrants

- On the websites of service providers there is a basic information
- Social media, mostly Facebook and YouTube: interesting information about useful events, innovation, good practices, video sharing
- Short information meetings/workshops are organized by public, NGOs and private organization
- Young Farmer Discussion Groups are usually informal

1.7 Portugal

An overview of agricultural advisory services in Portugal and how they operate within the agricultural sector.

Extension services were based until the 1980s, in the public administration, the local delegation of the Ministry of Agriculture, with a coordination at central level. From the 1990s, corresponding to the first European Community Framework Programme (1989-1993) after Portugal's integration in the EU, the Ministry of Agriculture started the transfer of the public extension services to farmers' organizations. However, there were also multiple new administrative tasks that needed to be completed, in order for farmers to be eligible for the EU support mechanisms. These associations, both small regional associations and the large national ones, progressively dedicated their staff effort to resolve the bureaucratic and administrative requirements, and ended absorbed by these tasks, and the follow up of new requirements and regulations which require constant updating. They have not developed, or have lost, the capacity to provide the technical advice for which they had received public powers, and financing. The financing for the support to be given to farmers does not make explicit it should be on-farm, or on-field, technical support, and the pressure for been able to provide administrative support was strong.

Since 2003, being compulsory in the Member States, the Agricultural and Forestry Advisory System (SAAF – Sistema de Aconselhamento Agrícola e Florestal) was created, consisting of: a) a National Management Authority (General Directorate of Agriculture and Rural Development-DGADR); b) a Monitoring Committee composed of several units of the Ministry of Agriculture (DGADR; Office of Planning and Policy-GPP; Financial Institute of Agriculture and Fisheries-IFAP; Portuguese Agency for the Environment-APA; Directorate-General for Food and Veterinary-DGAV; Institute for Conservation of Nature and Forestry-ICNF); and c) representatives of the entities providing advisory services (farmers organizations recognized by DGADR through a recognition process). In the objectives of the national SAAF, among others, are compliance with conditionality, measures related to more sustainable agricultural practices and the monitoring of young farmers in the implementation of their business plan. However, the support provided is bureaucratic, with major functions related to policy monitoring and evaluation, production of statistical data, support in the development of licensing processes and implementation of policy guidelines at regional and national levels. The functions of agricultural advisory and technical support, which were originally provided by public extension services, are excluded. Some sectors with higher added value related to production have developed efficient advisory services, as the wine sector, but for the majority of farming systems in the Alentejo region, a quality and science-based extension service has disappeared. Given this gap, farmers search for support in upstream entities (cooperatives or private companies that sell production factors) and downstream in the value chain (producer organizations or private companies to whom they sell the products); and they use private consulting offices which, in most cases, are focused on the preparation of the applications for investment projects and for the annual support. Even in case of the projects, the companies do not provide further support after the project approval. For more technical and innovative questions, some farmers look for the support of research units, in some cases with a direct connection with researchers or integrated in projects networks. But researchers, even those producing applied science and interested in connecting to actors in the field, need also to set other priorities, related with scientific outcomes and training/education. The availability of research to advise farmers is thus always limited.

In Portugal, the agricultural advisory services are scarce, and provided by a very diverse set of entities from the public sector, private and non-profit entities, operating with practically no coordination by the State. These organizations work in partial aspects, many functions overlap and the operation of all together does not provide a full service of technical or technical-economic advice. In most cases, these organizations provide a wide variety of administrative tasks, related to grant applications and financial support available through the Common Agricultural Policy (the tasks they dominate) and the consulting services are mostly restricted to training and information transfer. If we specify this type of service to new entrants, at this moment in Portugal no entity has this competence. Furthermore, given this fragmentation, whoever wants to settle in the agricultural sector has strong difficulty in knowing where to go to get quality support and advice.

The agricultural advisory services available and their role in relation to new entrants.

Public agricultural services:

In general, the agricultural services have tended to withdraw technicians from the field and, with the number of technicians currently much lower than in previous years, and only provide advice-related functions very occasionally. At present, the state is not in fact providing advisory services other than

the dissemination of public policies and changes that arise, and its advisory functions are delegated to various farmers' associations and other private organizations (through SAAF) and Local Action Groups (LAG) through LEADER actions.

The current SAAF is under DGADR management which defines the rules and gives guidance to the operation of these services provided by the beneficiaries of the PRD2020 specific measures: Action 2.2 Advisory with two operations: Operation 2.2.1 Support for the supply of agricultural and forestry advisory services; Operation 2.2.2 Support for the creation of Advisory Services; Operation 2.2.3 Support to the Formation of Advisers of the Entities Providing the Advisory Service. The Operation 2.2.1 just started in 2017 and the others just during 2018. In general terms, the impact of SAAF in Portugal has been very small and with little involvement of organizations and farmers.

In the present regulation, only a few selected organizations are eligible and these are in most cases the national federations of agricultural organizations, or large national associations, as the one for organic agriculture. The reasons for this selection are not made public. The consequence is that the regional and local organizations, closer to the farmers, were not allowed to access directly to this support. They may have access, if affiliated in a large federation, through the funds given to this federation. But the process has been bureaucratic and the support has mainly been used to continue providing updated administrative support to the farmers.

The Ministry of agriculture also has sector research centres, spread throughout the country, with specialised research topics in different locations, with connection to the regional farming systems. However, by non-renewal of staff and by merges or enclosure of department services, these research centres and their units, have been under a process of reduction and decay in the research activities, followed by the abandonment, or strong reduction in activities in the experimental farms of the Ministry of Agriculture. In general, it can be said there has not been, since the seventies, a national strategy for agricultural research. The research which is developed is mostly in the Universities and research centres who depend on the Ministry of Science, and are therefore subject to rules applied to science, not subject to the interests of the agricultural sector. There are of course synergies, but not a national organized research program according to predefined strategic priorities and goals. Inside Rural Development Programme (RPD) was created the action Operational Groups, that reactivated the link between this research centres from the State and the universities and farmers companies, promoted by financial support. In the end of 2018 there were 113 Operational Groups approved. Despite the importance of linking research to practice, these projects are limited in time and funding, which limits the continuity of applied research and knowledge transfer.

Farmers' organisations in the agriculture sector:

In Portugal, three major umbrella organizations - Confederation of Portuguese Farmers (CAP), representing large farmers, the National Confederation of Agriculture (CNA), representing small scale farmers, and the National Confederation of Agriculture Cooperatives and Farm Credit Cooperatives (CONFAGRI), representing specialised cooperatives, in different sectors - represent the agricultural sector. The advisory services to which they applied for funds are assigned to them by the DGADR and then carried out by the associated organizations of each one, with regional and local coverage: 98 organizations in CAP, 25 in CNA and 112 in CONFAGRI. There are more 62 organizations partitioned in seven entities that are also recognized by DGADR in SAAF. The support and advice provided to farmers in turn is done in a way very fragmented and little or nothing articulated and, as it was mentioned

before, the local and regional organizations closer to the farmers are not allowed to access directly to the funds, but just through a bigger association. Often this support is linked to fill applications for subsidies and financial support available through the Common Agricultural Policy.

Within the sector organizations, the Association of Young Farmers of Portugal (AJAP) is the one that can be more tuned to support the new entrants in farming. However, the support AJAP provides is also, again, basically administrative support. It is important to mention that the adherence to this National Agricultural and Forestry Advisory System (SAAF) by the young farmers in first installation, with a project approved under the PDR2020, allow them to fulfil the mandatory condition concerning the complementary training, which justifies part of the adhesion to SAAF at national level.

Also technical associations (associations of breeders of pure races, producers of specific crops) have knowledge and practical experience and may provide some general advice on practical management issues, cultural operations, economic results that can be expected, etc. However, they also do not give specific support and advice that a new entrant needs when setting up the agricultural sector, they do not visit the farm nor provide advice tailored to each farm and business model or dedicated knowledge transfer.

Local development associations:

At the rural level, in support of the diversification of activities on the farm holdings and local economy, the Local Development Associations (LDAs) have the function of elaboration and implementation of the local development strategy, which includes the animation of the territory and the monitoring of the projects in the LEADER initiatives, as an intermediate management body. Currently in Portugal there are 58 LDAs organized in a national federation called "Minha Terra". However, in practice they are increasingly limited by bureaucratic tasks, which have been delegated to them by the State, with the task of receiving, analysing and following up applications for LEADER actions. They are with less capacity for animation, to follow-up communities and territory and, thus, not available to provide any technical support or advice to who wants to elaborate a small farm project to start farming.

Private consultancy firms and services:

At the national level there is a wide variety of private consulting firms that also provide support and advice to farmers. Many of these are linked to the agroindustrial and food sectors and production factors, which provide the farmers and together provide the support and consultancy service, eventually to fill the gap left by the state. In addition to these, there are also a large number of private companies that provide advisory services and project preparation. However, these services are also heavily targeted for the development of investment projects supported by the CAP RDP and applications for CAP I Pillar subsidies. These are paid services, the costs of which are provided for in CAP investment and reimbursement plans, and usually end with project approval, with the exception of very specific areas.

Education Institutes/Universities

At the national level, the network of agricultural education establishments is under the public sector and consists of 14 institutions: 6 universities and 8 polytechnics with an offer of undergraduate and postgraduate courses (masters and doctorates). At the same time, it offers other forms of short and medium term training addressed to professionals in the field. In addition to these, there are three

Colleges of Veterinary Medicine. There is also a network of specialized educational institutions in the agricultural area (Professional Schools of Agricultural and Rural Development) that each year prepares qualified professionals to work on farms at technical level.

Universities also do research work in the agriculture sector but do not have the rural extension services and do not have the capacity to help new entrants defining their business models or to develop their projects. However, as said above, researchers and research units are increasingly those contacted by producers in search of technical collaboration and support.

Portuguese strategy for new entrants

The Portuguese National Rural Network (RRN) is a platform for the dissemination and sharing of information, experience and knowledge that brings together the organizations, administrations and other networks involved in rural development, at national and European level, whose promotion is carried out by a multidisciplinary team centralized in the DGADR. RRN is the national partner of the European Innovation Partnership for Agricultural Productivity and Sustainability (EIP-AGRI) and is the Portuguese member of the permanent Innovation Subgroup coordinated by EIP-AGRI and DGAGRI.

At the national level there is a lot of offer of farmer meetings, seminars, workshops, and other group activities promoted by most organizations, as well as by public services, education and research institutions. Organizations like CAP, CONFAGRI, CNA and AJAP also publish magazines with technical and policy related articles, and keep web pages with general information.

However, in general, none of the entities (public or private) provides an effective advice service to a new entrant that is intended to settle in the agricultural sector.

1.8 Belgium

An overview of agricultural advisory services in Belgium and how they operate within the agricultural sector

Administrative questions of starters related to the registration of a farm (requesting an agricultural number), investment subsidies and regulation can be answered by the **Department Agriculture and Fisheries of the government**. Other administrative and financial questions are usually handled by specialized **accountancy firms** (e.g. SBB, Acerta) and **banks** (e.g. KBC). However, for more substantive advice generally starters in agriculture consult other institutes and organizations. Although some entrants want to cover all bases, the type of advisory services consulted is sometimes related to the type of business model that is assumed (Beers, 2016). The most traditional business model focuses on sustainable production methods, about which advice can be sought through a whole range of **farmer organizations, study and consultancy bureaus, and practice and test centres**. A second business model wants to create added value on the countryside, e.g. through the production of an exclusive product for a demanding consumer. Entrants focusing on this business model seek advice from **specialized farmer organizations** (e.g. Bioforum, focused on organic production) **or specialized instances** of farmer organizations (e.g. Steunpunt Korte Keten, etc.), **relevant training centres** (e.g. Landwijzer) and **relevant sustainable food networks and initiatives** (e.g. CSA network, Boeren en Buren, Voedselteams, etc.). In some projects, also the **local government** is involved and gives direction

(e.g. BoerenBruxselPaysan). The third business model is focused on new products and new markets, and makes use of highly technological developments to produce new foods (insects, in vitro meat, etc.), in new places (e.g. cities, roof green houses, business parks, etc.), for new applications (e.g. pharmacy industry), and in new ways (e.g. without waste streams, cradle-to-cradle). Starters wanting to set up this kind of business surround themselves often with **consultants from different sectors**, sometimes through **incubators and accelerators**. Because of the extensive knowledge that is required and the high investment costs involved, these projects are often **public-private partnerships**.

The agricultural advisory services available in Belgium and their role in relation of new entrants

State funded or part funded agencies

- **Department Agriculture and Fisheries.** The division Entrepreneurship and Development of the Department Agriculture and Fisheries manages the Flemish Agricultural Investment Fund. The division is responsible for the establishment premium, the interest allowance and the additional safeguard, to which starters in agriculture are entitled to. What is also relevant to starters is KRATOS, the farmer advice program, and the permanent training the government offers through study days, brochures, practice centres and formal agricultural education. Some new entrants, of which the business model focuses more on new products and new markets may also seek advice from the Enterprise Agency.
- **Research institutes, and practice and test centres.** There are two state-funded general agricultural research institutes, one at the level of Flanders (ILVO) and one at the level of the province West-Flanders (Inagro). Besides those general research institutes also a series of practice and test centres exist which are focused on a specific agricultural subsector (PCA potatoes, LCG cereals, PCS ornamental plant sector, Pcfuit fruit sector, PCG and PSKW vegetables, PCH strawberries and tomatoes and paprika under glass, LCV fodder crops, NPW chicory, VCT storage and preservation, practice centres focused on cattle, poultry, pigs, small ruminants, and bees). Especially the specialized practice and test centres stand into contact with the farmers of the subsector they are focused on, and provide technical advice for that subsector.

Privately funded advisory services

- **Accountancy firms and banks.** Accountancy firms and banks provide answers on administrative, legislative and financial questions of farmers with respect to the acquisition or the initiation of a farm business. The best known accountancy firm focused on the agricultural sector in Flanders is SBB, whereas banks like Crelan (which has its roost in agriculture) and KBC have specific consultants that offer administrative, juridical and legislative advice to farmers.
- **Farmer organizations.** There are four main farmer organizations in Flanders, which are Boerenbond, 'Algemeen Boeren Syndicaat' (ABS), 'Vlaams Agrarisch Centrum' (VAC) and Bioforum, the latter which is focused on organic production. These farmer organizations aim to help farmers in key moments of their career (from starting, making key strategic decisions such as large investments, switching to organic farming, etc. to stopping) and help them with the administrative burden of entrepreneurship. The largest farmer organization is Boerenbond, which groups many instances offering advice and support to farmers that are affiliated, including (1) an Innovation Support Centre (innovatiesteunpunt) that informs and inspires farmers about new challenges and opportunities and that supports them with the development and implementation of concrete innovative projects on their farm; (2) a Support Point Green Care (Steunpunt Groene Zorg); (3) a Knowledge Centre Farm Succession (Kenniscentrum Bedrijfsopvolging); (4)

AgroCampus, an education service centre for farmers; and (5) Agrobeheercentrum Ecolwadaat, which offers support to groups of farmers that want to work in a certain area on agricultural landscape management. Also Groene Kring belongs to this larger Boerenbond group, which can be considered as the youth movement of the agricultural sector. In this respect Groene Kring organizes different kinds of activities, such as workshops, discussion evenings, competitions, and foreign study trips and fairs, which may give inspiration to young farmers for new and interesting business models. Overall, farmer organizations are specialized in offering advice related to developing sustainable production methods and creating added value on the country side – for which they sometimes have dedicated advisors. Farmer organizations are among others concerned with the organizations of meetings or workshops related to farm entry or innovative business models, and successful concepts are often repeated over time. An example of the former is the inspiration evening by the Knowledge Center Farm Succession. However, they can also be organized more spontaneously, in response to current projects, new insights, hot topics and availability of experts. In this case the meeting/workshop is often a result of the collaboration between different organizations (e.g. in collaboration with Rurant, Unizo, Rikolto, etc.).

- **Independent study and advice bureaus.** Besides through farmer organizations, advice is also sought through a range of independent study and advice bureaus (Steunpunt Korte Keten, DLV Belgium, Creafarm bvba, Bodemkundige Dienst van België, Landbouwadviseur AW-ADVIES, BE & partners, Centrum voor agrarische boekhouding en bedrijfsleiding CCAB vzw, Decock & co bvba, LIBA bvba, Limburg Adviesbureau voor land- en tuinbouw vzw, SBB Bedrijfsdiensten cvba, Kathleen Creelle, Taco cvba, Bio consult bvba). Their focus is especially on the development of sustainable production methods although they are also independent advisors which focus on the new business models. They can benefit, just like the farmers organizations from the KRATOS advice system that was installed by the government.
- **Incubators and accelerators.** These are companies that help people with innovative product ideas to start-up and grow by providing services such as management trainings and office space. Recently Agropolis, an agricultural incubator was developed in Flanders, but also food or sustainability incubators offer opportunities, such as GreenBizz (includes Little Food, produces crickets) and Abattoir (includes ECLO, produce micro-vegetables). Also partnerships between different companies can result in new business models (such as the collaboration between Aqua4C and TomatoMasters), whereas public-private partnerships may result in very knowledge- and capital intensive projects (such as the roof greenhouse Agrotopia). The focus of these incubators and these partnerships is thus clearly on innovative entry modes through the development of new products and/or the use of new market channels.
- **Sustainable food networks and initiatives:** There are different non-profit and non-governmental organizations and networks in Flanders that want to contribute actively to the transition to a more sustainable food system. Organizations like CSA-netwerk Vlaanderen, Voedselteams and Boeren&Buren are focused on one specific short supply chain model and their mission is to support and answer questions of farmers that are interested in this model. Organizations like Wervel, Boerenforum, Rikolto also occasionally answer specific questions of farmers, but focus their efforts to a larger extent on lobbying activities and awareness raising campaigns. Community initiatives like Commons Lab (Antwerpen) and Foodlab (Ghent) on the other hand want to involve local consumers in local food initiatives, and therefore highlight alternative farm business models. Whereas all advisory organizations have a website where interested farmers can find contact information and information about the main advisory services delivered, non-profit and non-

governemental organizations excel at reaching farmers and consumers through social media such as Facebook and Instagram.

Education institutes/Universities

- **Universities and colleges:** A professional bachelor in agro- and biotechnology is offered by VIVES, HoGent, Odsiee, Thomas More and PXL, whereas KU Leuven, UGent, UA and VUB offer academic bachelors and masters in bio-engineering, biosciences and applied biological sciences. The former are more practice-oriented than the latter and therefore may be more interesting for starters seeking to take over or set up a farm. However, in the context of developing new business models, they are both not very accomodating .
- **Agricultural training centres:** There are also some agricultural training centers that organize more practical-oriented and specialized courses focusing among others on business models, such as AgroCampus, Nationaal Agrarisch Centrum and Praktijkcentrum voor Land en Tuinbouw. Groene Kring co-organizes courses together with Agrocampus, but also organizes courses of its own, i.e. a junior class management and a junior class financial insight. Landwijzer is a special agricultural center that offers a 2.5-year part-time formation in biodynamic agriculture. During the last six months of this training, students have to brainstorm about and develop their own business model. Whereas Landwijzer excels in offering advice about how to create added value on the country side, the other training centers focus mainly on the more traditional business models.

1.9 United Kingdom

The United Kingdom is comprised of four “countries”, of England, Northern Ireland, Scotland, and Wales each with differing approaches to advisory services. The governance regimes (jurisdictional, devolved powers, funding allocation, historical institutions) of each country’s approach to agricultural extension and knowledge production is very fragmented, with at least 80 sources of knowledge provisioning recorded. Historically, the UK’s National Agricultural Advisory Service (NAAS) provided extension services as part of the mandate of the Ministry of Agriculture, Fisheries and Food (MAFF) . The NAAS was rebranded as ADAS and then privatized in 1997, leading to what Curry et al. (2012) describe as the driving force behind the prominence of a laissez-faire approach to delivery of agricultural knowledge resources in the UK. Prager and Thomson (2014) suggest that “The retreat of government from agricultural research and extension has resulted in a diversification of providers from the private and NGO sectors.” Advisory services are delivered through many competing mechanism and organizational structures of which priority and agenda setting is determined by the various decision-making and member bodies rather than any government department appointed office. This has implications for new entrant advisory services. Despite these trends, Scotland and Wales have demonstrated more public driven approach to new entrant advisory services than England.

AKIS Project

In 2011, as part of the Agricultural Knowledge and Innovation Systems (AKIS, Prager and Thomson 2014) project, researchers carried out a systematic review of agricultural knowledge systems, including a detailed survey effort of advisory services in the UK. This work is an important foundation

for understanding the delivery of agriculture advisory services, including an evaluation of the AKIS in the UK. This report draws upon this work to understand the delivery of new entrant services.

Prager and Thomson’s summary suggests that in a milieu the different advisory agencies and member organizations, actors compete for membership, participants and funding allocation in an increasingly siloed system. Table 2 shows a nearly comprehensive list of advisory groups categorized by governance structure and geography. The organizations that provide direct relevance to new entrants are underlined and will be discussed in greater detail.

Table 2: Overview of Delivery Mechanisms for Advisory Services (Adapted from Prager and Thomson 2014)

| Governance | Type | Organisation (Geography) |
|------------------------|--|---|
| Public sector | Government departments | Department of Environment, Food and Rural Affairs (DEFRA) (UK) and Rural Payments Agency Scottish Government (SG) Agriculture, Food and Rural Communities Directorate, and Rural Payments and Inspections Directorate <u>Farming Advisory Service (Farming Connect) (Wales)</u> Department of Agriculture and Rural Development Northern Ireland (DARDNI) |
| | Government agencies | Animal Health and Veterinary Laboratories Agency (E, S, W) and Veterinary Service (NI) Natural England (NE), Environment Agency (EA) (E only from 2013) Scottish Natural Heritage (SNH), Scottish Environment Protection Agency (SEPA) Natural Resources Wales (NRW) Forestry Commission (FC) and FC Scotland (FCS) Food Standards Agency (FSA); Food & Environment Research Agency (FERA) |
| | Local/regional agencies | National Park Authorities (not NI) Scottish Enterprise (SE), Local Enterprise Councils, Highlands and Islands Enterprise (HIE), Crofting Commission Health and Safety Executive (HSE) |
| | Parastatal organisations | <u>Scotland’s Rural College (SRUC/SAC)</u> <u>Lantra (the Sector Skills Council for land-based and environmental industries)</u> Agri-Food and Biosciences Institute (AFBI) (NI) Technology Strategy Boards; Research Councils (e.g. BBSRC) |
| Research and Education | Universities (Higher Education Institutes) | Universities Land based/ technical/agricultural colleges (e.g. Norfolk, Suffolk, Somerset) National rural exchange centres |

| | | |
|----------------------------|---|--|
| | Research Institutes (mostly or partly state-funded, e.g. by research councils) | Rothamsted, Pirbright, John Innes Centre, East Malling Research, James Hutton Institute (JHI), Moredun, Scotland's Rural College (SRUC) Agri-Food & Biosciences Institute (NI) Organic Research Centre, Stockbridge House NIAB-TAG National Institute of Agricultural Botany <u>College of Agriculture, Food and Rural Enterprise (CAFRE)</u> |
| Private sector | Food chain actors (inputs, distributors, buyers) | Merchants, processors, manufacturers, buyers and retailers, accreditation organisations, multi-national companies (e.g. supermarkets, processors, agricultural inputs, machinery) Campden BRI (industry R&D organisation) |
| | Independent consultants / Private agricultural advice companies/ Commercial companies | Consultancies and service providers Veterinarians Consultants – agriculture, technical, crop, livestock, energy, land, agribusiness, both individual and companies, e.g. ADAS, Ricardo-AEA (formerly Momenta) <u>Land agents – agribusiness/ management/ financial</u> <u>Quality Meat Scotland (QMS)</u> <u>Scottish Agricultural College (SAC, the consultancy arm of SRUC; see above)</u> |
| | Levy bodies Trade Associations | <u>Agriculture and Horticulture Development Boards (AHDB)</u> with six sector operating divisions: BPEX, DairyCo, EBLEX, HDC, HGCA, Potato Council British Beet Research Organisation (BBRO), Processors and Growers Research Organisation (PGRO) Agrisearch (NI) Agricultural Industries Confederation (AIC) Association of Independent Crop Consultants (AICC) |
| Farmer based organisations | Farmers' cooperative | Scottish Agricultural Organisation Society Ringlink and other machinery rings |
| | Producer organisations | Horticultural Producer Organisations |
| | Farmers' groups | <u>Monitor farms (run by SAC, HGCA/ SAOS, QMS) Pilot catchments</u> LEADER Local Action Groups (wider than farmers) |
| | Land manager representative bodies | <u>National Farmers Union (NFU) (E&W), NFU of Scotland (NFUS), Farmers Union</u> <u>Wales (FUW), Ulster Farmers Union (UFU)</u> <u>Scottish Association of Young Farmers Clubs (SAYFC)</u> <u>Federation of Young Farmers</u> <u>Tenant Farmers Association/ Tenants Association</u> Scottish Organic Producers Association (SOPA) Soil Association/ Soil Association Scotland Country Land and Business Association (E&W) Scottish Land and Estates <u>Scottish Crofters Federation (SCF)</u> |

| | | |
|------|--------------------------------------|--|
| NGOs | Charitable trusts, foundations, NGOs | Farming and Wildlife Advisory Group (FWAG) Linking Environment and Farming (LEAF) Royal Society for Protection of Birds (RSPB) Royal Highland Show and Agricultural Society Royal Agricultural Society of England Various agricultural societies, e.g. breeding (UK) <u>National Trust (NT) (E, W), National Trust for Scotland (NT/NTS)</u> Rural Support (NI) |
|------|--------------------------------------|--|

New Entrant Advisory Programs

The broad trend of commercialization of advisory services in the UK has been shown to direct resources towards the established farmers and commodity groups at the expense of new entrant farmers (Prager et al. 2016). At the same time, the diversity of sites allows for innovation and niche consulting to emerge, some directly targeting an audience of new entrants. The following section explores some of the important organizations and efforts that explicitly focus on new entrant advisory services. Notable in this analysis is an observation of the new entrant innovation appearing to come primarily from government supported initiatives.

Farming Connect (Wales)

Farming Connect of Wales follows a publicly driven approach to advisory service provisioning. Farming Connect is part of the Welsh Governments mandate to support rural business and rural industry. Most services are fully funded or highly subsidized. While Farming Connect is a broad, “one stop shop” for rural business issues such as capital acquisition, compliance, legal entity registration, and rural news, Farming Connect also houses the Agri-Academy, a wrap around service provider for new entrants. The Agri Academy is composed of an intensive business mentoring program that combines elements of rural leadership, entrepreneurship and horizontal networking among aspiring new entrants. The program is in its seventh year and has 200 alumni.

Scotland’s Public New Entrant Programs

In recent years, a variety of government agencies have provided new programs or supports for new entrant farmers. First, the Farm Advisory Service (FAS) has a dedicated New Entrant resource curriculum and event calendar. These events are usually short trainings on business skills, and horticultural practices. Notably, the Scottish government formed the Farming Opportunities for New Entrants programme (FONE). In this programme, the Scottish Forestry Estate directs estate lands for favourable new entrant tenancies. The programme has incentivized other public lands to become available for new entrants as “starter farms”. The FONE programme is a collaboration between the Scottish Association of Young Farmers, Scottish Land and Estates and the National Farmer’s Union (Scotland, NFUS). This multi sectoral collaboration is also evident in the promotion of Joint Ventures by the NFUS.

National Farmer's Unions and Joint Ventures

The National Farmer's Unions play a role on new entrant technical assistance throughout the UK. The Unions appoint leadership to their Next Generation Policy Forums, designed to drive new entrant political agendas. In Scotland, this group has led to the creation of the Joint Venture Hub, a collaboration between land agents like Savills, solicitor firms like Brodies LLP, and the NFU. Here, the innovation of joint ventures is promoted, where existing farm operations without successors form new legal arrangements with new entrants. The Union provides access to a database of new entrants seeking opportunities and existing landowners or farm businesses seeking new business partners. The land agents aid in identifying parcels, the Scottish Agricultural college facilitates business model creation, and the solicitors aid in drafting flexible contracts for new rural business. The Scottish Land Commission also produces guidelines for new entrants seeking joint ventures as part of Scotland's Land Reform Agenda.

The Land Mobility Scheme and the Young Farmer's Club of Ulster

The Land mobility Scheme is a programme supported by the Department of Agriculture, Environment, and Rural Affairs of Northern Ireland. At its core, the Land Mobility scheme is a matching service between new entrants and landed farmers. In contrast to the Joint Venture Hub, Land Mobility does not support any one model to solve a land access or succession problem. Instead, it works with both new entrants and retiring or near retiring farmers to support their desired transitions. In the two years of this programme, Land Mobility has registered 223 interested parties and facilitated 55 new unique "deals" between new entrants or retiring farmers. Sixty percent of those registered are under the age of 50.

The first "New Entrant" Monitor Farm in Scotland

A joint (funding and management) program of the Scottish Government, Quality Meat Scotland, the European Union's Knowledge Transfer and Innovation Fund, and the Agriculture and Horticulture Development Board, established the Monitor Farm Program in 2016. The program provides resources to a network of model farm enterprises that make transparent their farming practices and business records to a community of interested actors. While these farms are generally larger established enterprises, in 2017 the Monitor farm programme enlisted its first "new entrant", a mixed livestock and barley farm on Shetland to serve as an archetype.

Third Sector New Entrant Advisory Services in England

With the absence of a dominant publicly driven agricultural advisory presence in England, it is worthwhile to note a diversity of NGO and third sector new entrant advisory provisioning. The National Trust, a significant land owner across the UK, has a variety of agricultural holdings that they make available for new entrants. In particular, the Llyndy Isaf scholarship programme offers a salary for an aspiring Shepherd to manage one of their signature upland properties. During this time, the shepherd takes on an apprenticeship with an established upland sheep farm that is also a national trust property. The Ecological Land Cooperative is a new organization that seeks to acquire agricultural land and offer subsidized tenancies to farmers who want to practice alternative agriculture. The Earth Trust offers a unique business incubator model that offers single properties to multiple complimentary new entrant entrepreneurs who are able to pool their resources and share equipment. Fresh Start Land

enterprise is an intensive business incubator that matches horizontal networking, business skill building, and inspirational leadership seminars to provide one-to-one rural business consulting.

Crofting

Crofting is a legally distinct and culturally specific agricultural practice that exists in distinct geographical areas of Northern Scotland associated with the “Highlands and islands.” Crofts are historical parcels of land that are linked to certain forms of consistent agriculture land use, development and access rights. Culturally, Crofts are associated with smallholder production, regional markets, and upland beef and sheep rearing. Crofts are managed by the Crofting Commission to ensure the use and access rights of the crofts are compliant to previous Crofting Acts. The Scottish Crofting Federation (SCF) is a registered charity with a goal of supporting the livelihoods for existing crofters and ensuring the future of the crofting practice. Thus, supporting new entrants into crofting is a key priority of the SCF, providing wrap around technical assistance and political lobbying for the unique crofting lifestyles and legal statutes. The SCF runs annual young crofter awards, frequent workshops in applicable rural skills, and is frequently advocating government to lower the barriers to entry for aspiring crofters.

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Appendix I: Guidelines for collection of strategic planning of advisory services

Deliverable 2.3 'Strategic business planning of advisory services'

Lead: Teagasc & FHS

Contributions: All partners

Due: June 2019

Objective

To learn about the advisory services available to new entrants in each country. Including how they operate, what services they provide and what their focus is. How accessible they are to new entrants. This is to enable us to identify effective advisory practices that can be shared or replicated across the partner countries. Task 2.4 will also to identify gaps where the information flow to new entrants is not sufficient or where the support to help new entrants bring their ideas to fruition is not adequate.

Advisory Review

1. Give a short overview of agricultural advisory services in your country and how they operate within the agricultural sector.
2. List the agricultural advisory services available and describe their role in relation to new entrants.
 - a. State funded or part funded Agencies
 - b. Privately funded advisory services
 - c. Education Institutes/Universities
3. Describe the strategy for new entrants of each advisory organisation identified with respect to:
 - a. Information and advice on the establishment of new business models
 - b. Information and advice on modes of entry to farming
 - c. Are there dedicated advisors on *new* entrant business models?
 - d. Innovative ways to provide information and advice to new entrants
 - i. Websites
 - ii. Social media
 - iii. Short information meetings/workshops
 - iv. Young Farmer Discussion Groups
4. Useful links: EufRAS website: www.eufRAS.eu

NEWBIE

New Entrant network

Business models for Innovation, entrepreneurship and resilience
in European Agriculture

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