NEWBIE: Deliverable 2.2

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Inventory of new entrant case studies

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Executive summary

The case study collection of 90 new entrants from nine European countries provides valuable insights into business and entry models, strengths, weaknesses, hurdles, barriers, gaps, skills and competences of and for new entrants into farming. The results of the explorative study are not representative. The report aims to present the diversity and heterogeneity of new entrants' entry and business models. The spatial distribution among the countries is diverse. In Ireland, the UK, Slovenia, The Netherlands, and Germany the geographical extension is wide, while in other countries the interviews took place in preferably one or two regions. The main road into farming for the interviewed new entrants is the launch of a new farm business, followed by the takeover of a family farm respectively another farm. The most often named motivations of new entrants for entering the farming sector are passion, self-fulfilment, family tradition, market opportunities, and climbing the career ladder from a worker to self-employment and entrepreneurial independency. Emotional arguments and enthusiasm are named more often than more rational, like financial, motivations.

Most often used business models belong to differentiation (niches, short value chains, Unique Selling Proposition), on-farm non-agricultural diversification (agri-tourism, social and pedagogical resources), and Alternative Food Networks (Community Supported Agriculture, producer-consumer-cooperatives). Advisory services as well as personal contacts and networks build the most frequently used support channels of newbies. On-farm food processing is frequently used. In line with the findings on food-processing on-farm, direct sale and other short value chains are building an important marketing strategy of many farms. Only little differences appear when comparing the economic performance assessment between new farm businesses and takeover of existing farms. Small farms calculate their economic performance similar to larger farms, so that it can be argued that the farm size is not a determinant of farm business success. The majority of new entrants name a (very) difficult access to land. Difficulties to access land are more frequently named than access barriers to networks, markets, labour, knowledge, and capital. However, access to all of these resources are named (very) difficult by at least some new entrants; especially for complete newcomers into farming. The key strengths of new entrants named in the partner countries cover very different fields; mainly related to production, marketing, and on-farm services, personal soft skills, expertise in agricultural production, location, and support measures. Contrarily, the major weaknesses of new entrants can be summarized with high workload, limited access to key resources, often land and financial ones, bureaucracy, and lack of agricultural expertise.

The case study collection provides manifold farm-specific information and topics for discussions within the networking (WP3) and toolkit (WP4) tasks of the Newbie project. This includes steering group meetings, discussion circles, international exchanges, Newbie conferences, but also practices abstracts, practice descriptions, and pedagogical resources for advisors and educators.

1 Introduction

Little is known about new entrants into farming in Europe. How have they started their farms? What challenges have they faced? Why were they successful? In order to gain insights into the current circumstances of new entrant farmers in Europe we have conducted an inventory of new entrants. The inventory provides an important primary data source, which covers nine countries in Europe. Additionally, it provides a foundation to guide subsequent Work Packages and Deliverables. Its aim is to describe the good-practices of new entrant business and entry models in Europe with a particular focus on: business and entry models, strengths, weaknesses, hurdles, barriers, gaps, skills and competences of and for new entrants.

The national Newbie project partners were responsible for the collection of data of ten new entrants per country. A pre-tested standardized questionnaire had been used in all countries when conducting personal face-to-face interviews with the new entrants. The instructions and the standardized questionnaire are attached to this Deliverable (s. Annex I: Instructions for the case study collection and Annex II: Standardized questionnaire; both from September 2018). The instructions of Annex I outline the schedule and further details on how to choose the ten case studies per country and how to conduct the interviews. The guidelines emphasize that within each country both main types of new entrants, successors of existing farms and newcomers from outside agriculture, have to be covered. However, each country was independent in setting a certain focus with regard to the national framework conditions. Furthermore, the guidelines encourage the interviewees to select case studies from more than just one region per country and with diverse agricultural structures (farm sizes, full-time vs. part-time, different farm orientations (livestock, crops), various marketing channels, on-farm non-agricultural diversification). This case study collection is not being a representative reflection for new entrant farming in Europe, since each national collection consists of only ten interviews. The Deliverable's objective is to provide detailed insights into innovative and inspiring good practices of new entrant into farming taking place in all of the nine project partner countries. The case study collection has an explorative character to show the diversity and heterogeneity of new entrants' paths into farming and business models. It builds a foundation to come from case studies to evidence-based research on agricultural newbies outside this study. Despite the provision of common instructions, like the criteria to select interviewees from more than one region and to approach both main types of new entrants (see above), inter-national comparisons are weak. The national framework conditions show versatile characteristics, so that the project partners decided based on these national views, whom to interview. While some countries visited mainly complete newcomers, e. g. France, in other countries, like Slovenia, the partners concentrated their selection on family successors. On the one hand this widens the range of new entrants covered in the sample, but on the other hand the comparability of statements between countries is limited. As already indicated, the presented figures and numbers cannot be used for any comparisons with other studies or data, like agricultural statistics or quantitative research designs. Besides the presentation of summarizing results of the case study collection within this report, the majority of new entrants interviewed for the case study collection are also being presented individually on the Newbie website (www.newbie-academy.eu → storytelling). These farm presentations show in a condensed way their entry models, business models, a short farm description, the start of the farm, the newbies' main motivations, and key success factors. The storytelling of each farm is supported with videotapes (if applicable), photos, and contact information.

The case study collection provides manifold farm-specific information and topics for discussions within the networking (WP3) and toolkit (WP4) tasks of the Newbie project. This includes steering group meetings, discussion circles, international exchanges, Newbie conferences, but also practices abstracts, practice descriptions, and pedagogical resources for advisors and educators. The national and international networks benefit from inspiring and innovative examples of new entrants, which are presented within this written report in a descriptive way and additionally presented online on the Newbie website.

2 Case study collection

General overview

The inventory of new entrant case studies (Deliverable 2.2) analyses the data collected from 90 new entrants in the nine Newbie partner countries (s. Figure 1). The analysis includes each ten case studies from the nine Newbie partner countries UK, Ireland, The Netherlands, Belgium, France, Portugal, Bulgaria, Slovenia, and Germany. The spatial distribution of case studies among the countries is diverse. In Ireland, the UK, Slovenia, The Netherlands and Germany there is a wide geographical spread of case studies, while in other countries the interviews took place in one or two regions. Welsh, English and Scottish newbies belong to the UK sample. The German sample covers case studies from all regions including the Berlin Metropolitan Area, Bavaria, and a farm close to the Baltic Sea. In Belgium the Flemish region has been chosen for collecting new entrant case studies, while in Bulgaria the interviewed farms are situated in the mountain region in the South of the country south of the cities of Sofia and Plovdiv as well as two interviews from North-eastern Bulgaria. The Portuguese newbies are located east of the capital of Lisbon in the region of Evora. New entrants, which have been chosen for the case study collection in France, are mainly from the Western parts, Atlantic in character, except for two new entrants from Central France and one from the Belgium boarder area.

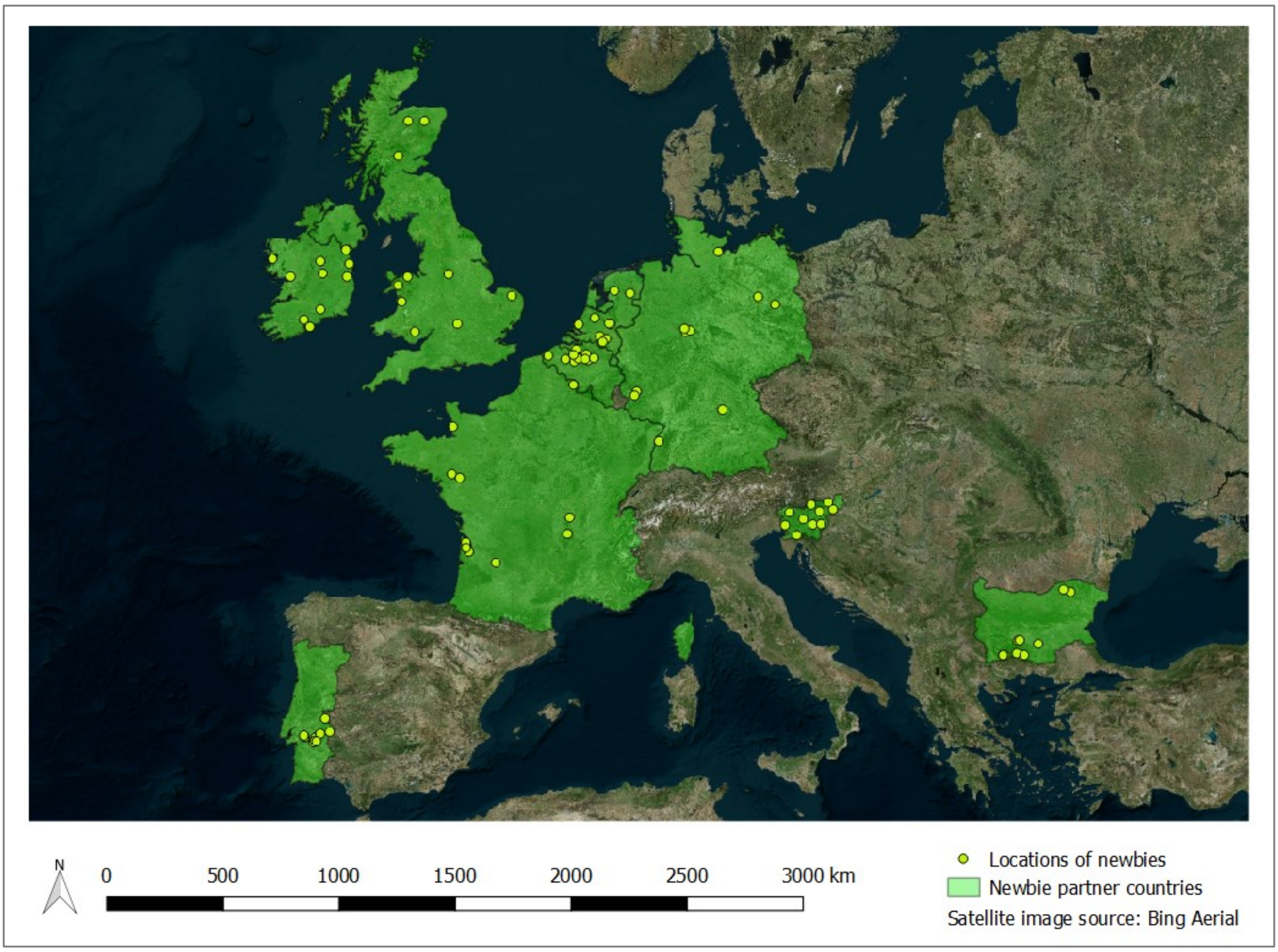


Figure 1: Location of the 90 new entrant case studies within the nine Newbie countries UK, Ireland, The Netherlands, Belgium, France, Portugal, Bulgaria, Slovenia, and Germany.

Entrance into farming, farm structure, and support in the entry phase

The most common entrance into farming for the interviewed new entrants is the launch of a new farm business, followed by the takeover of family farm (s. Figure 2). This was especially the case studies from Portugal, UK, France, Bulgaria, and The Netherlands where many entrants started a new farm business, while five or more of the Slovenian, Belgian and Irish new entrants took over the farm of their families. Furthermore, one Dutch new entrant took over a derelict dairy farm, so that he had to started from scratch by buying all the required resources (seeds, machinery, storage etc.) to run the farm. The large majority of interviewed farmers, which have taken over an existing farm, have altered the farm business concept significantly. Examples of farm business changes which took place following succession by new entrants are the integration and exchange of crops and livestock, on-farm non-agricultural diversification, processing and new marketing concepts.

The idea to start or enter a farm business is in many cases directly linked to the farmers' childhood on a farm or from growing up in rural areas with close contacts to everyday farm life. The Slovenian cases are dominated by family succession, but it has to be highlighted that two new entrants restored derelict farms of family relatives. The importance of family succession and the continuation of a family tradition were highlighted by some Bulgarian interviewees. The majority of Belgian case studies grew up on a farm. One of the German new entrants took part in a permaculture course in Sweden on Ridgedale Farm AB from Richard Perkins (http://www.ridgedalepermaculture.com/). Richard Perkins and his team over courses on farm as well as online on how to make small farms work. Most of the Dutch farmers had some background in farming but entered farming in many different ways. Some of the interviewed newbies were complete newcomers, like a Slovenian who completed non-agricultural studies before beginning their farm. Four Irish new entrants had a job with no connection to agriculture before considering to become a farmer. Two UK new entrants have a background in army and chemistry and decided during their previous occupation to step into agricultural practice. Some Portuguese cases studies highlight that they were no longer happy with their previous occupation or did not find a job, so that they thought of entering farming.

New entrants' motives to enter the farming sector were often: passion, self-fulfilment, family tradition, market opportunities, and climbing the career ladder from a worker to self-employment and entrepreneurial independency (*being the own boss on-farm*). Emotional arguments and enthusiasm are named more often than more rational choices, like financial, motivation. A close link to nature and environmental protection is tangible when listening to the new entrants' stories. The Dutch cases name independency and the possibility to create one's own future as strong arguments to become a new entrant into farming. They love their everyday life, enjoy experiencing seasons on the farm, and are proud of their work and produce. They also want to keep their farm profitable. Passion is highlighted by some Irish newbies, while UK's new entrants state that also coincidence and luck are important (*to be at the right place at the right time*). The connection to nature is highlighted by the UK newbies; they want to show that organic farming creates added value for all as well as that nature conservation and viable farming can go hand in hand. The basis of some Belgian new entrants lies in their student days and networks. Independency, new entrepreneurship, and the production of healthy food are the main motivations of Belgian newbies. Some Portuguese want to continue their family heritage, whilst others had the dream of having an own farm, escaping everyday life, coming closer to nature, and earning an income as key motivations. The Portuguese farmers aim for working innovatively and in a way that is ecologically sound. The fulfilment of a childhood dream is also raised by German new entrants, but they also name some business chances they saw as main motivations to step into farming, including possibility to buy land and potential markets. Furthermore, the German farmers want to produce high quality food whilst carrying out a job that they enjoy. Also some Slovenian interviewees see new opportunities in farming they wanted to capture. Slovenian new entrants value their independency, but see also responsibility for carrying on family farming and tradition. Two Irish new entrants were not satisfied with their previous work for what reason they changed their field of work completely. Many Bulgarian new entrants have a background in practical agriculture as a worker, but wanted to become self-employed and responsible for decision-making. The Bulgarian cases also point out the aspect of family tradition and independency.

The channels and means by which new entrants have searched for a farm or an entry option are varied. Furthermore, networks are named as a key channel into farming, for example of Belgian and Irish interviewees. Personal contacts were very important in Ireland and the Netherlands. The German case studies name agricultural associations, private tenders (newspapers, online), and their own job as a consultant as important channels for finding the paths into agriculture. In Portugal, the new entrants also made use of private tenders in newspapers and the internet, farm visits, but also through a Dutch real estate agency. One Portuguese interviewee found the farm when participating at a meeting of an organic producer working group. Real estate agencies are the most frequent search channels in the UK – followed by newspapers, internet, and agricultural advisers. One UK newbie entered farming via a scholarship from the landtrust. Apart from personal contacts, Dutch new entrants also name the growing importance of the internet. Bulgarian newbies rely strongly on family help, but also regional networks and advisory services. Interestingly, a Slovenian newbie found his farm through young farmers' EU tender calls.

If they had the opportunity to start their farm again, the majority of farmers would repeat the entry into farming with no or only minor changes. Some new entrants would take more time to plan everything in a better way and for long-term. However, sometimes it is needed to decide short-term, because otherwise the option might disappear. Furthermore, some mention that more knowledge in farming would be better before starting. Only one Belgian newbie would not start a farm again.

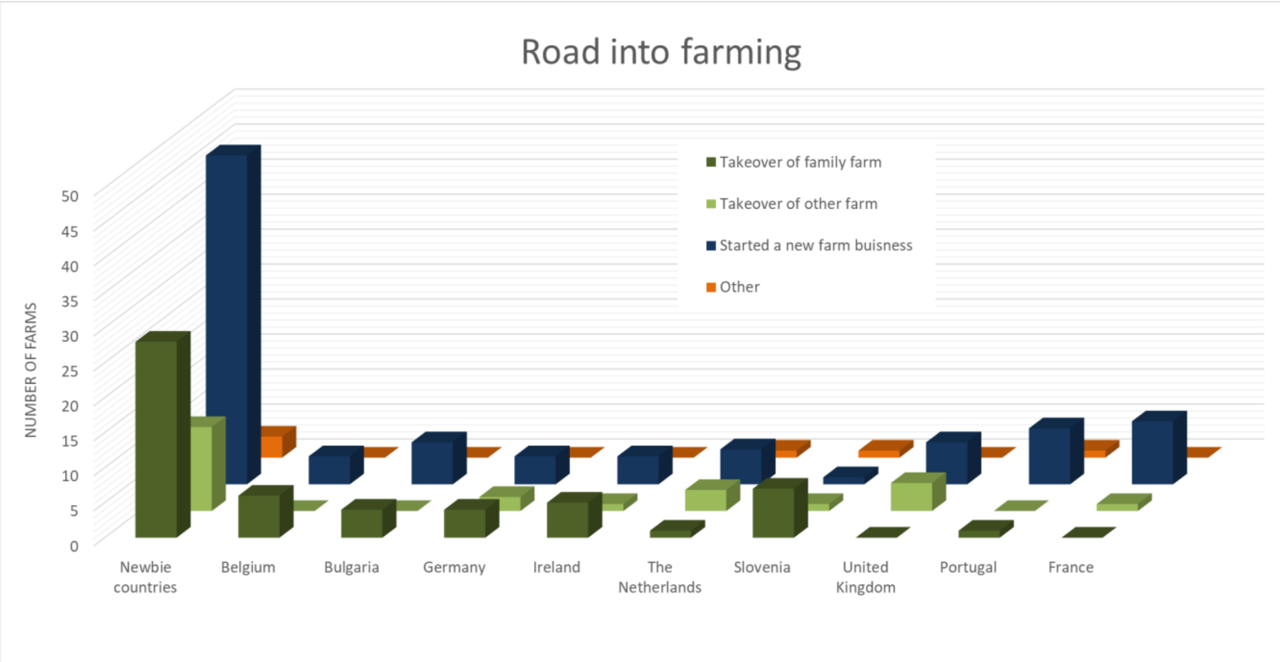


Figure 2: Roads into farming: new farm business vs. takeover of existing family and non-family farms

Most interviewed new entrants run their farm as a family farm or individually (s. Figure 3). However, also collaborative arrangements (contract farming, partnerships) – especially from the UK, Portugal, and The Netherlands – and community-supported business concepts from Belgium and Germany are among the interviewed newbie farms. In Slovenia, all ten case studies are run as family farms, while nine of the ten French case studies are run individually.

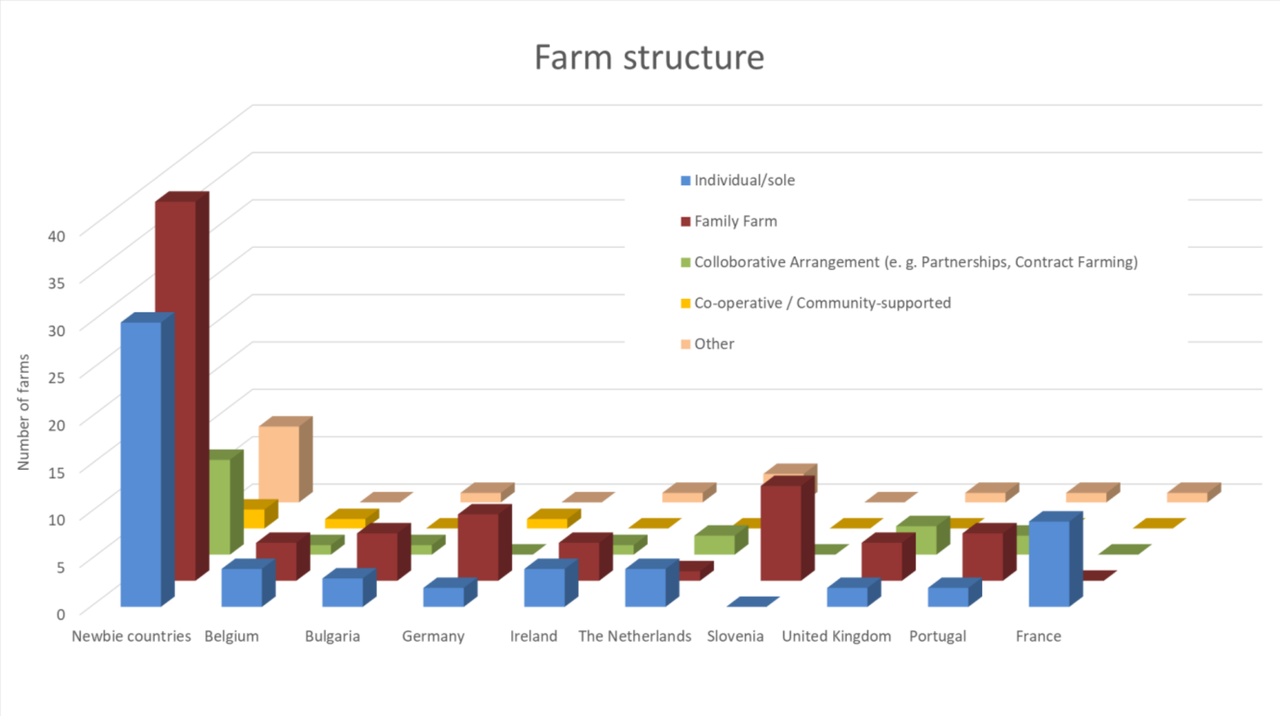


Figure 3: Farm structure

More than three quarters of the farms participating in the survey used support in the entry phase, while the remaining one quarter of new entrants started a new farm business or took over an existing farm without any external support (s. Figure 4). Here, the latter case prevails. Most new entrants, who did not make use of any external support measures in the starting phase, are from Germany and Bulgaria. Contrarily, all Irish, Slovenian, French, and British new entrants made use of some kind of support.

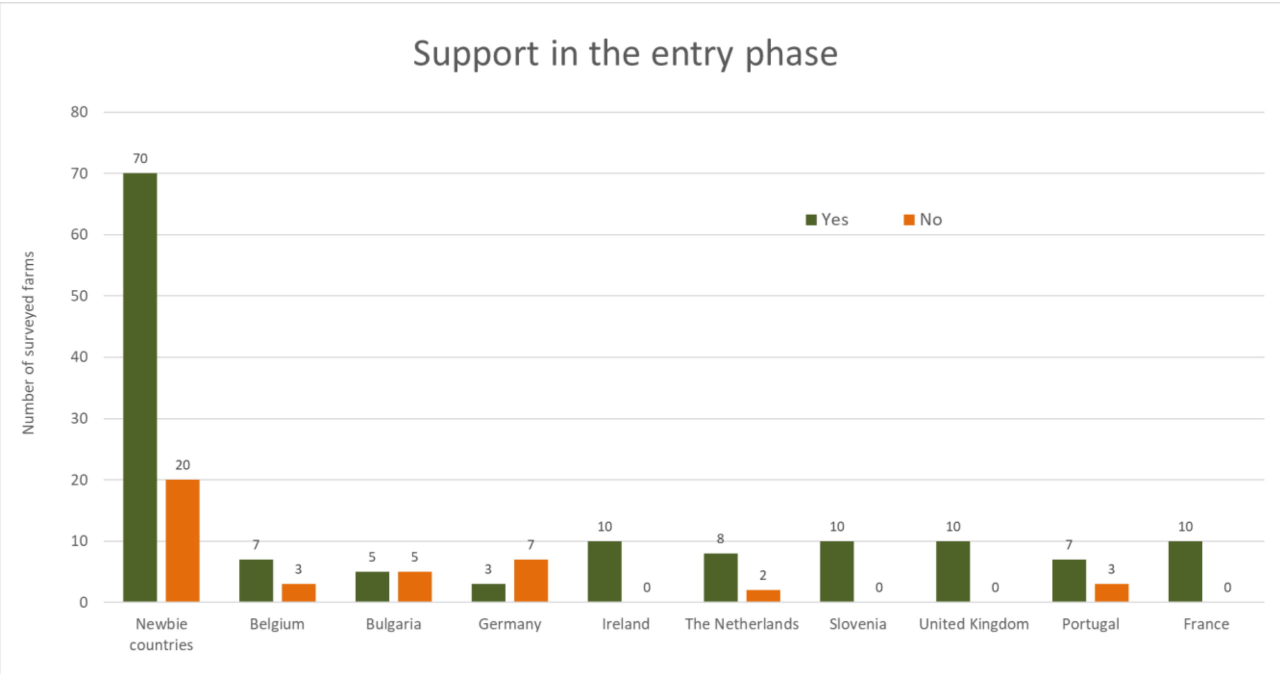


Figure 4: The large majority of new entrants sought external support in the entry phase

Advisory services as well as personal contacts and networks form the most frequently used support channels (s. Figure 5). Both advisory service systems, public and private, play an important role. Advisory services are often utilised by new entrants in takeover process of farms in Ireland, Slovenia, France, and UK (all mainly public), The Netherlands and Portugal (both mainly private). The support from farmers' organizations is also important to many new entrants. Some of these work more generally, while others focus on specific production systems, such as organic. Among the other supporters are financial institutes, accountants, LEADER, and non-institutionalised online support.

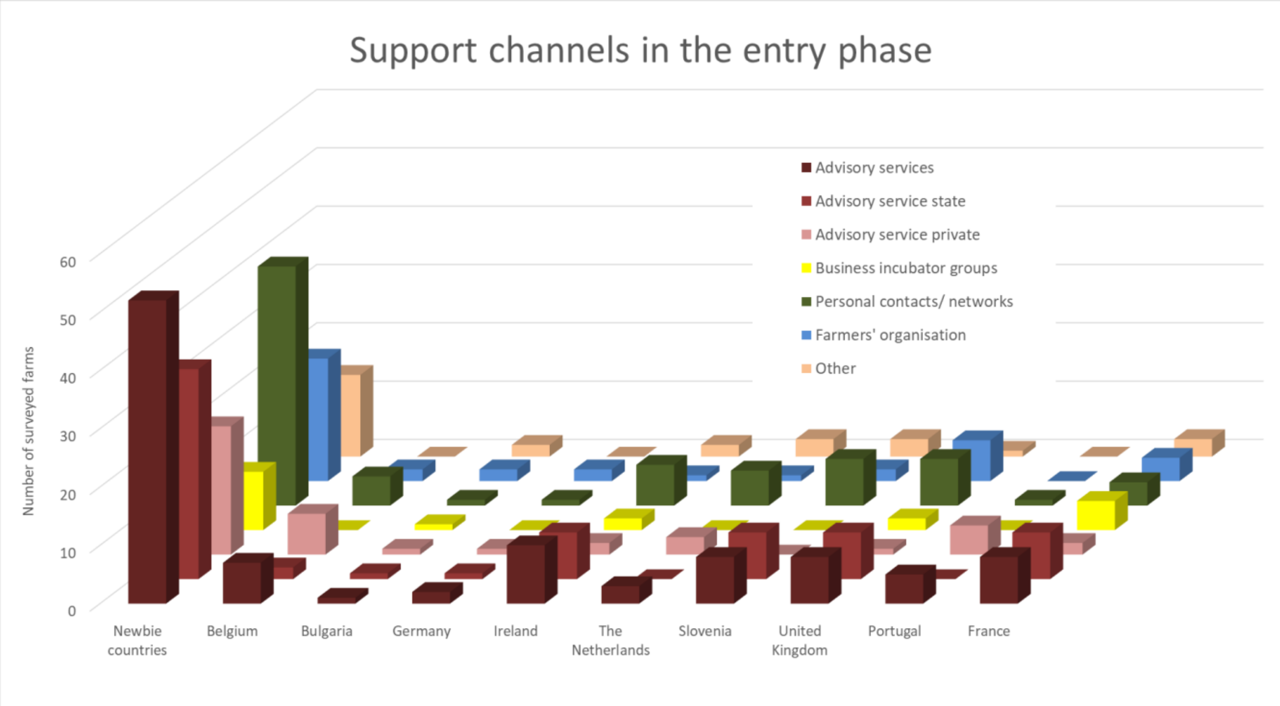


Figure 5: Support channels in newbies' entry phase

The most important financial sources are: own savings, bank loans and money from the family respectively (s. Figure 6). The possibilities of crowdfunding and share farming play only a minor role within the sample; some crowdfunding took place in The Netherlands and Slovenia and share farming in the UK.

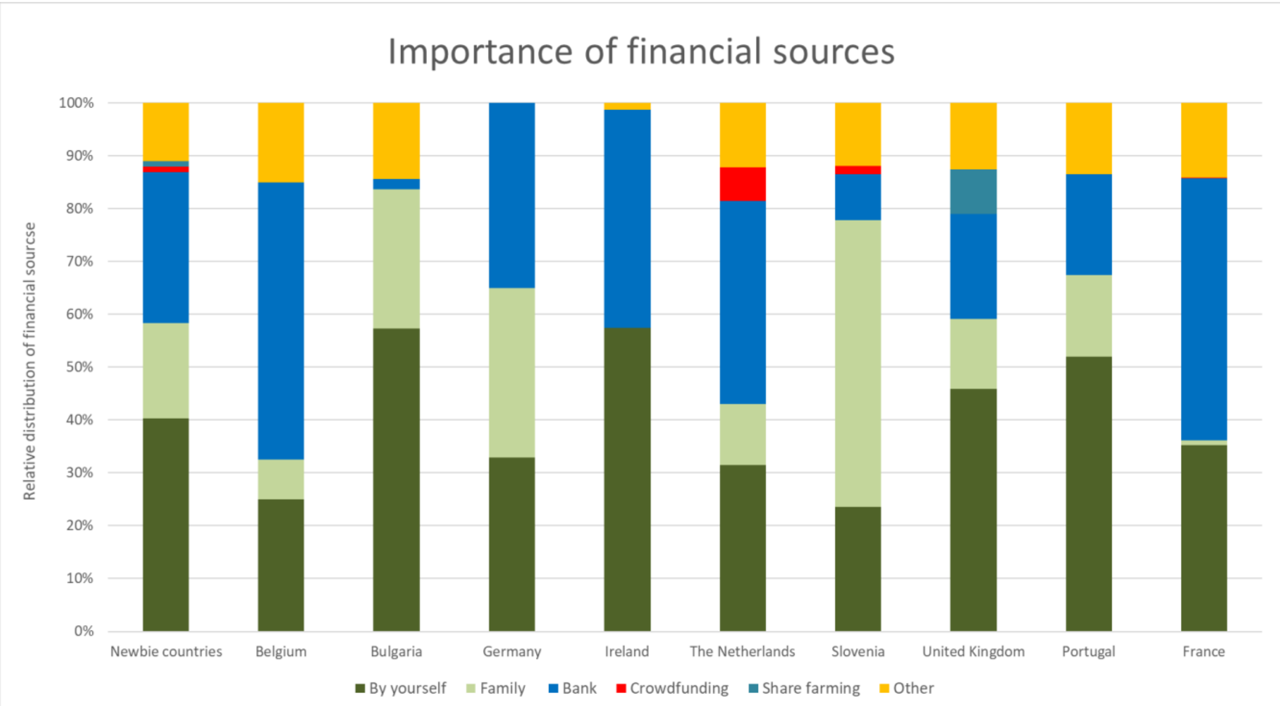


Figure 6: Financial sources and relative importance per country

Financial support from the family plays the major role in Slovenia and also a relevant role in Bulgaria, while own financial resources and bank loans are the two most important components for all other Newbie partner countries. Furthermore, some new entrants highlight under the category "others" different public support measures for (young) farmers – especially targeted EU CAP support for young farmers.

Farm characteristics

About three quarters of the interviewed new entrants run their farm full-time, while about 20 newbies run their farm business part-time. In all countries the number of analysed full-time farms is larger than the number of part-time farms, which is in compliance with the questionnaire instructions provided to all partners (s. Annex I). Organic farming is – compared to the overall statistics – more commonly practiced by the interviewed farmers were similar in numbers as conventional farms within the sample. While in Germany, The Netherlands, Portugal, and France more interviewed farms run an organic farm, conventional farms are more often interviewed in Belgium, Ireland, and Slovenia. The Bulgarian sample is equally divided into five organic and five conventional new entrant farms. In the UK the new entrants highlight also other operating types, like nature conservation, sustainable, and high ecological farming.

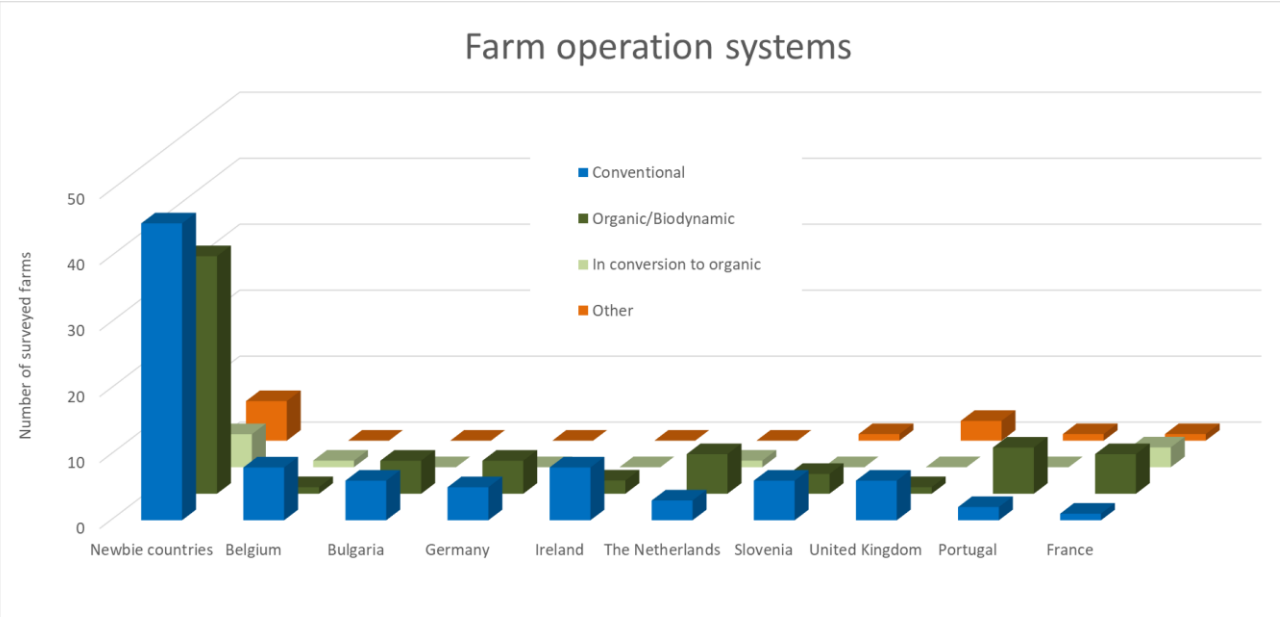


Figure 7: Conventional and organic farming

Figure 8 shows the average workload of new entrants. The bar chart differentiates between full-time farmers, who name an average work-load of around 60 hours/week, and part-time farmers indicating on average per week approximately 20 on-farm plus 30 off-farm working hours.

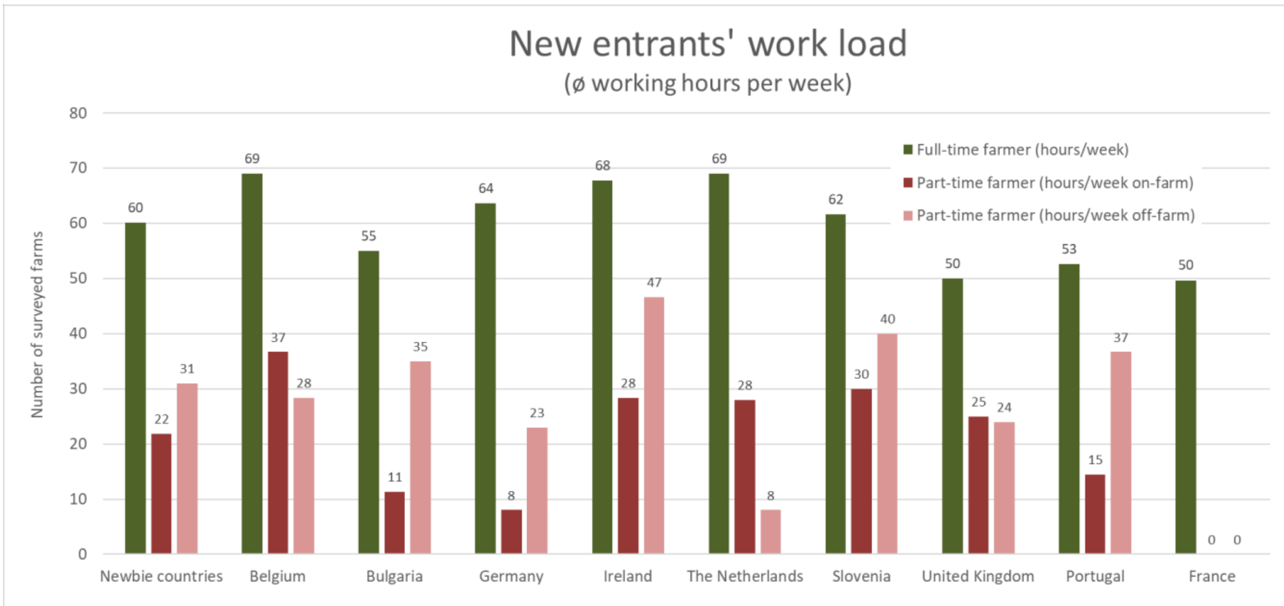


Figure 8: New entrants' workload: Full-time vs. part-time farming

The average farm size of the interviewed newbies is rather large (>100 ha), but it has to be considered that this average is significantly increased by two large Bulgarian farms, which are operating 3,000 ha each (s. Figure 9). Besides Bulgaria, also the ten case studies from the UK result in a comparable large average farm size of above 100 ha. Some of UK's interviewed new entrants are situated in mountainous regions with large grassland areas and also areas, which are very extensively used, e. g. bog, upland heather or rough ground not suitable for other forms of farming cultivation. Also the farm size of Irish farms is dominated by grassland, while in countries like Belgium, Bulgaria, and Germany cropland plays the major role. The Dutch cases also included a large greenhouse horticulturist of more than 200 ha. Besides agricultural land, woodlands are also part of some newbie farm businesses – especially in Portugal, Slovenia, and the UK. When comparing the farm sizes, it becomes obvious that the farm sizes of existing farms taken over by successors is larger than for new farm businesses (s. Figure 10). This is also the case for all countries, except The Netherlands. Here, it has to be mentioned again that the numbers are skewed by two large-scale Bulgarian farms and one new greenhouse horticulturist in The Netherlands.

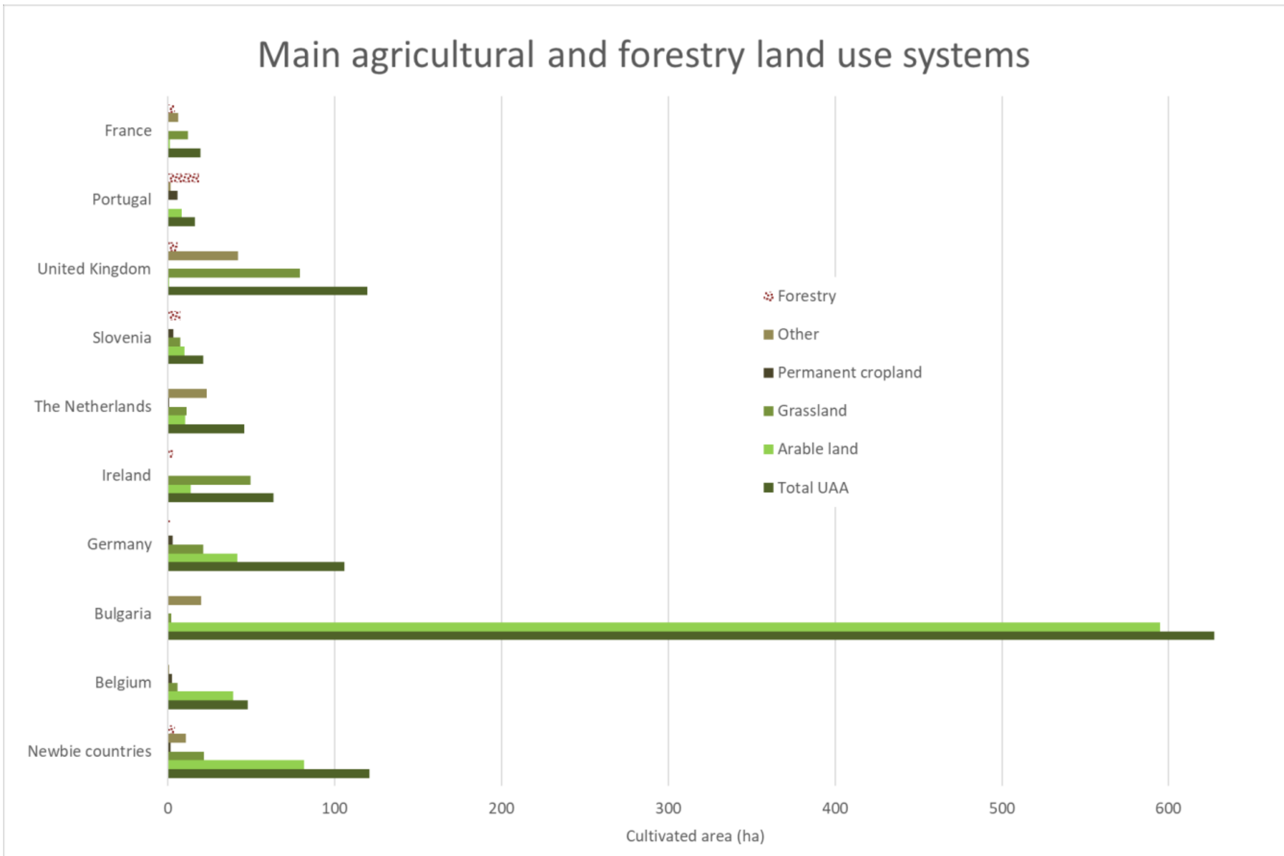


Figure 9: Farm size and main agricultural land use types

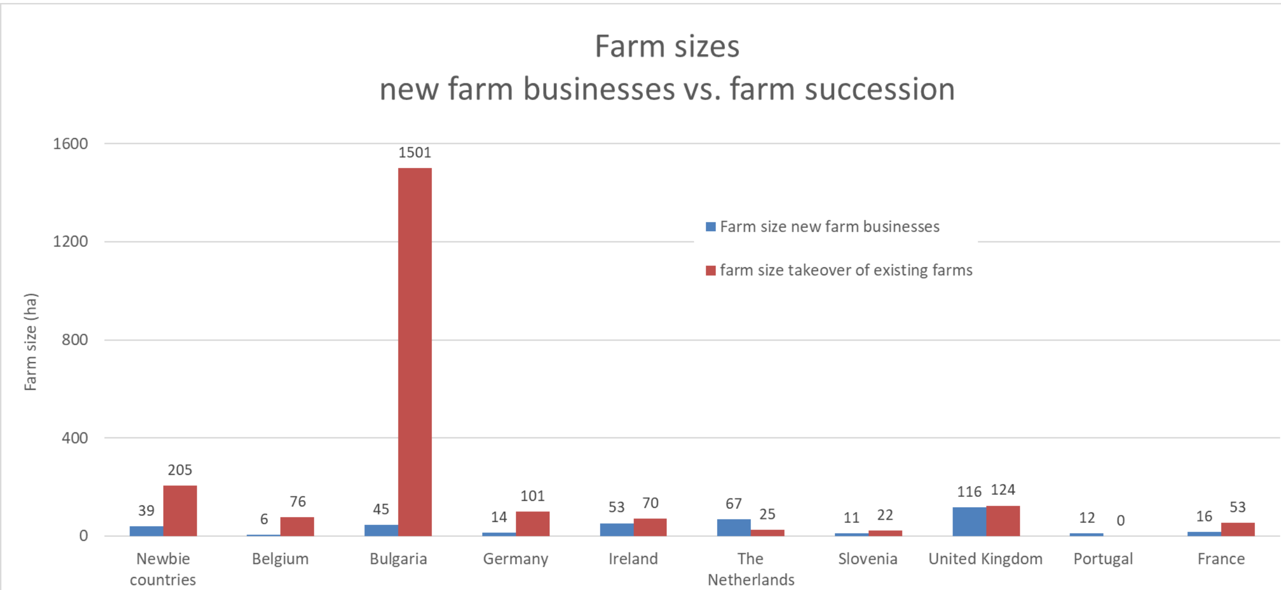


Figure 10: Farm size of new farm businesses compared to existing farms taken over

About three quarters of the interviewed farms own some (or all) of their farmland. Furthermore, about half of the newbies leases land long-term (>5 years) and more than one third short-term (< 5 years). All new entrants interviewed in Slovenia and Bulgaria own at least some of the farmland, while in other countries like the UK, France, and Germany only about half of the farmers own farmland, while the other half is fully dependent on farmland rent contracts with land owners. More than half of the farmland is owned by the Portuguese, Slovenian, Dutch and Irish new entrants, while only very few per cent of the farmland is owned in the French case studies (s. Figure 11). Long-term farmland lease is in most countries prevailing over short-term leasing.

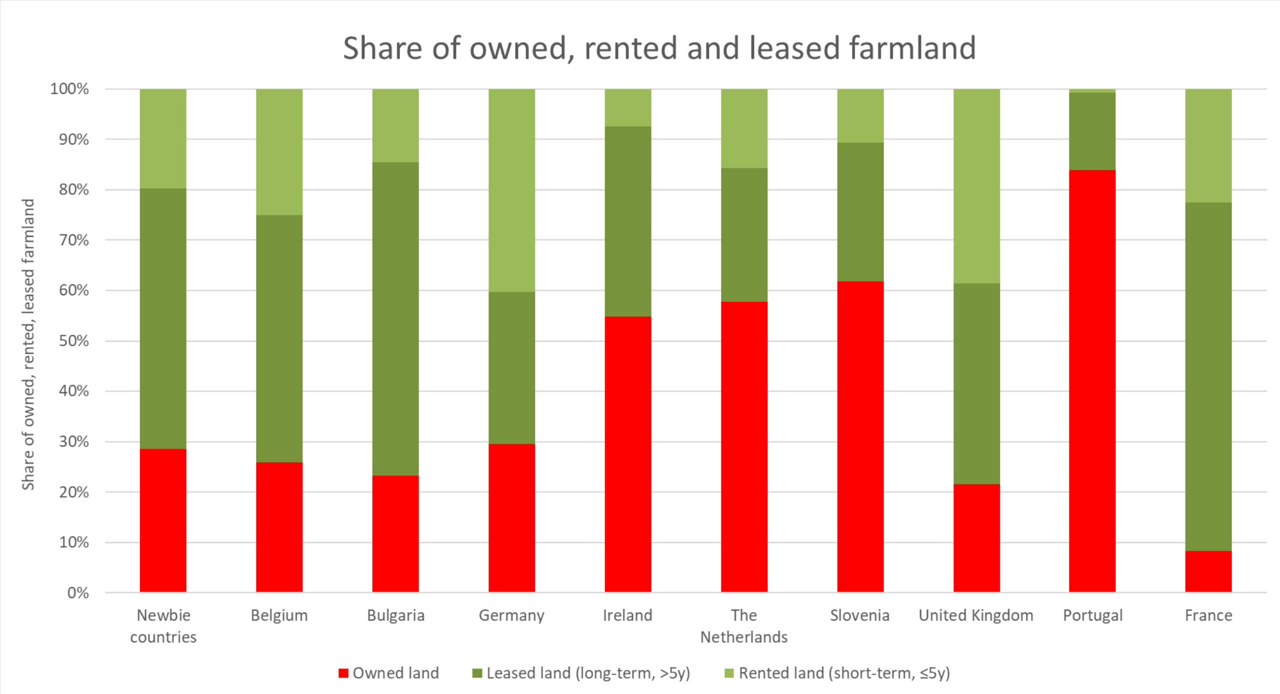


Figure 11: Share of owned as well as long- and short-term leased farmland

The majority of interviewed new entrants keep livestock, especially in the UK (10/10), Slovenia, Ireland, and Germany (8/10 each), while the majority of French and Portuguese new entrants selected for the case study collection do not keep any livestock. In total 30 farms from the case studies do not keep any livestock. The most common livestock was laying hens and sheep followed by beef cattle and dairy cows (s. Figures 12 and 13). While some livestock is kept by new entrants from several Newbie partner countries, e. g. laying hens, horses, and dairy cows, sows and poultry fattening are only present in two/three countries' sub-samples.

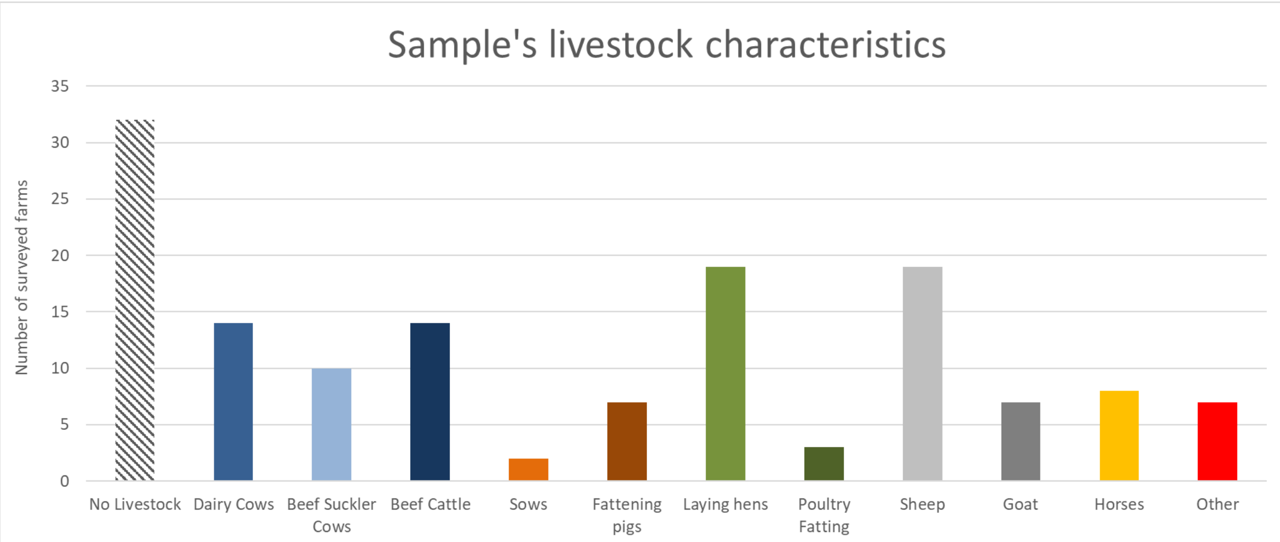


Figure 12: Number of farms keeping livestock grouped into livestock categories

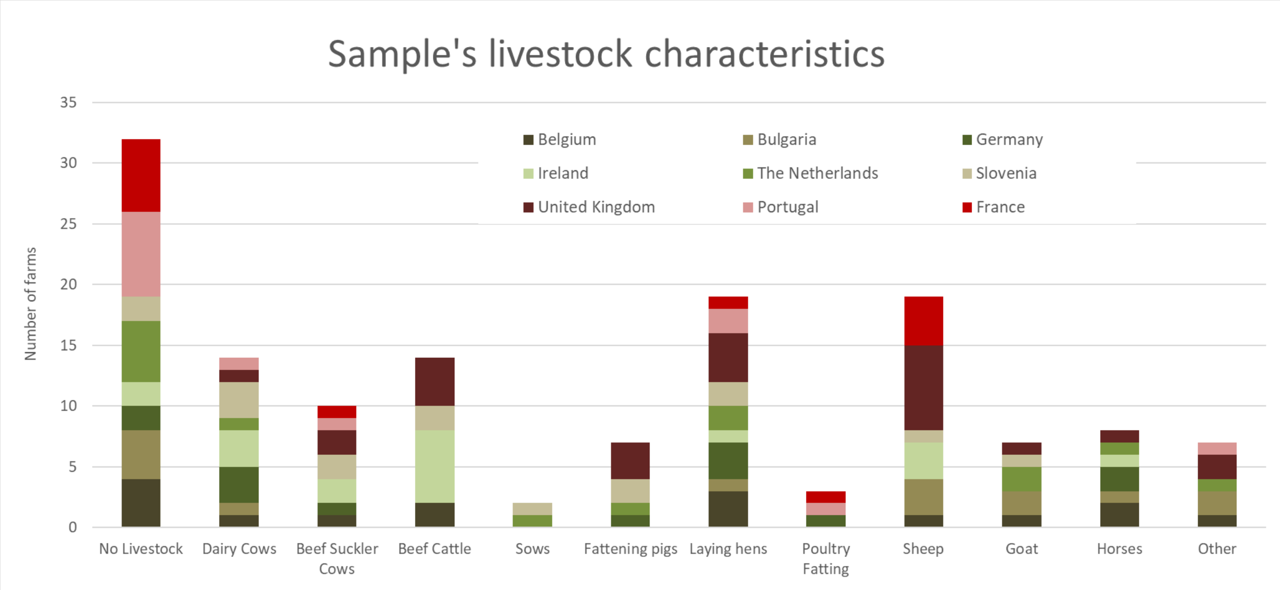


Figure 13: Sample's livestock characteristics depending on country and livestock category

Processing, marketing, and on-farm non-agricultural diversification

On-farm food processing is a frequently exploited business pillar of new entrants (s. Figure 14). This is especially true for Slovenia and Portugal, where the majority of case studies conducted on-farm food processing. Also in the Netherlands, France, UK, Belgium, and Bulgaria some of the ten case studies processed food on-farm.

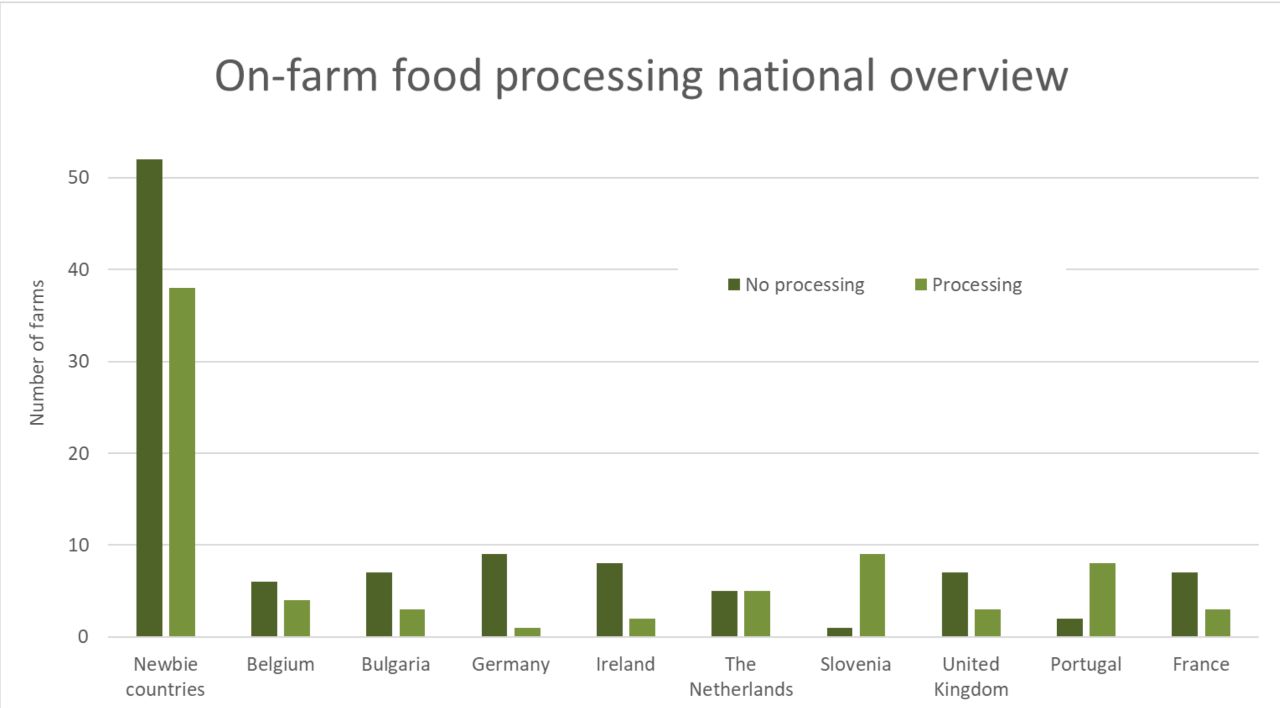


Figure 14: Presence of on-farm food processing

Among the German case studies only one new entrant processed vegetables on-farm, while food processing covers more than one product among the other countries' samples (s. Figure 15). Slovenian new entrants process on-farm meat, milk, cereals, vegetables/fruits, wine, and other products – in the Slovenian case pumpkins, herbs, and hemp. The Belgian and Portuguese samples process also a variety of products on-farm, including in Portugal acorns, herbs, and olives. Milk and vegetable/fruit processing occurs in most

Newbie countries (s. Figures 15 and 16). The share of processing conducted on farm differs depending on the primary produce. The only vineyard (Slovenia) of the case study collection, processes all the wine on-farm. Milk (ca. 70%), meat (ca. 60%), vegetable/fruit (ca. 50%), and cereal (ca. 30%) products are also processed on-farm to noteworthy extents.

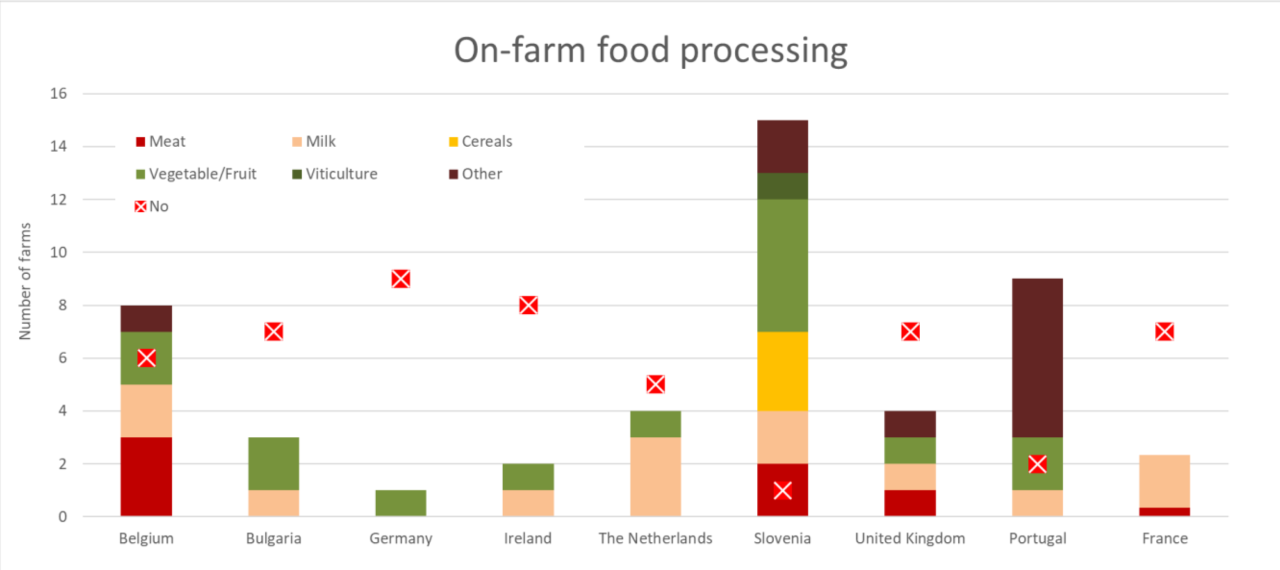


Figure 15: On-farm food processing per country and products

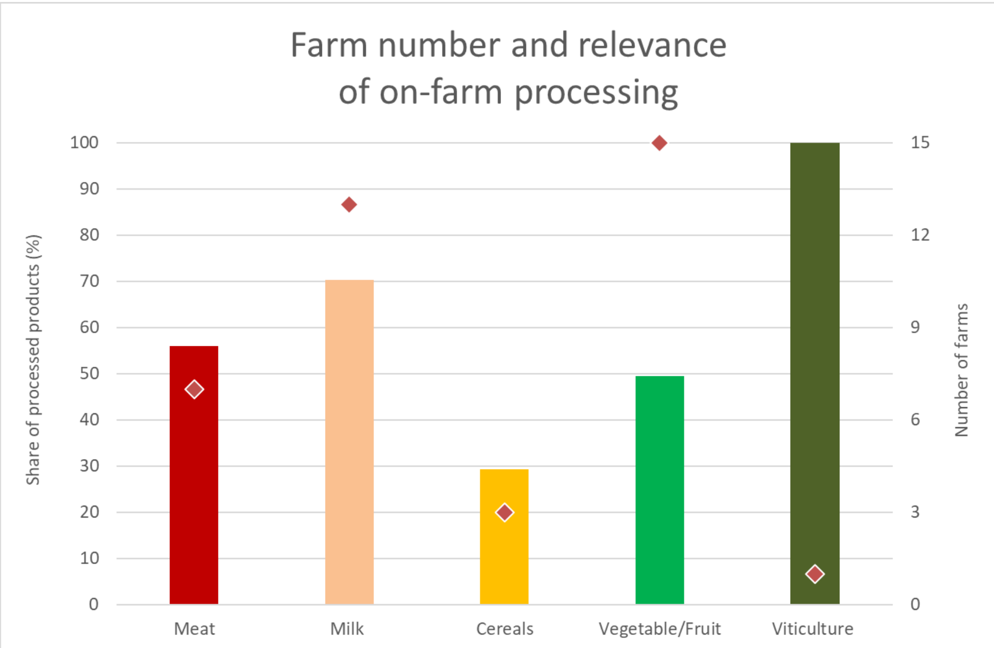


Figure 16: Farm number and relevance of on-farm processing

In line with the findings of food-processing on-farm, direct sale and other short value chains are an important strategy of most farms (s. Figure 17). In eight of the nine countries the majority of farmers sell directly and/or via short chains, only in Ireland did long-value chains dominate in the national sample. All the interviewed farms from The Netherlands, Slovenia, and Portugal market directly and/or via short chains. In many cases direct sale and short value chains are both exploited.

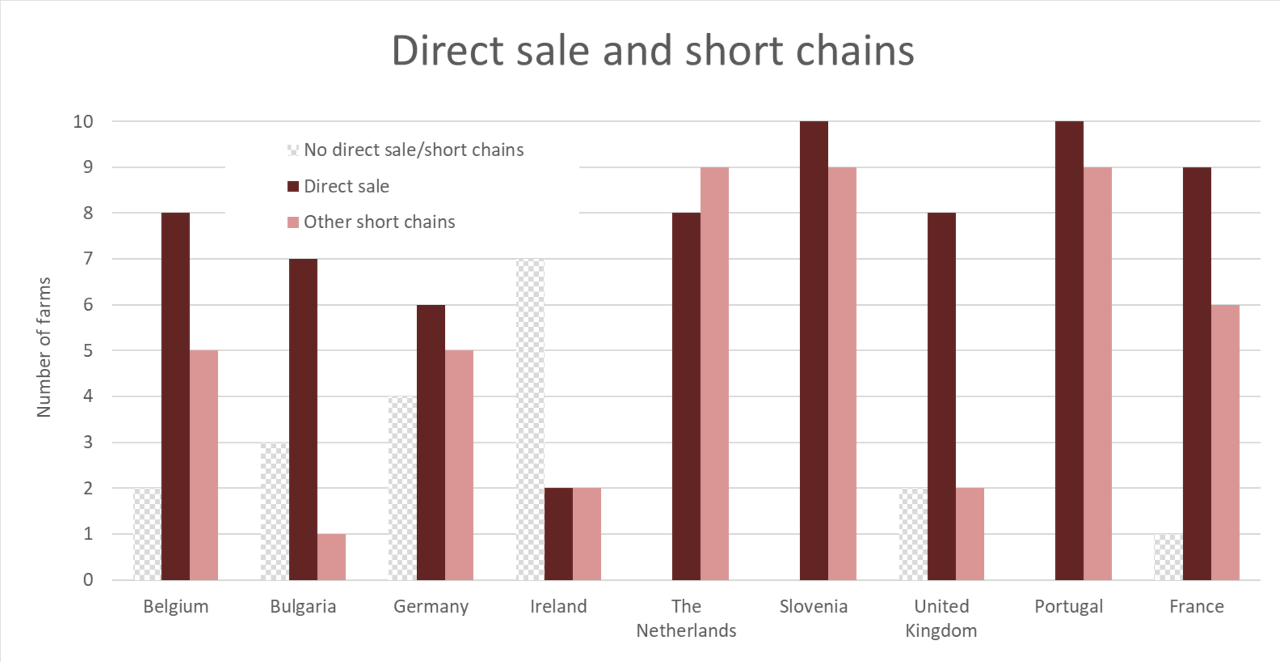


Figure 17: Newbies' direct sale and short chains

When summarizing all case studies, on-farm shops are the most common type of direct sale followed by delivery services/box schemes and farmer markets (s. Figure 18). Furthermore, online home delivery, self-pick fields, and food assemblies are also applied, while sale booths (at street, etc.) and vending machines are less frequently used. Direct sale via on-farm shops are very common in the case study collections from Portugal, Slovenia, The Netherlands, Belgium, and Germany. (Home) delivery services and box schemes are mainly used by British, Slovenian, and Portuguese new entrants. Self-pick is the most often named type of direct sale in Bulgaria and food assemblies in France and Belgium.

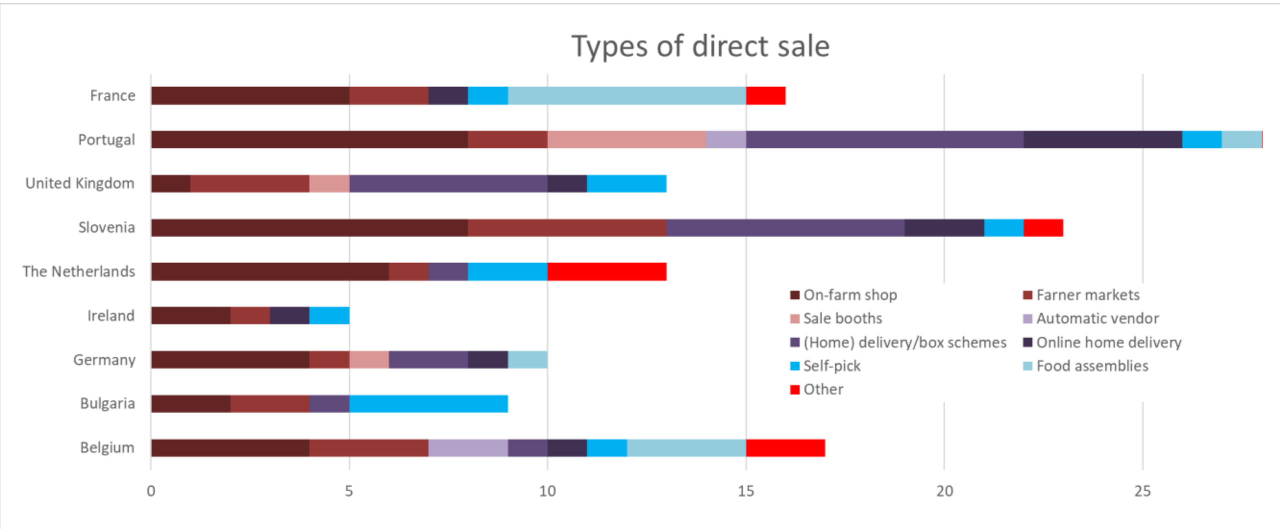


Figure 18: Types of direct sale per country

Besides direct sales (s. Figure 18), new entrants from Slovenia and Portugal also use multiple short chains (s. Figure 19). New entrants from the UK, Ireland, and Bulgaria make little use of short value chains. Local shops offer short chain opportunities, which are especially used by the interviewed new entrants from Slovenia, Portugal, and The Netherlands. Gastronomy and canteens, supermarkets with regional food sale, and nearby farm shops are also exploited to a certain extent – supermarkets with regional food sale especially in Slovenia, Portugal, and Germany. Short chain marketing to gastronomies is most often named from Belgian, Portuguese, Slovenian, and Dutch newbies.

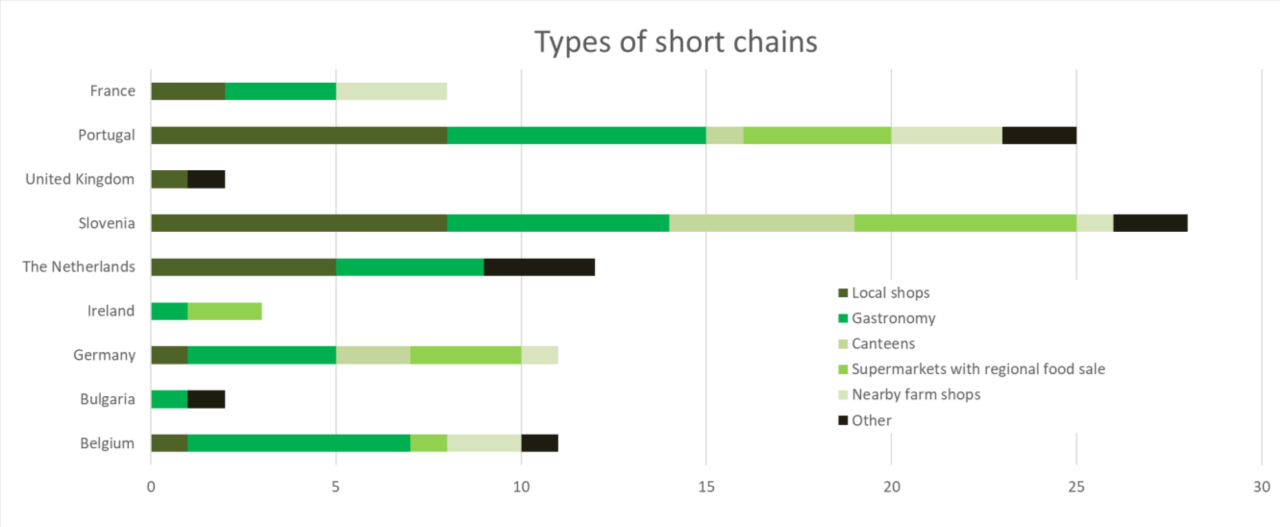


Figure 19: Types of short chains per country

Besides selling food directly, or via short chains (including processing), on-farm non-agricultural diversification measures play another important business area for new entrants. Twenty-five interviewed new entrants offer social/pedagogical services followed by agri-tourism and renewable energy with 19 farms each. The Dutch sample had the most farmers offering agri-tourism (5 farms) and social/pedagogical services (8 farms). Six Belgian farms incorporate social/pedagogical and another six Belgian farms renewable energies into their farm business concept. Gastronomy services are the most often used agri-tourism services offered on-farm (s. Figure 21). Under the group of social/pedagogical services, educational services, in most cases targeted for children, are very present (s. Figure 22). Two care farms, one from The Netherlands and one from Belgium, are also part of the case study collection. The exploitation of renewable energies of new entrants focuses on solar panels, while wind and biomass occurs infrequently.

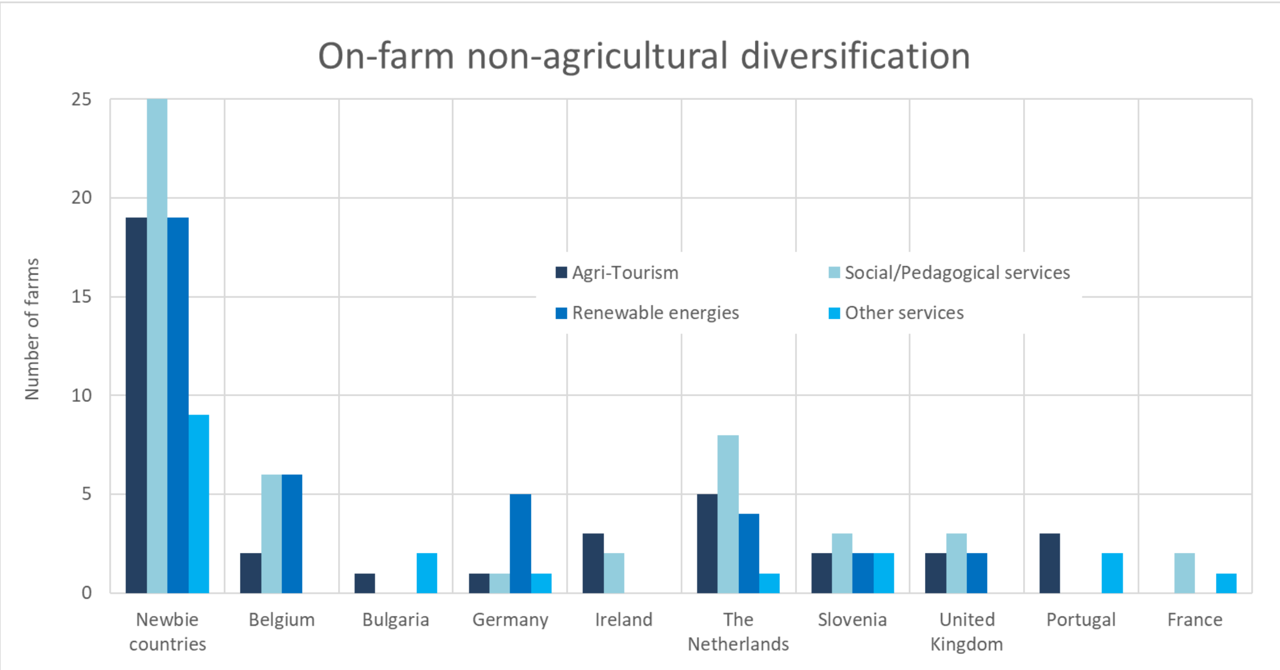


Figure 20: Overview of classified non-agricultural diversification measures

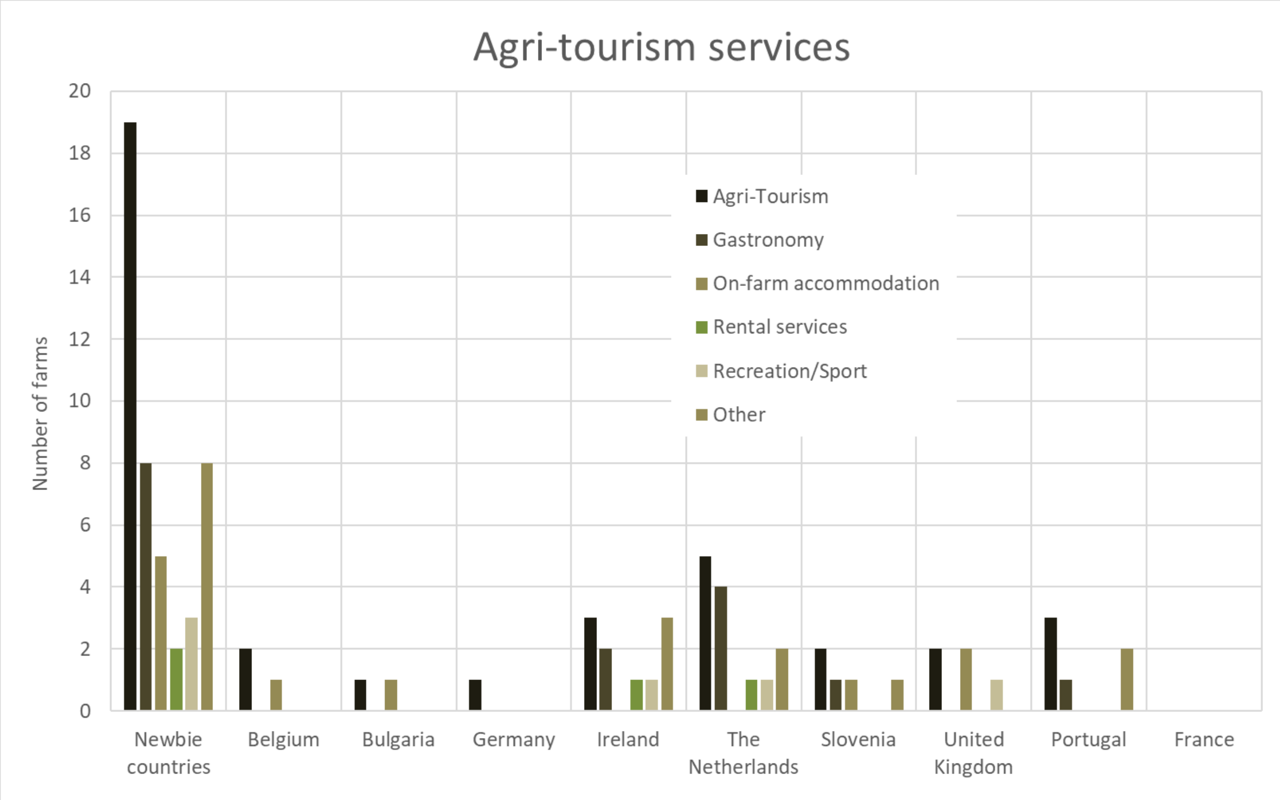


Figure 21: Insights into agri-tourism services

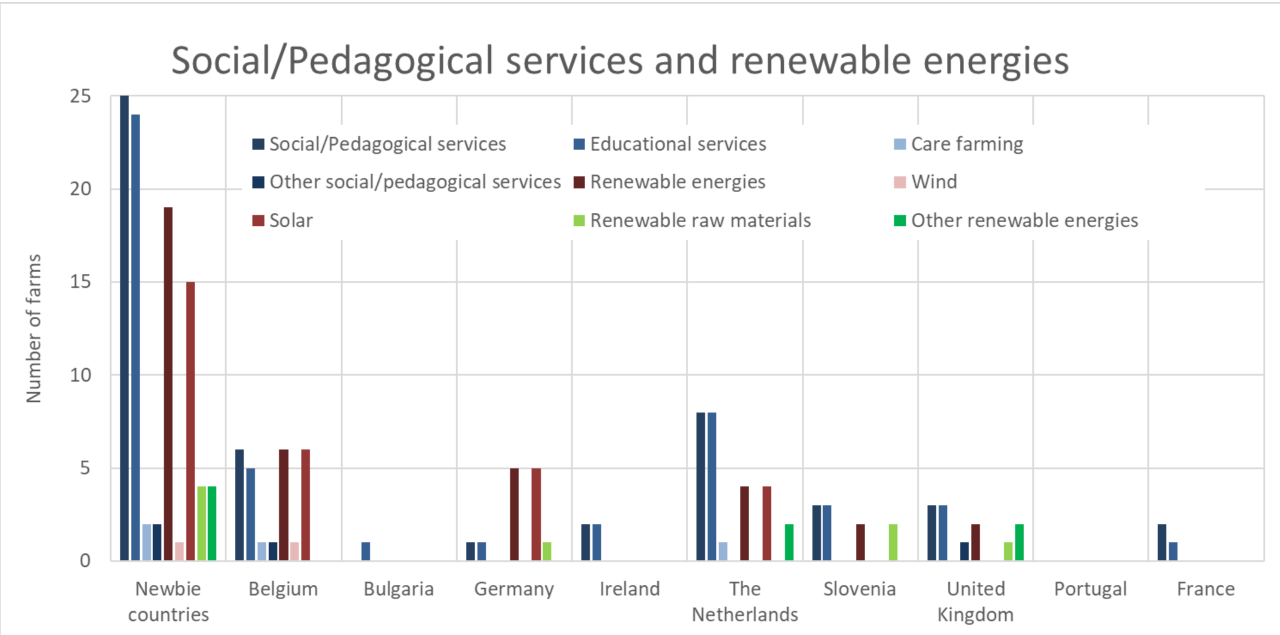


Figure 22: Insights into social/pedagogical services and renewable energies

Main business pillars

The interviewees have been asked to nominate the three most important farm business pillars (s. Figure 23). Food production ranks first followed by direct/short chain product marketing and processing. Summarizing, these three farm business pillars account for ca. 75% of all named important farm business pillars. They are all directly linked to products, while the other pillars cover further aspects, like environment, education, research and development. Environment plays quite a role in Ireland (2nd after food production) and UK (2nd after food production together with direct sale/short chains). Education services were provided by several farms in The Netherlands, but was a relatively small contributor to total farm revenue.

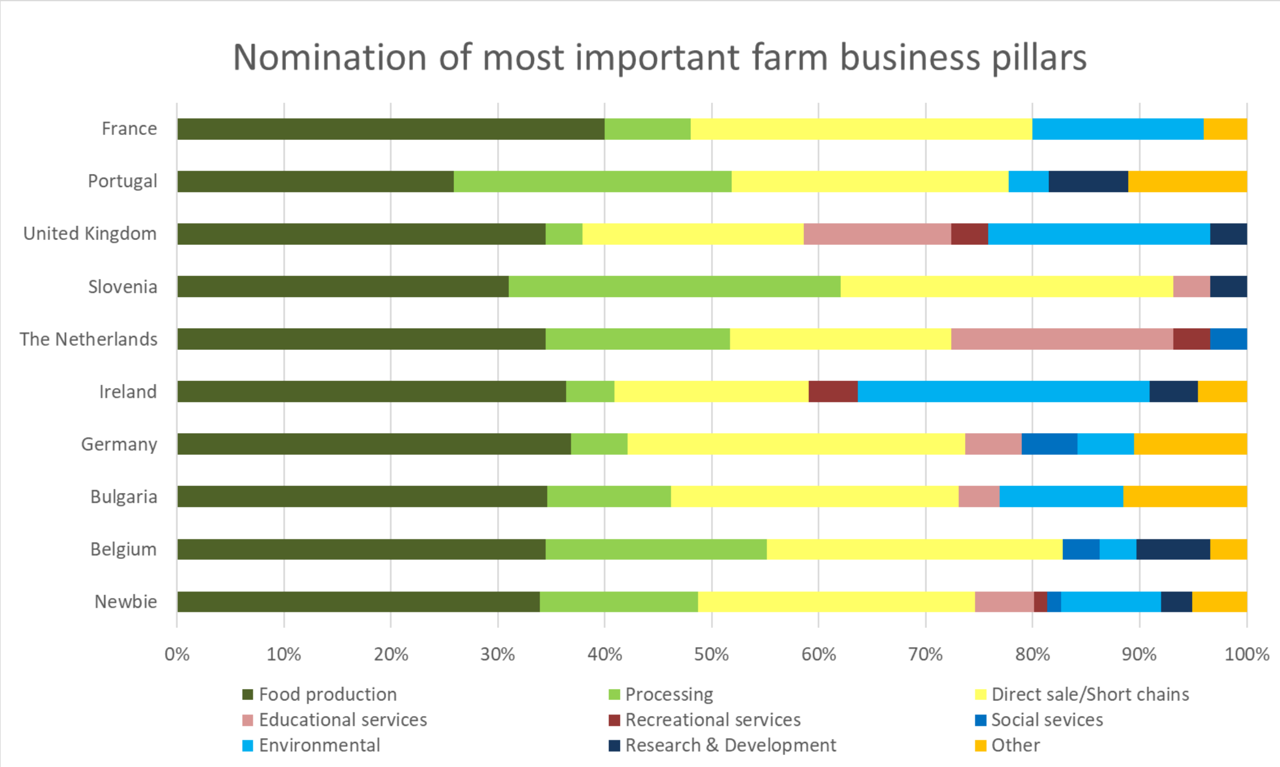


Figure 23: Nomination of the three most important business pillars. The number of nominations are calculated without consideration of rankings.

Apart from only asking for and naming of the farm business pillars, the questionnaire asked also for a ranking from one (highest ranking) to three (s. Figure 24). Similar to the overall nomination rate, food production reaches the highest rank.

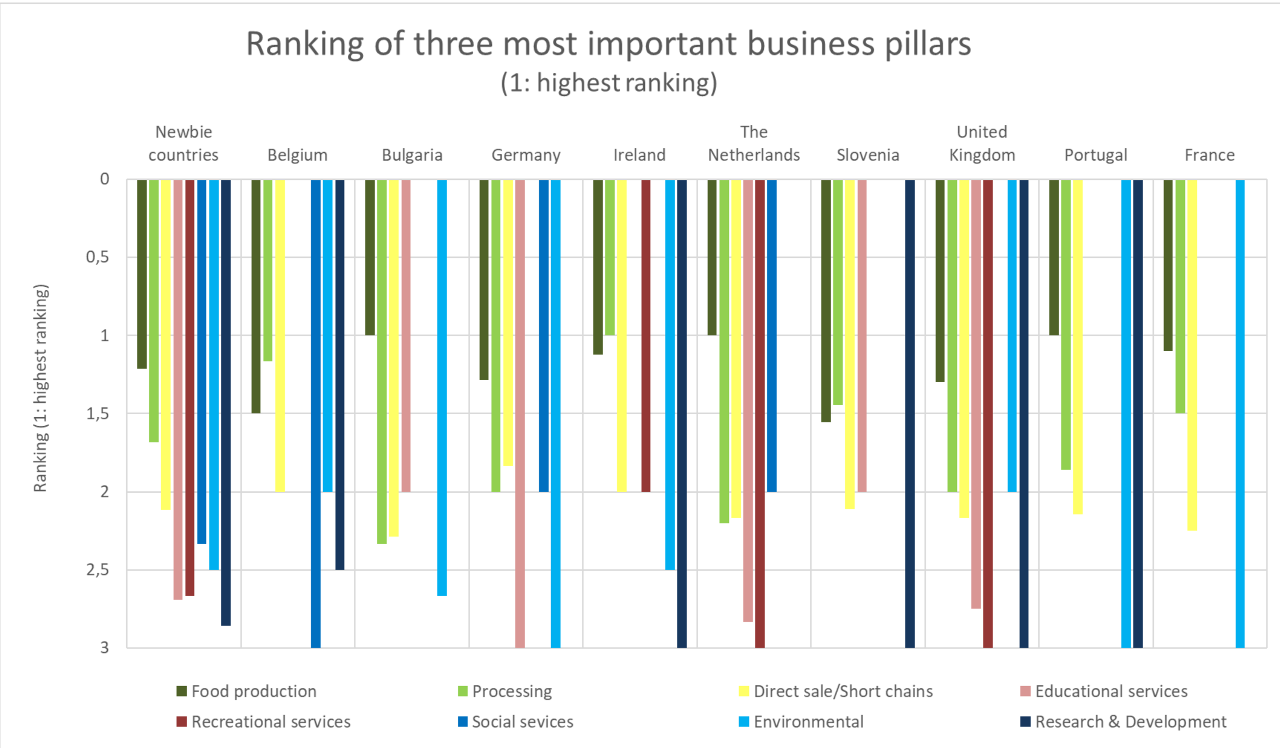


Figure 24: Ranking of farm business pillars

The above named production, processing, marketing, and non-agricultural diversification measures of interviewed Newbies results in a high ratio of new entrants, who name a Unique Selling Proposition (USP) for their own farm. Nearly four fifths of the farmers had a USP whilst in some countries' 100% of the case studies had a USP (Belgium, The Netherlands, and UK).

Customer segments

The final consumers are most often named as the new entrants' key customer segment (s. Figure 25). This goes hand in hand with a large number of direct sales as well as farms offering on-farm non-agricultural diversification measures. Regional businesses, wholesaler, and retailers are less common, while cooperatives and regional processors are not named that much as relevant customer segments for the new entrant farms. As already presented in Figure 17, the number of Irish farms marketing directly is below the other countries' shares, which provides the reason for this country's low consumer value in the customer segment bar chart. The ranking of customer segments shows the highest importance for consumers (s. Figure 26).

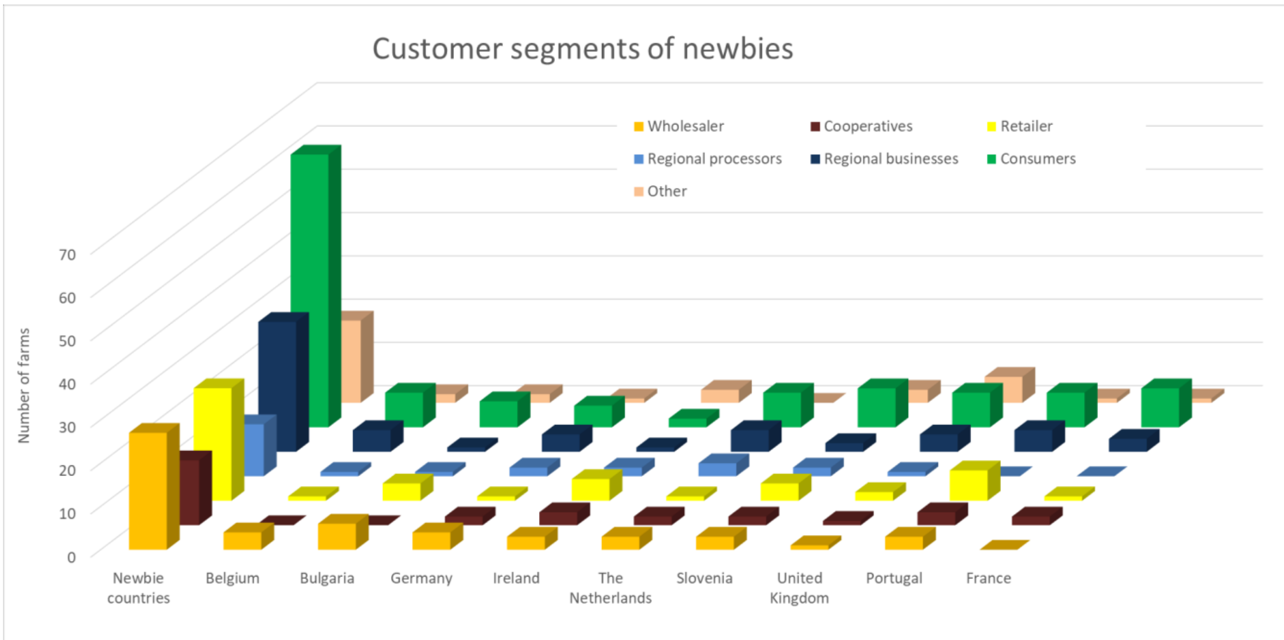


Figure 25: Key customer segments of new entrants per country

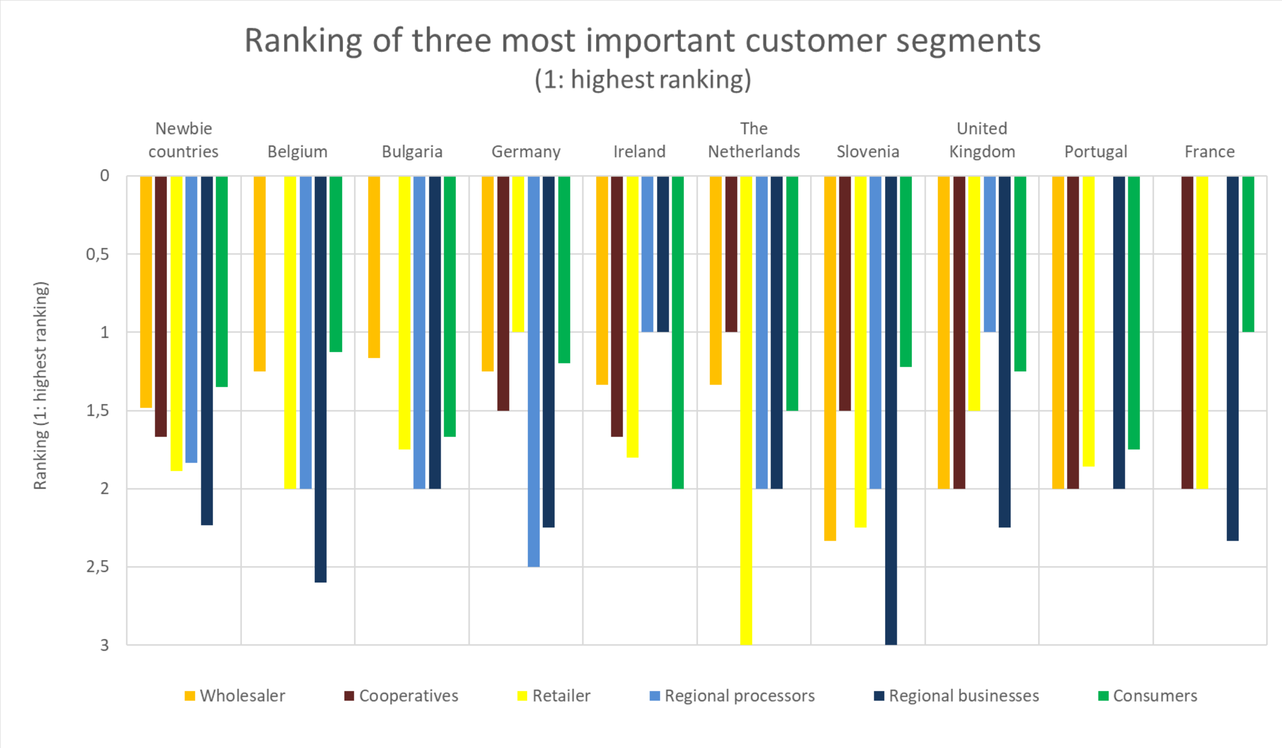


Figure 26: Ranking of customer segments

New entrants' advertisement channels are diverse and depend on the farms business pillars (s. Figure 27). In general, word-of-mouth, social media, and internet website are the most frequently used channels. Leaflets/flyers and newspapers are less important. Some farms do not use any advertisement, especially those in Ireland and Germany. The lack of public relations on Irish farms is logical given the small number of Irish farms that sell directly or via short chains.

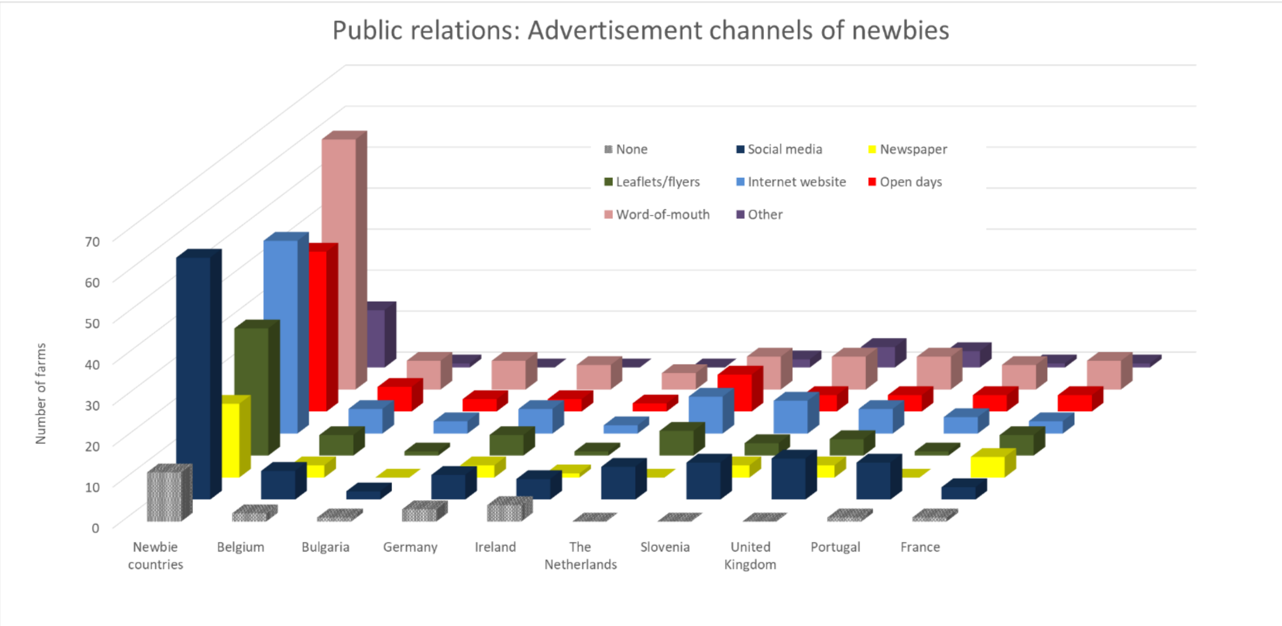


Figure 27: Advertisement channels of new entrants into farming

Gaining information and inspiration: networks, media, and organisations

The new entrants gathered information from various fields in order to gain inspiration for running and developing their farm business. They come from several sources including; networks, media, and organisations. The most often named ones are associations, working groups/networks, printed sources, and social media. German newbies most frequently make use of professional magazines to search for information. Yet, they also name the growing relevance of social media in this regard. Furthermore, the exchange with others farmers and networks are also named as key sources for information access. The Irish new entrants name Teagasc as a key resource to receive information and inspiration, but also regional and thematic working groups, social media, journals, and private advisers. Portuguese newbies highlight the importance of social media and internet in general. Furthermore, they name producer organisations, books, courses, training offers, associations, and the University of Evora (many case studies are situated in the area around Evora). Bulgarian new entrants name working groups, organisations, and associations, but also social media with rising importance. The UK case studies name a very diverse set of sources. In addition to those already mentioned; conferences and agricultural schools were also used. Belgian new entrants also name the organisation for young people in agriculture, the “Groene Kring”. Whilst Slovenian interviewees also named an agricultural TV show as an important source of information.

CAP payments, fixed and variable costs

Around 80% of the interviewed case studies receive direct payments under the EU Common Agricultural Policy scheme. All Bulgarian and Slovenian newbies indicate the receipt of public money, while only half of the UK farms name this revenue stream. Furthermore, the large majority of farmers that rented farmland and receiving EU CAP direct payments were able to keep the subsidies (80%), while some have to pass the subsidies on to the land owner.

The costs to start or take over and run a farm include fixed and variable costs. Important fixed costs for the majority of new entrant farms are: machinery, land, buildings, and financing (s. Figure 28).

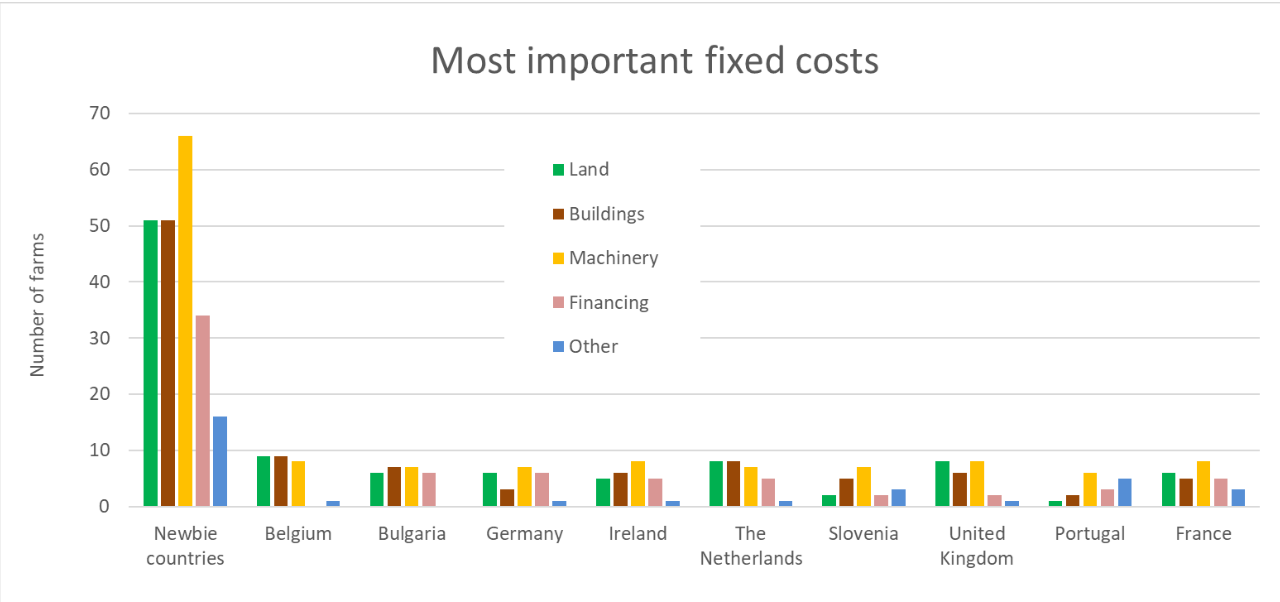


Figure 28: Fixed costs

The new entrants, who nominate financing as a key fixed cost, prioritise its importance, so that financing reaches the highest ranking (s. Figure 29). This highest rank is especially pronounced in The Netherlands, Portugal, and Bulgaria, while land is for example reaching the highest rank in the UK, Germany, and Belgium.

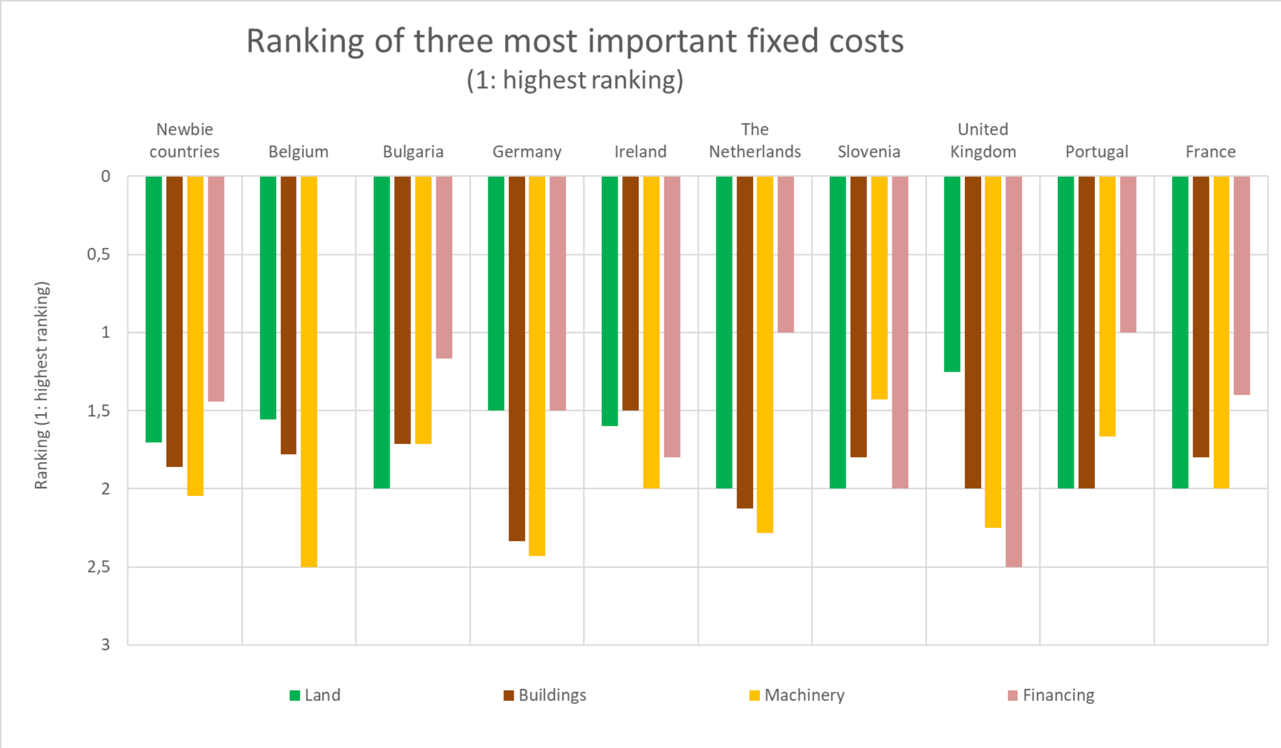


Figure 29: Ranking of fixed costs

When having a closer look at the most relevant variable costs, the production inputs and labour costs are highlighted (s. Figure 30). Variable costs for livestock and contractors are following third and fourth. Ranking differences between the variable costs labour, production inputs, contractors, and livestock are not significant, but marketing costs are ranked low (s. Figure 31).

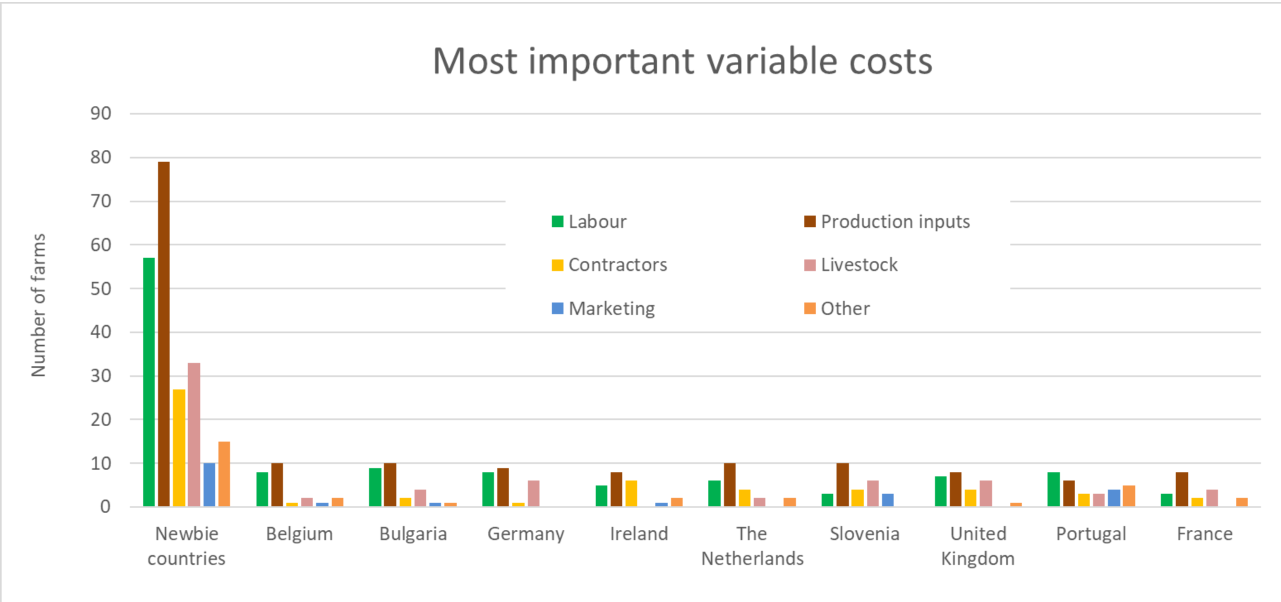


Figure 30: Variable costs

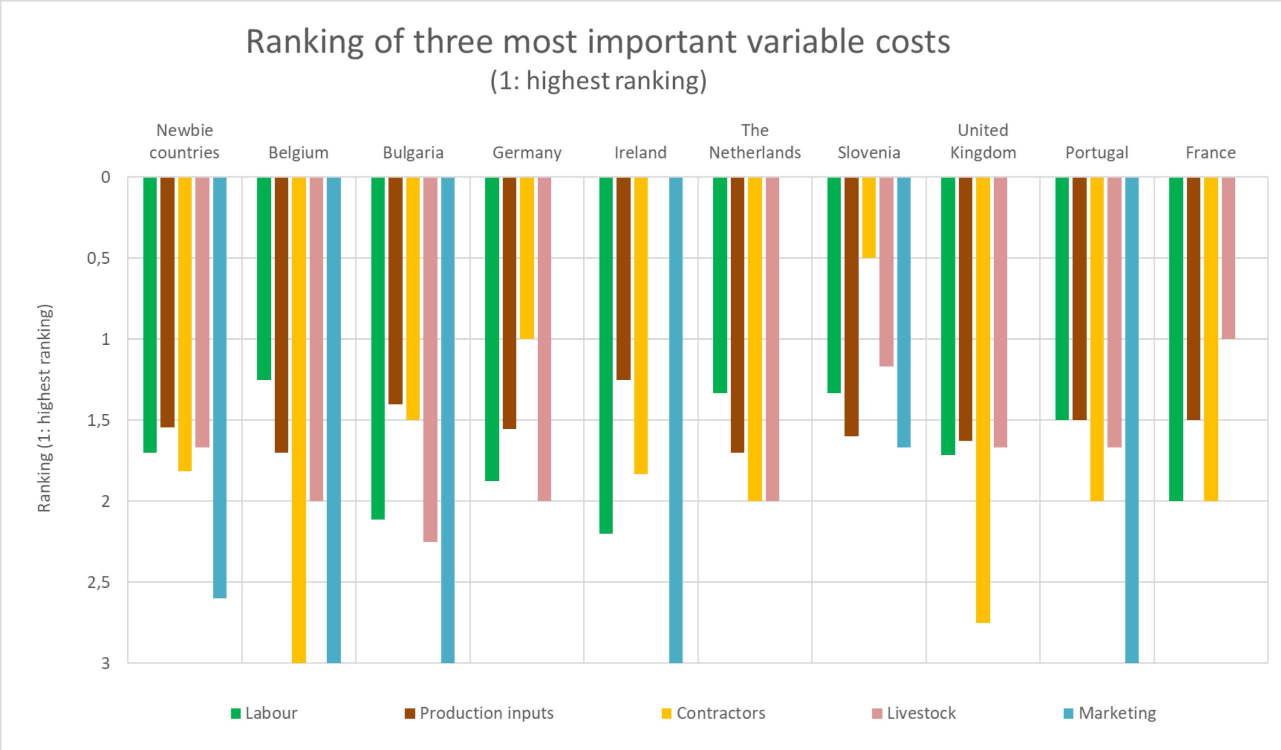


Figure 31: Ranking of variable costs

Key strengths and success factors

The key strengths of new entrants named in the partner countries cover very different fields; mainly related to production, marketing, and services, personal soft skills, expertise in agricultural production, location, and support. USPs are emphasized as a key strength (Belgium, Bulgaria). Product-related strengths are named several times: high quality products including organic production (Bulgaria), suitable site-conditions for production (Ireland), unique products and ecological production (Portugal), high quality and innovative products (Slovenia), and good quality products (UK). Linked to the production, many new entrants name direct relationships and good contacts to customers as a key strength: transparency and direct marketing (Germany), good relationships with customers (Netherlands), differentiation (Portugal), direct contact to customers (Slovenia), own marketing (UK), and short value chains (Belgium). The farm location goes hand in hand with short chain marketing, which is named several times (Ireland, Netherlands, Portugal). Furthermore, diversification can be used to distribute the financial risks (UK, Slovenia, Netherlands, Germany). Key strengths mentioned by new entrants included: knowledge, good education, and experience in farming (Bulgaria, Ireland, Netherlands), flexibility (Germany, Slovenia) and family support (Bulgaria, Netherlands), networks (Ireland), innovations (Portugal), new technologies (Bulgaria) as well as the avoidance of large investments and cost minimization, e. g. through automation (Belgium).

The most common success factors have several overlaps with the previously listed key strengths. Newbies' skills (good education, knowledge, experiences in farming) are named to be important success factors in Belgium, Germany, and The Netherlands. Additionally, personal soft skills are another key success factor. They cover self-motivation and self-confidence and the ability to listen and learn (UK), self-confidence, flexibility (Slovenia), personality and open communicative character (Portugal). These skills together with well-functioning networks are especially important for exploiting short chain marketing (Belgium, Bulgaria, Germany, Netherlands, Portugal). The success factor of many Dutch entrants was to tie the whole chain on-farm. Portuguese new entrants name the exploitation of market potentials and niches a key success factor. Success demands also the willingness to work lots, which can go far beyond 9 to 5 desk jobs (Germany, UK). This willingness should be merged with fun to work on-farm and for the own farm business success and development (Slovenia). The willingness to take risks is raised from Bulgarian and Irish newbies. The location (Belgium, Netherlands, Slovenia), family support and also support from wider networks (neighbours, friends) (Germany, Slovenia), external support (Ireland), innovation (Portugal), and long-sightedness (Netherlands) are also named.

Weaknesses and key hurdles

The main weaknesses named by the 90 Newbie case studies are high workload, limited access to key resources, often land and financial ones, bureaucracy, and lack of agricultural expertise. High workload with (too) little leisure time (missing work-life-balance) is highlighted by several newbies in Belgium, Ireland, and UK. Bureaucracy is named several times in Bulgaria and Germany, while a lack of agricultural expertise and experience is mentioned in Portugal, Slovenia, and UK. Further weaknesses include; access to land (Germany, Belgium, Slovenia), reliable labour (Bulgaria, Slovenia), and financial resources (Germany, Bulgaria, Netherlands, Portugal, Slovenia, and UK). With regard to financial issues, Bulgarian newbies focus on price pressure due to international competition, Irish newbies consider themselves as being weak when being dependent from dairies, Dutch interviewees also see financial pressures and dependency on the farm manager as new entrants are often comparatively small and do not have the financial resources to hire someone. UK new entrants complain about missing long-term lease options, while Bulgarian newbies see a lack of new technologies. Furthermore, the Portuguese, Slovenian, and UK case studies name site-specific weaknesses, like extreme weather events.

The key hurdles are linked to the weaknesses that farmers mentioned. Access to land is named as a key hurdles by Belgian, Bulgarian, Slovenian, UK, and German new entrants into farming. The most diverse list of hurdles occurs in Bulgaria. Apart from access to land, they name financial barriers, missing state-of-the-art technologies, bureaucratic problems, continuous legislative changes, competition with large-scale producers and distributors, poor rural infrastructure, and a limited and unqualified labour market. Financial constraints are also listed in Belgium – especially for the starting phase -, Germany, Ireland (*hard to earn a viable income*), The Netherlands, Slovenia, and UK. Lack of agricultural knowledge (Belgium, Ireland, Netherlands, Slovenia, and UK), work overload (Belgium, Slovenia), bureaucracy (Germany, Netherlands) and building permission (UK). Hurdles, like lack of support and labour (Ireland), markets and machinery (Slovenia), (unprofitable) small farm structures (UK), and weather risks (UK) are named less frequently.

The Economic performance and farm income

The interviewed new entrants assess their economic performance on a range from 0 (very bad economic situation) to 100 (very good economic situation) as above 60 points (s. Figure 32). However, the economic performance assessment ranges from 15, which is an Irish farm, to 100, which was given by one German newbie. Overall, the highest performances occur for Belgium, The Netherlands, and Germany (nearly 70), while the ten Portuguese new entrants indicate the lowest economic situation (50).

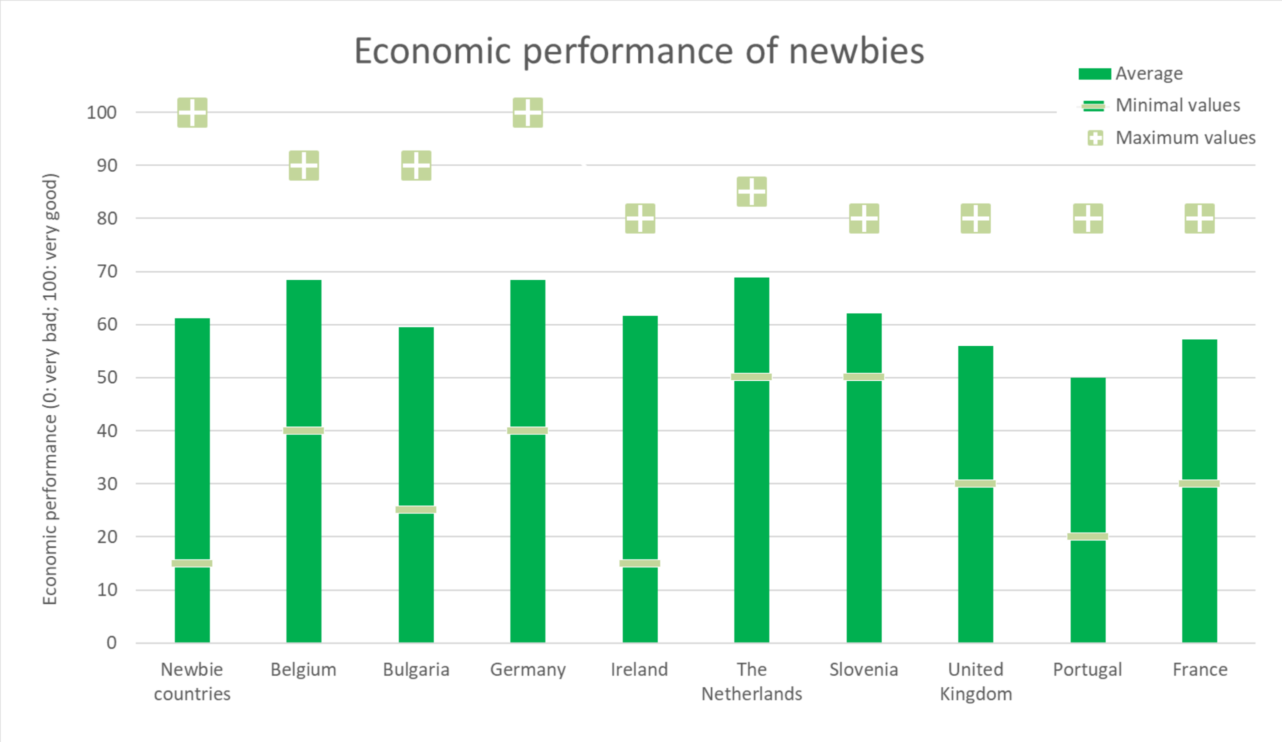


Figure 32: Economic performance of new entrants

Only little differences appear when comparing the economic performance assessment between new farm businesses and takeover of existing farms (s. Figure 33). The differences are rather small and for the whole data set there is only a small tendency to name higher economic performances when taking over an established farm. On the other hand, in some countries such as; Germany, The Netherlands, Ireland, and France, the agricultural start-ups feel they have better economic performance than successors of existing farms. Moreover, there is no significant trend between farm size and economic performance (s. Figure 34). Small farms calculate their economic performance similar to larger farms, so that it can be argued that the farm size is not a determinant of farm business success. The presentation of business success is subjective, because each individual new entrant values business success individually and there might be different perspectives as to what success is.

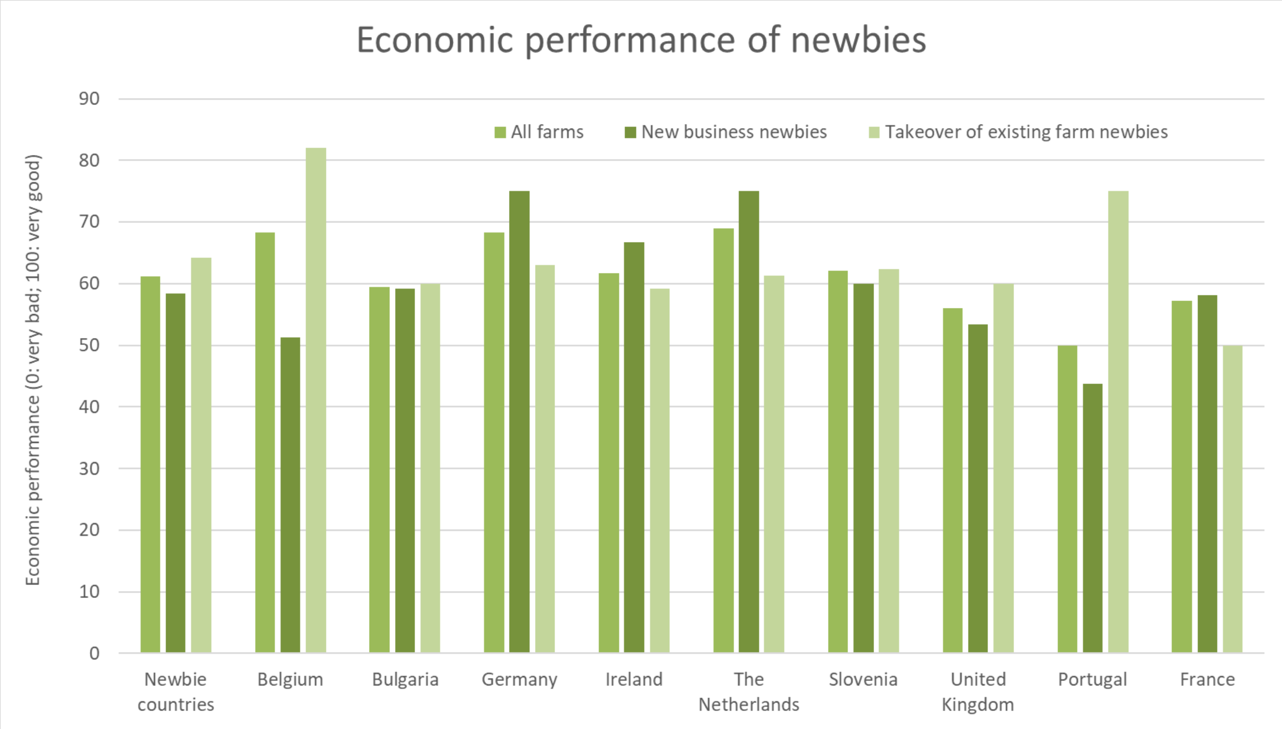


Figure 33: Economic performance of new entrants depending on their path into farming

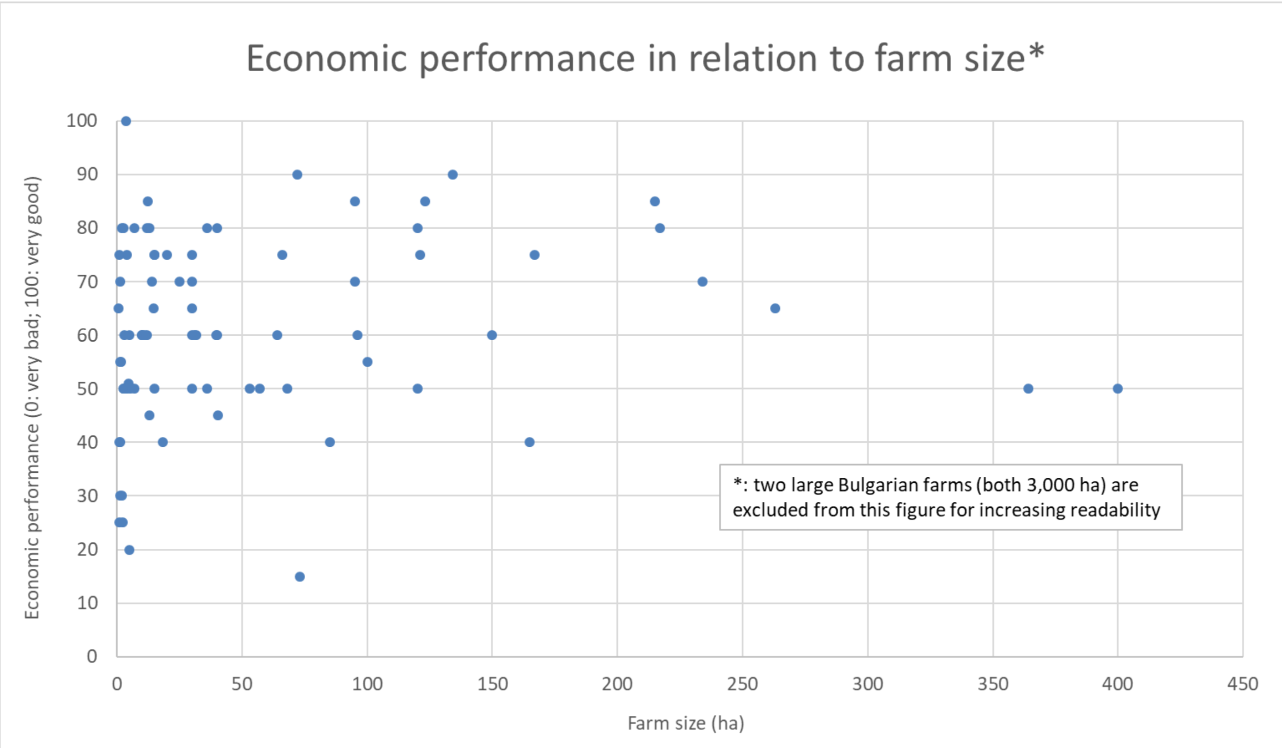


Figure 34: Economic performance in relation to farm size (*: the two large Bulgarian farms (both 3,000 ha) are excluded from this figure for increasing readability; they do not affect the correlation results significantly)*

The total farm income, which is defined as the sum of all receipts from selling farm products and services (crops, livestock, and farm related goods and services) and public payments (subsidies), of the new entrants shows large differences (s. Figure 35). While there are 20 new entrants with a total farm income of less than 25,000 €/year, there are another seven farms reaching more than 1,000,000 €/year total farm income. Twenty new entrants have an annual total farm income of 250,000 € or more. While all other countries include a maximum of three farms with total farm incomes above 250,000 €/year, seven Dutch new entrants reach this threshold.

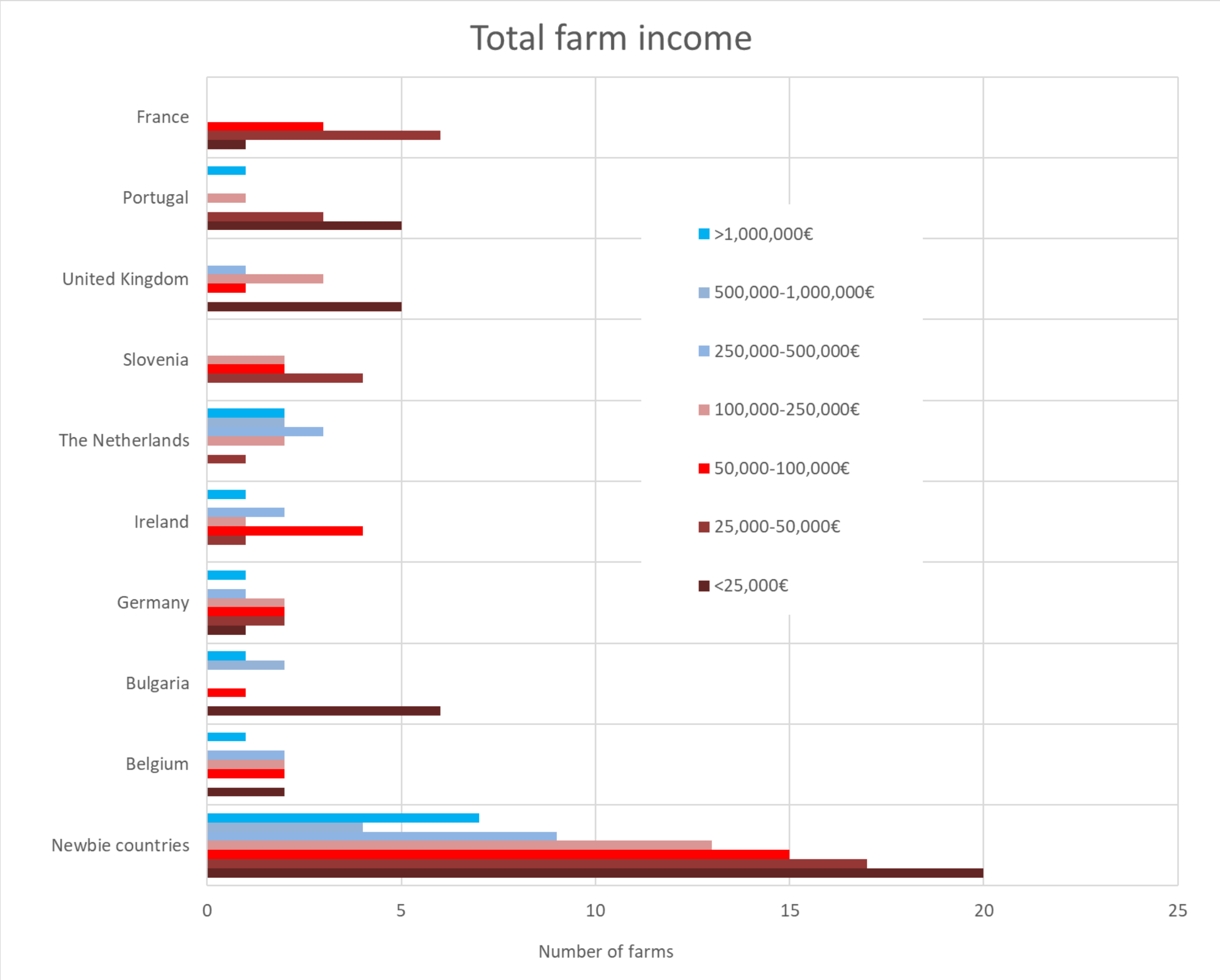


Figure 35: Total farm income

When switching from total to net farm income, about half of the sample has a net farm income of maximum 25,000 €/year followed by 25,000-50,000 €/year (15 newbies) and 50,000-100,000 €/year (10 newbies) (s. Figure 36). The net farm income is the total farm income minus all farm expenses, including costs of goods sold, depreciation costs, and taxes. In total, only five new entrants reach a net farm income of more than 250,000 €/year, whereas one reaches more than a million. This one is a large-scale greenhouse horticulturist from The Netherlands.

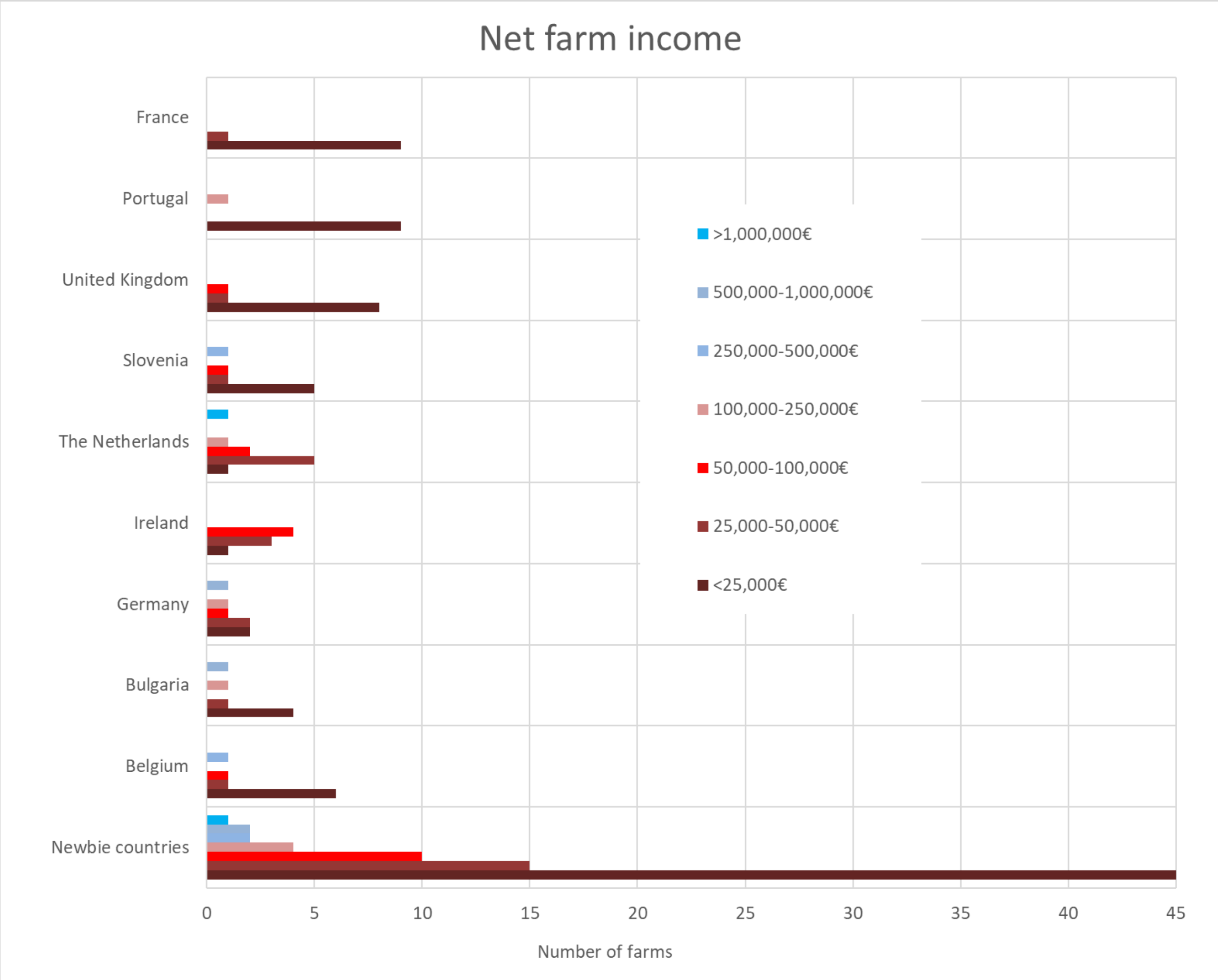


Figure 36: Net farm income

Access to resources

Key resources for new entrants are access to land, capital, markets, knowledge, networks, and labour. The new entrants were asked to assess the access to these key resources on a scale of five characteristics from very easy to very difficult (s. Figure 37). Easy access is the most often nominated access criterion, but depending on the key resources differences become clear and show also that there are access barriers to reach these resources.

Access to land does not show any trends; each criterion (very easy, easy, indifferent, difficult, very difficult) reaches between 16 and 20 nominations, but most new entrants name a very difficult access to land. That means that 35 new entrants name that access to land is difficult or very difficult. On the other hand, about the same amount of new entrants found it easy or very easy access to land. This group of new entrants covers the successors of existing farms, for that reason access to land is not a crucial barrier. Access to capital for these farmers is difficult, only one farmer had a very easy access to capital. The majority of new entrants found access to capital difficult. Access to markets, knowledge, and networks show an overall similar picture. The majority of interviewees had an easy access, but the indifferent, difficult, and very difficult criteria are also quite prominent. For all of the three resources more than 20 newbies indicate difficult access followed by indifferent (between 11 and 18 nominations). Some also highlight a very difficult access to markets, knowledge, and networks. Access to labour is another crucial aspect for new entrants. More than 60 interviewees indicate an indifferent, difficult or very difficult access to labour, while only about 20 mention an easy (18) or very easy (4) access. Especially the Bulgarian case studies name it difficult or even very difficult to access labour.

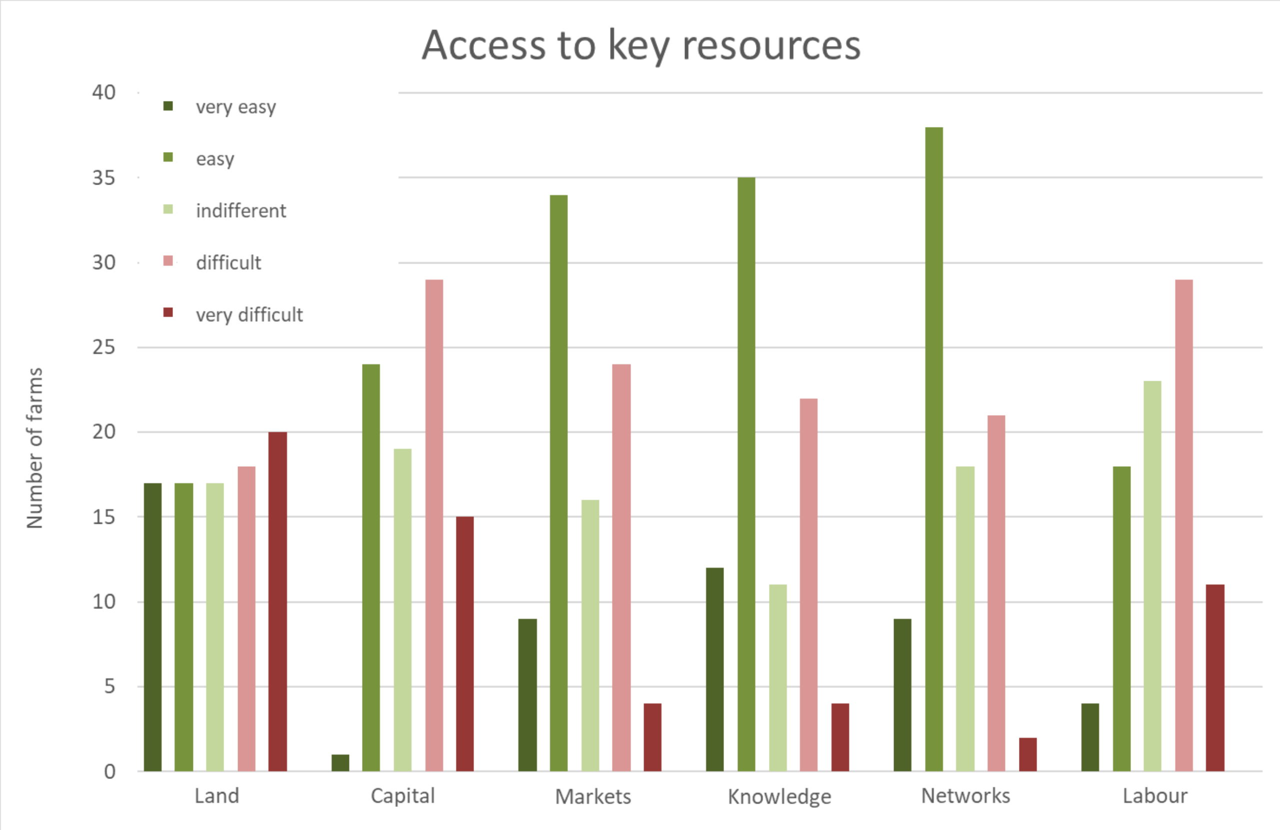


Figure 37: Access to key resources

Socio-economic characteristics of new entrants and their farms

On average the interviewed new entrant farms offer four full-time jobs (s. Figure 38). About half are family employees. The numbers are somewhat increased by the comparable large number of jobs in the Bulgarian case study examples.

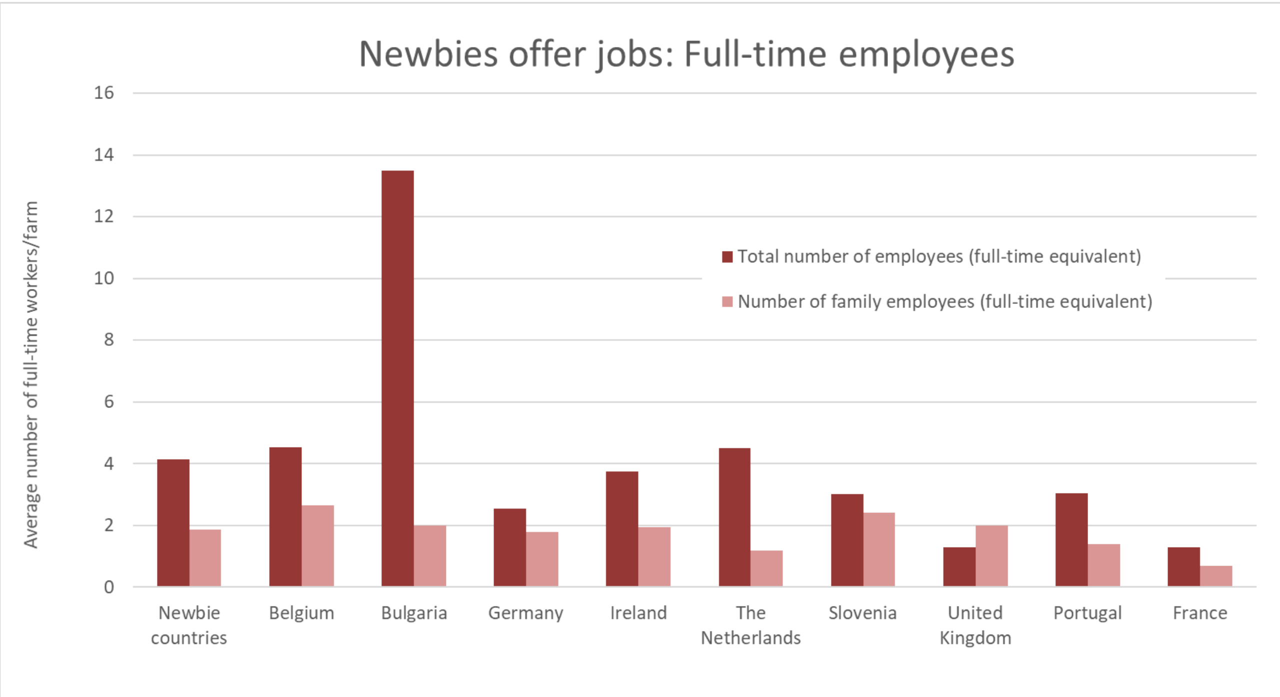


Figure 38: Newbies offer jobs

Apart from contributing to the local, often rural, economy, new entrants do have a recognizable support from volunteers on-farm (s. Figure 39). More than 30 farms receive support from volunteers, especially in The Netherlands, UK, Belgium, Ireland, France, and Germany.

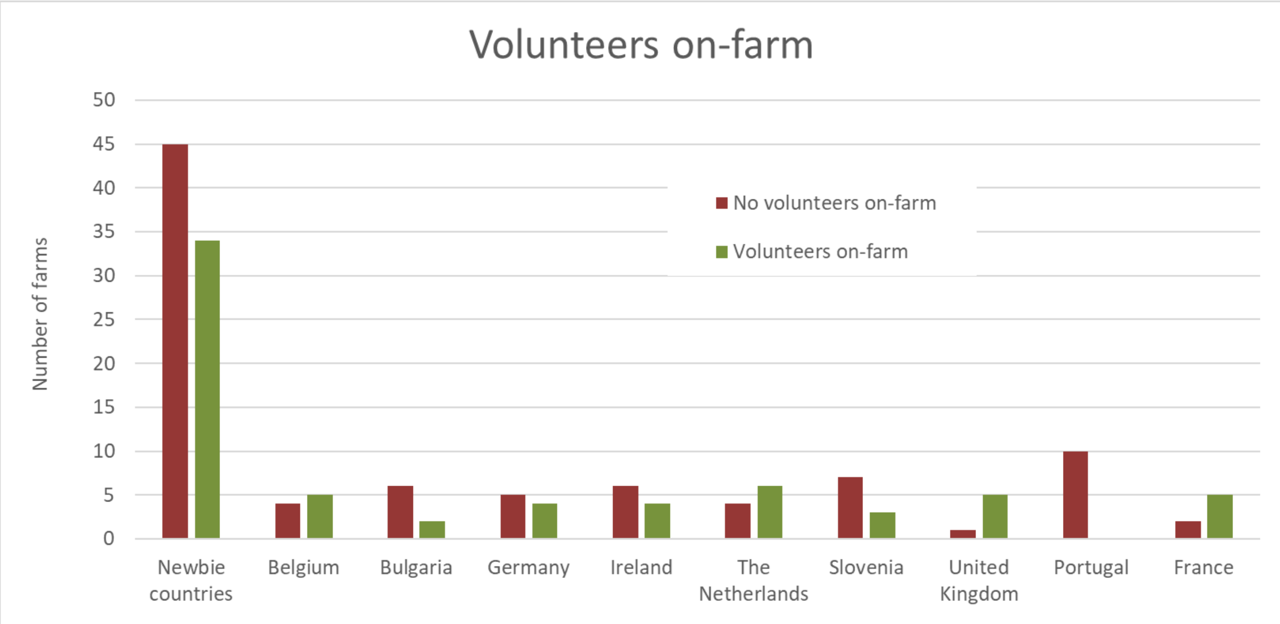


Figure 39: On-farm volunteers

The large majority of interviewed newbies is 44 years or younger (s. Figure 40). Another 14 farms are run by newbies in the age range between 45-54, while only two Dutch, one Belgian, and one French newbie belongs to the age range 55-65. The majority of farm-responsible newbies is male, but considering the male-dominated agricultural sector, the number of female newbies is noteworthy (s. Figure 41).

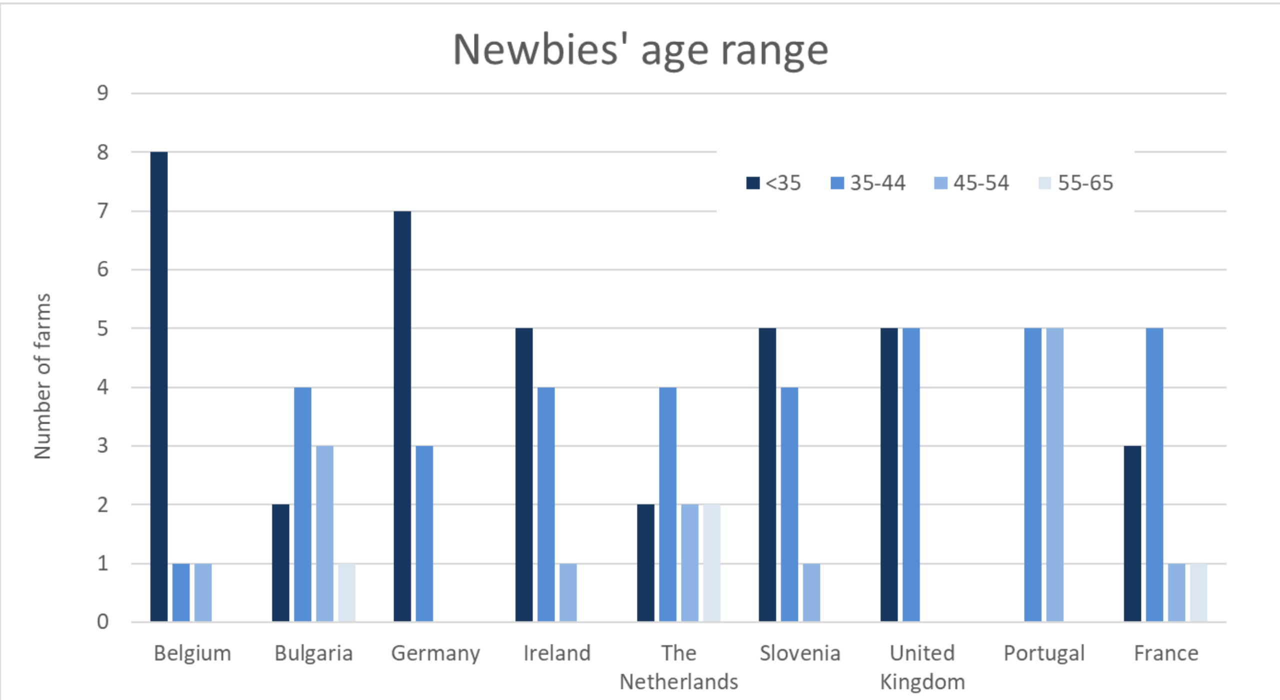


Figure 40: New entrants' age distribution

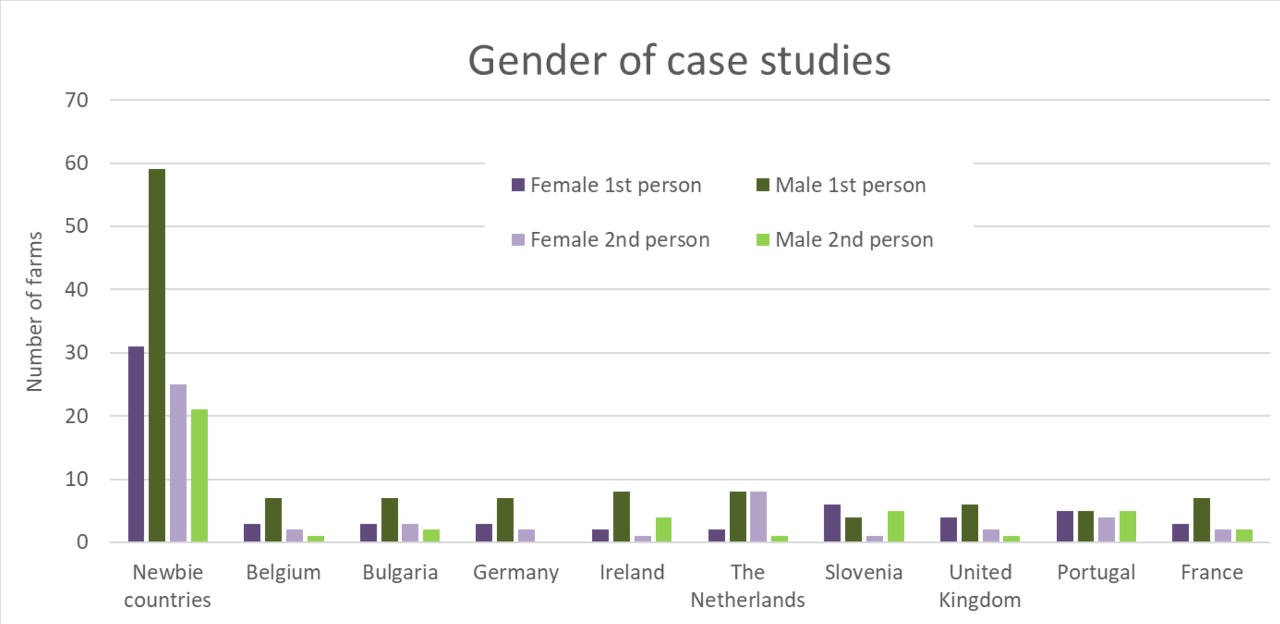


Figure 41: New entrants' gender distribution

The large majority of new entrants can profit from a background in farming – this is especially true for the case studies from Belgium, Bulgaria, Ireland, but also from Slovenia, Portugal, and Germany (s. Figure 42). Contrarily, the majority of interviewed newbies from France and The Netherlands does not have a background in farming. In the UK the relation is balanced.

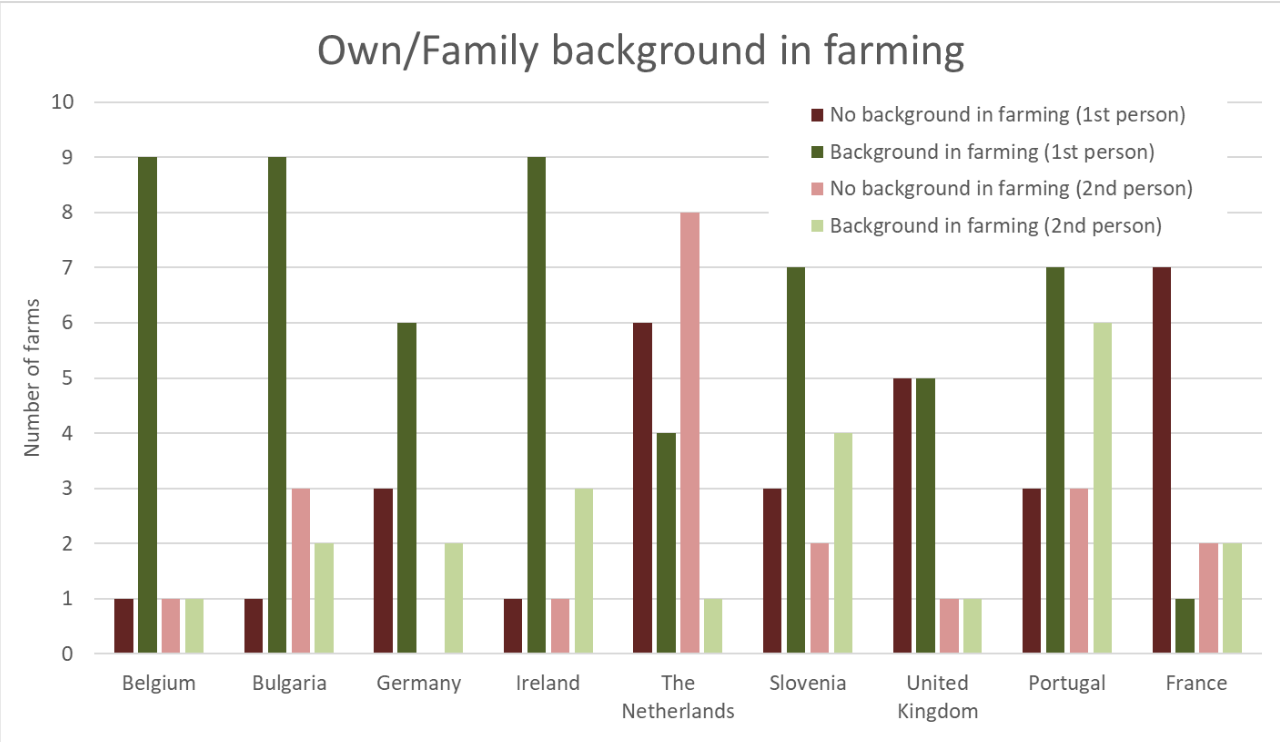


Figure 42: New entrants' and their families' background in farming

The highest education of interviewed new entrants is dominated by persons with a university degree followed by, secondly, technical, thirdly, vocational, and, fourthly, secondary school degrees (s. Figure 43).

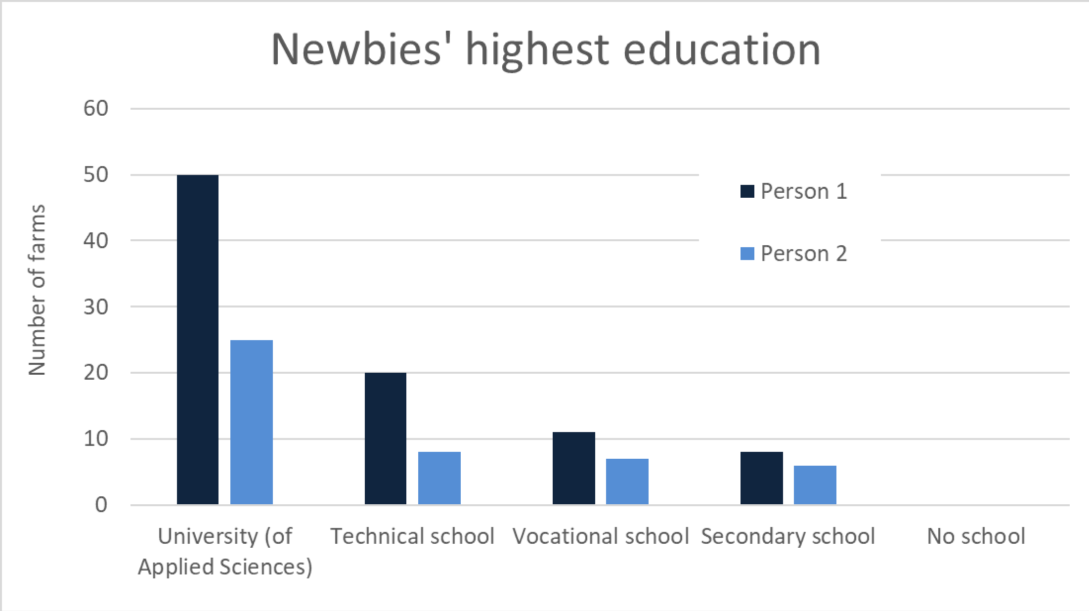


Figure 43: Highest education of new entrants

Policy and training demands

The 90 new entrants were asked to highlight the political and training demands for new entrants in general. With regard to political demands, several newbies name less bureaucracy and regulation as important (Slovenia, Germany, Portugal). In particular, the political framework conditions and valid regulations should not change quickly (Slovenia), better public aid and advice (Portugal). It is also mentioned that policy should not only set rules for large farms, but also take small farms into account (Bulgaria, Germany, Portugal). Dutch new entrants would like to see political support in financing, mentorships, and establishment of networks for newcomers into farming. Furthermore, the Dutch and Belgian new entrants are in favour of a more controlled land market allowing better access conditions for enthusiastic and passionate persons willing to step into farming. Support in financing is mentioned more concretely by Bulgarian newbies, who are looking for lower interest rates to get better chances in the crucial entrepreneurial starting phase. Irish new entrants ask for changes in loan programmes and subsidies for smaller farms. Furthermore, the Slovenian newbies would like to see a stronger promotion of agricultural tourism and national food production, while the Belgian newbies see a lack of broad social support, which could be improved with political incentives.

Training demands for newbies were varied. Several newbies from different countries name the demand for farm transfer courses targeting both sides, the retiring and the successor side (especially Ireland, The Netherlands, Germany). Irish newbies see a demand for more education in business administration. Furthermore, education on entrepreneurial skills is missing (Belgium). Belgian newbies also see a training demand in finances, risk management, and knowledge on alternative business models. For the latter issue, they see the collection of best practice case studies as a first step forward. In Bulgaria and Portugal, more practical training and exchanges are highlighted as appropriate teaching methods. In addition to this, the Portuguese education offers for new entrants need to become better, up-to-date, and targeted. Networking and usage of social media are additional training fields listed by Dutch new entrants. More generally, the German new entrants see a demand for personal/soft skills and addressing the issue of (very) high workload in education – with the aim to improve work-life-balance.

Future farm development

The 90 Newbie case studies have been asked for their short-, mid-, and long-term farm development goals. Short-term planning aims primarily to improve production (conditions), expand (in different meanings), and increase profitability. Some Dutch new entrants did not see an urgent need for significant short term changes on-farm but wanted to optimize what they had developed so far. This is also concluded by some German and Slovenian newbies. Improvement in production conditions are named in Germany, Ireland, Slovenia, and UK. New entrants from different countries want to increase profitability: to reach this, Belgian interviewees want to invest in buildings, machinery, and equipment, Bulgarian newbies want to increase profitability by expanding the farm, building new stables, integrating new crops and new on-farm services, here tourism. The Irish newbies focus on options to expand the business, while one Irish case study is looking for the US customers as a new market segment. Some Slovenian new entrants also want to expand, while others want to keep the main resources stable, but aiming to reach more customers via PR and an online shop. Expansion is also named in the UK and Germany, but one German farm is also willing to step into animal leasing, which allows the farmer to market (lease) the cattle already as calves. One UK farm is willing to train labour to allow more own flexibility and leisure time, while a Portuguese new entrant wants to replace plastic packaging with renewable ones.

Mid-term planning is often associated with efficiency increase, new products, new markets, on-farm processing and marketing, on-farm non-agricultural diversification, and expansion. Furthermore, improvements of equipment and buildings are also mentioned. A UK newbie wants to develop from part-time to full-time farming, while a Slovenian newbie is aiming to find a suitable worker to reduce family workload. The demand for a better work-life-balance is also raised in the Netherlands.

Improved work-life-balance is also an issue of the long-term planning in Belgium. Furthermore, they want to keep the farms “up-to-date”, like the Dutch newbies in terms of technology including smart farming. Furthermore, also the long-term planning includes expansion at some of the interviewed farms. Additionally, it is mentioned, that they want to stabilise their farm business and repay the loans. Furthermore, the long-term planning seems to be when more significant changes take place such as additional business paths, e. g. farm café in Germany, Irish wine production, on-farm tourism services and educational offers (UK). A Portuguese new entrant wants to become the benchmark for agricultural products.

The case study collection in the project and open research fields

The case study collection provides manifold farm-specific information and topics for discussions within the networking (WP3) and toolkit (WP4) tasks of the Newbie project. This includes steering group meetings, discussion circles, international exchanges, Newbie conferences, but also practices abstracts, practice descriptions, and pedagogical resources for advisors and educators. The national and international networks benefit from inspiring and innovative examples of new entrants, which are presented within this written report in a descriptive way and additionally presented online on the Newbie website. As the case study collections is aiming for a catalogue of good practices of new entrants into farming, it is not representative.

Some open issues, which exceed the scope of this deliverable, but for which the Newbie consortium sees additional research demand, are:

- Coming from good practices/case studies to evidence-based research

- Agricultural policy schemes: Are support measures / subsidies sufficient and effective for new entrants in farming? What about entering agriculture without EU funding?
  Within this case study collection EU’s CAP is limited to: Around 80% of the interviewed case studies receive direct payments under the EU Common Agricultural Policy scheme. All Bulgarian and Slovenian newbies indicate the receipt of public money, while only half of the UK farms name this revenue stream. Furthermore, the large majority of farmers that rented farmland and receiving EU CAP direct payments were able to keep the subsidies (80%), while some have to pass the subsidies on to the land owner.

- Non-successful new entrants: It would be interesting to learn from new entrants who failed in farming. While lessons could potentially be learned from those, it would be difficult to engage with those and encourage them to publicly share the story of their business failure. The failure of the business could also lead to a greater negativity towards entering farming or setting up an agricultural business if these were to be added as case studies. Outside this case study collection, information and stories of these non-successful new entrants can be very helpful for defining the key bottlenecks and fields to be thoroughly considered in providing supportive environment (advisory services, education, support measures, etc.).

Annex I: Instructions for the case study collection

Case study collection

Deliverable 2.2 „Inventory of new entrant case studies“
Lead: FHS, HUTTON & TEAGASC
Contributions: All partners
Due national case study collection: early December 2018
Due Deliverable: February 2019

1. Introduction and workload

Within WP2 every partner (except Germany with two partners) has 2.5 person months to be spending in the data collection of Deliverables 2.1-2.4. However, the WP and task leaders FHS, TEAGASC, and HUTTON have according to the obligations (preparation of guidelines, data analysis, report, etc.) higher person months' numbers. The 2.5 person months per partner country for data collection in WP 2 can be translated into 50 working days. WP 2 leaders propose to spend the following working days per deliverable:

- Deliverable 2.1 (State of the art business models): 10 working days
- **Deliverable 2.2 (Inventory case studies): 25 working days**
- Deliverable 2.3 (Analysis strategic business planning): 10 working days
- Deliverable 2.4 (Characteristics and needs of stakeholders): 5 working days

2. Schedule and instructions

2.1 Schedule

Schedule for the case study collection (Del. 2.2):

Date	Partner	Task
08/06/2018	FHS/HUTTON/TEAGASC	Draft standardised questionnaire and instructions
12-14/06/2018	All	Discussion at project meeting (Aberdeen)
29/06/2018	All	Feedback to FHS/HUTTON/TEAGASC
20/07/2018	FHS/HUTTON/TEAGASC	Pretesting
12/09/2018	FHS/HUTTON/ TEAGASC	Final standardised questionnaire and instructions
Sept-Dec	**All**	**Interviews (10/country)**
12/12/2018	All	Data transfer
28/02/2019	FHS/HUTTON/TEAGASC	Data analysis and report
15/03/2019	Coordinator	Review
15/03/2019	Reviewer	Review
29/03/2019	**FHS/HUTTON/ TEAGASC**	**Final report**

2.2 Instructions

The case study collection in each of the nine Newbie partner countries builds an important task, primary data source, and foundation for the subsequent Work Packages and Deliverables. Its aim is the description of good-practices of new entrant business and entry models in Europe building on case studies from nine countries throughout Europe. The foci lie on business and entry models, strengths, weaknesses, hurdles, barriers, gaps, skills and competences of and for new entrants.

The pre-tested **standardized questionnaire** has to be used when interviewing **ten new entrants in your country (personal face-to-face interviews)**. Please select your ten case studies per partner country based on the following criteria.

- **Farmers' / Farm business' characteristics:**
    - The ten national case studies have to include both forms of new entrants (successors and newcomers from outside agriculture)
    - The new entrants have to actively run the farm business for at least two years

- **Geographic spread coverage**:
    - Please pay attention that you interview new entrants from **more than one region representing at minimum two main landscape types** in your country (e. g. mountain ranges, lowlands, fertile soils, sandy soils, river basins, etc.)
    - Please also consider **urban influences** – a minimum of two case studies should origin from urban/peri-urban locations

- **Agricultural structure**:
    - **Farm size:** relative frequencies and average of the inventory should be similar to national representativeness
    - **Full-time / part-time farming:** the ten case studies per country have to cover both full- and part-time farming; however, at minimum seven case studies should be full-time farms per country (independently from national statistics; e. g. in Germany ca. 50% of farms work part-time)
    - **Farm orientations:** characteristic national farm orientations (e. g. dairy farming, beef farming, sheep, pigs, poultry, arable farming, horticulture, viticulture, fruits, etc.) should be covered in the inventory
    - **Marketing:** Some of the ten case studies should apply on-farm processing and short food supply chains (direct sale or short chains to restaurants, local businesses, etc.)
    - **Diversification:** Some of the ten case studies should apply on-farm non-agricultural diversification (agro-tourism, social care, educational services, etc.)

We highly recommend you to **audio-tape** the interviews. The majority of questions are open, so that audio-taping allows you to perform the interview in a more relaxed and concentrated atmosphere. We do not expect transcriptions and translations of all interviews, but would be interested in some interesting/surprising/outstanding quotes.

Furthermore, we would like to ask you to conduct the interviews with **two interviewees per farm**, if possible. This means husband/wife (partners) respectively two active/responsible persons, when the farm is run by a larger group. Based on earlier experiences, we learned that it brings valuable additional input, when interviewing two persons instead of one.

The WP leaders provide an excel template for the data entry.

Annex II: Standardized questionnaire

Standardised questionnaire for "new entrant case study collection"

Thank you very much for taking your time to be interviewed within the course of the H2020 Newbie project. The Newbie team highly appreciates the time you dedicate to the project.

1. **Motivation & Entry into farming**

   a) How did you get the idea to start / enter a farm business? (open text field)

   b) What was your initial motivation to start or takeover your farm? (e. g. a crucial personal experience which encouraged you to start/takeover your farm) (open text field)

   c) Have you taken over an established farm, or started a new farm? Please indicate also the year of commencement.
      1. Takeover of family farm __________ year
      2. Takeover of partner's family farm __________ year
      3. Takeover of other farm __________ year
      4. Started a new farm business __________ year
      5. Collaboration with a farm owner __________ year
      6. Other: ______________________ __________ year

   d) If you took over an established farm, did you continue the farm in the same way as the previous farmer?
      - ☐ Yes
      - ☐ No, what changes did you make? (Open text field)

   e) What structure do you farm under?
      - ☐ Individual/sole
      - ☐ Family Farm
      - ☐ Collaborative Arrangement (e. g. Partnerships, Contract Farming)
      - ☐ Co-operative / Community-supported
      - ☐ Other: _________________

   f) By which channels / means have you searched for a farm / an entry option? (open text field)

   g) How did you find the farm / entry option finally? (open text field)

   h) How long did it take to find the farm? (e. g. months/years)

i) Did you seek and use any available support and information services to help you establish your farm business?

- ☐ Yes
- ☐ No

j) If yes, who helped you in the entry process?

- ☐ Advisory services
  - ☐ State
  - ☐ Private entity, please specify: _______________
- ☐ Business incubator groups
- ☐ Personal contacts / networks; please specify: ______________
- ☐ Land development institutions
  - ☐ Public, please specify: _______________
  - ☐ Semi-public, please specify: _______________
  - ☐ Private, please specify: _______________
- ☐ Farmers' organisation, , please specify: _______________
- ☐ Other: ________________

k) How was the farm financed? And by what percentage?

☐ By yourself	_______%
☐ Family	_______%
☐ Bank	_______%
☐ Crowdfunding	_______%
☐ Share farming	_______%
☐ Other: ______________	_______%
☐ No answer	

l) What is your main motivation to run the farm? (open text field) [Note for the interviewer: the new entrants' main motivations can be for example social or educational purposes, environmental purposes; earning a living; being the own boss; etc.]

2. Structural farm characteristics

m) Are you a full- or part-time farmer?

- ☐ Full-time (Ø ___on-farm working hours per week)
- ☐ Part-time (Ø ___ on-farm working hours/week & Ø ___ off-farm working hours/week)

n) Is your farm conventional or organic?

- ☐ Conventional
- ☐ Organic
- ☐ In conversion to organic
- ☐ Other, please specify: _______________

o) What is your total farm size? Please also specify areas under arable land, grassland, permanent cropland and forestry.

- ☐ Total UAA: __________ ha
- ☐ Arable land: __________ ha
- ☐ Grassland: __________ ha
- ☐ Permanent cropland (orchards, vineyards, …): __________ ha
- ☐ Forestry __________ ha
- ☐ Other (Agro-forestry, …) __________ ha

p) Please indicate the proportion of owned, leased and rented land farmed?

- ☐ Owned land: __________ ha
- ☐ Leased land (long-term, >5 years): __________ ha
- ☐ Rented (short-term, ≤ 5 years): __________ ha

q) What livestock do you keep on the farm? Please also indicate the approx. number.

- ☐ No livestock
- ☐ Dairy Cows: __________ number
- ☐ Beef Suckler Cows __________ number
- ☐ Beef Cattle: __________ number
- ☐ Sows: __________ number
- ☐ Fattening pigs: __________ number
- ☐ Laying hens: __________ number
- ☐ Poultry Fattening: __________ number
- ☐ Sheep (Breeding Ewes): __________ number
- ☐ Goat: __________ number
- ☐ Horses: __________ number
- ☐ Fish/Seafood: __________ number
- ☐ Other (_____________): __________ number

r) Do you process products commercially on your farm? If yes, please specify the products and the proportion of the total production.

- ☐ No
- ☐ Yes
  - ☐ Meat products: _________%
  - ☐ Milk products: _________%
  - ☐ Cereal products: _________%
  - ☐ Vegetable/Fruit products: _________%
  - ☐ Viticulture products: _________%
  - ☐ Other (___________) _________%

s) Do you use short food supply chains? If yes, please specify the types and please indicate the economic shares of all farm sales [For interviewer: e. g. 40% of product sale income might origin from direct sale].

- ☐ No
- ☐ Yes, direct selling, ca. ______ % (of all sales)
  - ☐ On-farm shop
  - ☐ Farmer markets
  - ☐ Sale booths (e. g. in the street, supermarkets)
  - ☐ Automatic vendor
  - ☐ Home delivery
  - ☐ Online home delivery
  - ☐ Self-pick
  - ☐ Food assemblies
  - ☐ Other, please specify: ____________
- ☐ Yes, short chains, ca. ______ % (of all sales)
  - ☐ Local shops
  - ☐ Gastronomy (restaurants, cafés, etc.)
  - ☐ Canteens (schools, companies, etc.)
  - ☐ Supermarkets with regional food sale
  - ☐ Nearby farm shops
  - ☐ Other, please specify: ____________

t) Do you conduct on-farm non-agricultural diversification businesses on your farm?

- ☐ Agri-Tourism
  - ☐ Gastronomy
  - ☐ On-farm Accommodation
  - ☐ Rental services (e.g. for weddings)
  - ☐ Equestrian services
  - ☐ Recreation/Sport
  - ☐ Other (___________)
  - ☐ Other (___________)
- ☐ Social/Pedagogical services
  - ☐ Educational services
  - ☐ Care farming
  - ☐ Child day care/ kindergarten
  - ☐ Other (___________)
- ☐ Renewable energies
  - ☐ Wind
  - ☐ Solar
  - ☐ Renewable raw materials (biogas, …)
  - ☐ Other (___________)
- ☐ Other private/public services
  - ☐ Other (___________)

u) What is your main business? Please describe in your own words! (open text field)

3.) Farm business characteristics

v) Please indicate the three main pillars on your farm (rank 1: highest relevance)? Please indicate who is responsible for each activity.

☐ Food production	rank: ___	run by:
☐ Processing	rank: ___	run by:
☐ Direct sale/Short chains	rank: ___	run by:
☐ Educational services	rank: ___	run by:
☐ Recreational services	rank: ___	run by:
☐ Social services (e. g. care)	rank: ___	run by:
☐ Environmental	rank: ___	run by:
☐ Research & Development	rank: ___	run by:
☐ Other: _______________	rank: ___	run by:
☐ Other: _______________	rank: ___	run by:

w) Do you have a Unique Selling Point that differentiates you from other farms in your area? If yes, please specify:

- ☐ No
- ☐ Yes (open text field)

x) Please tick and rank your most important customer segments! (rank 1: largest importance) [For interviewer: If services, e. g. educational/social, are of high relevance on-farm, please indicate final consumers/users]

☐ Wholesaler	rank: ___
☐ Cooperatives	rank: ___
☐ Retailer	rank: ___
☐ Regional processors (mills, bakeries, butchers, …)	rank: ___
☐ Regional businesses (restaurants, cafés, …)	rank: ___
☐ Final consumers (products)/users (services)	rank: ___
☐ Other, please specify: ____________	rank: ___
☐ Other, please specify: ____________	rank: ___

y) What public relations and advertisement channels do you use? Please also indicate the frequency of the public relations and advertisement actions (per month/per year).

	1	2	3	4	5+
☐ None					
☐ Social media (/month)	☐	☐	☐	☐	☐
☐ Newspaper (/month)	☐	☐	☐	☐	☐
☐ Leaflets, flyers (/month)	☐	☐	☐	☐	☐
☐ Internet website (/month)	☐	☐	☐	☐	☐
☐ Open days (events/year)	☐	☐	☐	☐	☐
☐ Word-of-mouth					
☐ Other ________	☐	☐	☐	☐	☐

z) What are the most important networks, media, and organisations which provide you with information and inspiration for running and developing your business?
[For interviewer; possible answer: study groups, farmer organisations, societies, social media (facebook, linkedin, etc.), associations, online courses (life-long learning offers), etc.]

aa) Do you receive direct payments under the EU’s Common Agricultural Policy?

- ☐ No
- ☐ Yes

bb) If yes, can you keep the direct payments yourself or must pass them on to the landowner in case of leased/rented land?

- ☐ I can keep them
- ☐ I can keep them but land lease is considerably higher than direct payment
- ☐ I have to pass them on to the landowner

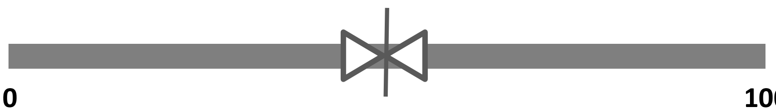
cc) Please tick and rank the up to three biggest fixed costs of your farm? (rank 1: highest costs)

- ☐ Land rank: ___
- ☐ Buildings rank: ___
- ☐ Machinery rank: ___
- ☐ Financing rank: ___
- ☐ Other________________ rank: ___

dd) Please tick and rank the up to three biggest variable costs of your farm? (rank 1: highest costs)

- ☐ Labour rank: ___
- ☐ Production inputs rank: ___
- ☐ Contractors rank: ___
- ☐ Livestock rank: ___
- ☐ Marketing rank: ___
- ☐ Other________________ rank: ___

ee) How do you rate the profitability of your farm business? Please use the bar scale from 0 (very bad economic situation; large financial losses) to 100 (very good economic situation, large financial profits)



0 (very bad, large losses) **100** (very good, large profits)

[For interviewer: The following questions on farm income are very confidential; in case the new entrant is reluctant/not willing to answer; please go on with the next group of questions]

ff) Please indicate your total and net farm income by ticking the correct boxes! (Total farm income indicates product/services x price. Net farm income is the products/services income subtracted by costs)

	Total farm income:	Net farm income:
<25,000 €	☐	☐
25,000 - 50,000 €	☐	☐
50,000 - 100,000 €	☐	☐
100,000 – 250,000 €	☐	☐
250,000 € - 500,000 €	☐	☐
500,000 € - 1,000,000 €	☐	☐
>1,000,000 €	☐	☐

gg) Please name your main business segments and estimate the shares, which they contribute to the total farm income! (e. g. 40% direct sale of farm produce; 20% wholesaler; 20% educational services; 20% on-farm accommodation)

______________________________	_____% of total farm income
______________________________	_____% of total farm income
______________________________	_____% of total farm income
______________________________	_____% of total farm income
______________________________	_____% of total farm income

4.) Business and entry characteristics – strengths and success factors

hh) Based on your personal perspective and experiences what are the key strengths of your farm business? (open text field)

ii) Based on your experiences as a new entrant, starting a farm, what were the key factors that made your farm a success? (the top 3 success factors) (open text field)
[For interviewer: Focus should be late on the takeover process/launch of the start; examples: good networks; good advisory services; easy access to land; family support; background in farming/marketing; crowdfunding; etc.]

<u>Success factor 1:</u>

<u>Success factor 2:</u>

<u>Success factor 3:</u>

jj) Open field for additional comments related to success factors:

5.) Business and entry characteristics – weaknesses, hurdles, and barriers

kk) Based on your personal perspective and experiences, what are the key weaknesses of your farm business? (open text field)

ll) Based on your experiences as a new entrant, what were the key hurdles when taking over / starting the farm business? (open text field)
[For interviewer: Focus should be on the takeover process/launch of the start; examples: gaining income from the business; lack of farming experience; access to agricultural networks; dealing with/complying to rules and regulations; business development; etc.]

<u>Key hurdle 1:</u>

<u>Key hurdle 2:</u>

<u>Key hurdle 3:</u>

mm) Please rate the accessibility of the below listed resources when starting/taking over your farm business:

	very easy	easy	indifferent	difficult	very difficult
• Land	◻	◻	◻	◻	◻
• Capital	◻	◻	◻	◻	◻
• Markets	◻	◻	◻	◻	◻
• Knowledge	◻	◻	◻	◻	◻
• Networks	◻	◻	◻	◻	◻
• Labour	◻	◻	◻	◻	◻
• Other	◻	◻	◻	◻	◻

nn) If you indicate that (some) resources were difficult/very difficult to access (see question above), please specify them and also specify how you have overcome these barriers?

Resource (if applicable)	Details	How have you overcome?
Land		
Capital		
Markets		
Knowledge		
Networks		
Labour		
Other		

6.) Review and future development / planning

oo) If the opportunity arose to start a new farm business, what aspects would you repeat and what would you do differently? [In case of a second take over / farm establishment: Would you conduct the farm succession / foundation as you have done first time? What would you do likewise, what differently?] (open text field)

pp) What are your plans for the future development of your farm business short-, mid-, and long-term? (open text field)

- Short-term:
- Mid-term:
- Long-term:

qq) What resources and training are needed to implement these plans? (Open text field)

rr) How would you change policy, training or other services to help yourself and other new entrants taking over / starting a farm? (open text field)
Policy:
Training:
Other (please specify: ____________):

7.) Business and entry characteristics - socio-economic characteristics

ss) How many employees (including you/your family) are working on the farm?
Total number of employees: ______ Full-time equivalent
Number of family employees: ______ Full-time equivalent

tt) Are volunteers working on the farm / supporting you on the farm?
- ☐ No
- ☐ Yes, please indicate their workload: ____ hours per week voluntary work

8.) Please provide further information on your personal, family, and educational background

uu) What is your age?

	Person 1	Person 2
< 35	☐	☐
35-44	☐	☐
45-54	☐	☐
55-65	☐	☐
> 65	☐	☐
No answer	☐	☐

vv) What is your gender?

	Person 1	Person 2
Female	☐	☐
Male	☐	☐
No answer	☐	☐

ww) Do you have a partner / family?
- ☐ Partner / spouse
- ☐ Children; if yes, how many: ____ and of what age: ___, ____, ____, ____
- ☐ No answer

xx) What is your professional background?
Person 1:
Person 2:

yy) Do you or your family have a background in farming?

	Person 1	Person 2
No	☐	☐
Yes	☐	☐

If yes, please specify:
Person 1:

Person 2:

zz) Do you have any other education / formation / training in agriculture/horticulture or related subjects of relevance? (for instance also short term training courses, internships, etc.)

	Person 1	Person 2
No	□	□
Yes	□	□

If yes, please specify:
Person 1:
Person 2:

aaa) How would you describe your current occupation? (open text field)

Person 1:

Person 2:

bbb) What is your highest education level?

	Person 1	Person 2
University or University of Applied Sciences	□	□
Technical school / College	□	□
Vocational school/training (apprenticeship completed)	□	□
Secondary school	□	□
No school	□	□

ccc) Please name any additional skills/competences you/your family have/has, which might be of relevance for new entrants into farming! (open text field)

9.) Personal data and contacts

- Name of farm:
- Name of responsible person(s):
- Post address of the farm:
- Email:
- Phone: