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SOCIAL AGRICULTURE MARKET OUTLOOK

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PREFACE

The Green4C Knowledge Alliance, co-funded by the Erasmus+ Programme of the European Union, is a three-year long project (2020-2022) that aims to create new university-business partnerships to develop, support and enhance knowledge and practice exchange and flow, while fostering innovation and facilitating entrepreneurial opportunities, capacity and skills for students, researchers, professionals, as well as practitioners in the field of Green Care. At the foundation of the Alliance is the Green4C consortium made up of universities, research institutes, businesses and international organisations in the four thematic sectors proposed by Green4C: Forest-based care, Social agriculture, Urban green care and Green care tourism. The focus of the project is to foster innovation and entrepreneurship by integrating health and social care with connection to nature and natural resources and ecosystems in both rural and urban areas.

In Green4C, Green Care is the umbrella term referring to the "wide range of activities and targeted beneficiaries, ranging from health and wellbeing promotion (targeted to the wider population) to disease prevention (accessible to a wider population, but typically targeted towards more vulnerable or at risk individuals or groups) and therapeutic interventions which include targeted therapeutic or treatment/ rehabilitation interventions for addressing specific needs" through contact with natural ecosystems and its elements (Mammadova et al., 2021). This conceptualisation is based on a broad understanding of Green Care: it includes the definition of care (i.e. the process of caring for somebody/something and providing what they need for their health or protection), it interprets health holistically and it includes wellbeing as part of the health concept.

SUMMARY

Social agriculture is defined as "an innovative, inclusive, participatory and generative model of agricultural practices that delivers recreational, educational and assistance services" (Di Iacovo and O' Connor, 2009). It addresses the social and labour market inclusion of disadvantaged people, enabling them to contribute to food and agricultural production through engagement in social agricultural practices. Insights from the literature and discussions with national Social agriculture experts suggest that **Social agriculture can be beneficial for participants** (i.e. those who depend on the farm's care services), **providers, our wider society and the environment**. For participants, being in a green environment, an informal atmosphere and engaging in meaningful activities are key benefits that may not be obtained through standard health care and social services (Hartig et al., 2014, Elings, 2012; Farstad et al., 2021). We can say that Social agriculture is in line with changing trends towards a more holistic approach to mental wellbeing and the emergence of a social model of disability (Social Farming Ireland, 2019). For farmers, Social agriculture provides a diversification opportunity, increased social contacts, reduced social and occupational isolation and an enhanced view of farming (Bassi et al., 2016; Kinsella et al., 2016). For wider society, Social agriculture can counteract rural abandonment, create job opportunities, enhance community networks and foster reconnection with agriculture in rural as well as urban settings (Bassi et al., 2016; Borgi et al., 2019). It can also be economically beneficial for society at large when participants (e.g. people with special needs) undertake farm-based activities rather than being placed in care centres (Mammadova et al., 2021). The integration of care with agriculture also fits well with more sustainable modes of production such as organic and biodynamic agriculture (Di Iacovo, 2020; Foti et al., 2013). The integration of care and sustainability in agriculture provides a powerful marketing position for innovative agricultural business models.

The **Social agriculture landscape varies widely across Europe**. In this Market Outlook, we assess the Social agriculture market situation in the Netherlands, Flanders (Belgium), Italy, Austria and Ireland. At present, Social agriculture is integral to the established health care regime in the Netherlands. The creation of a Social agriculture support centre as early as 1999 has probably contributed to the fact that the sector is so well-developed in the Netherlands. In Flanders (Belgium), the Social agriculture sector is also well-established but at a different scale, with the typical Flemish social farm being a family farm receiving an average of two participants two days per week. In Italy, co-operatives as well as private family farms play an important role in catering to diverse needs through diverse Social agriculture practices. In Austria, while social farming initiatives address the needs of a diverse range of participants, there is strong engagement with the education sector via school visits to social farms. In Ireland, while historically Social agriculture was mainly undertaken in large-scale institutional settings where it was integrated into existing disability or addiction services (Di Iacovo and O' Connor, 2009), in more recent years, the establishment of initiatives on family farms has increased steadily.

Sources of reliable quantitative data on the supply of, and demand for, Social agriculture in the countries studied are hard to come by and are often fragmented, incomplete or outdated. However, reliable published sources, as well as expert opinion, suggest that the **Social agriculture market is biggest in the Netherlands** with an estimated 1250 social farms and 35,000 participants at national level. In 2018, this translated into a revenue of €250 million for the Social agriculture sector in the Netherlands. Although Social agriculture data for **Italy** is very fragmented, we expect that it is **the second biggest market** with an estimated 3000 social farms and 15,000 participants. We

contend that **Flanders** (Belgium) has the **third biggest Social agriculture market** with an estimated 1000 Flemish social farms and 2050 participants. The data available in Ireland and Austria make comparisons with these other case studies difficult, but we suggest that their markets are smaller.

To explain how Social agriculture is organised in different European countries, three main frameworks are used. These are: ***multifunctional agriculture*** framework, within which Social agriculture activities are one of many diverse on-farm activities that support the economic and social sustainability of the farm; ***a public health*** framework, within which activities are primarily concerned with providing health promotion, rehabilitation and therapy; and ***a social inclusion*** framework which focuses on the re-integration of socially excluded people through the contribution of on-farm labour (Dessein and Bock, 2010; Dessein et al., 2013). Based on a literature review (Dessein and Bock, 2010; Dessein et al., 2013; Di Iacovo and O'Connor, 2009) and contact with national Social agriculture experts, we placed **Flanders (Belgium) and Austria in the multifunctional agriculture framework** because the Social agriculture sector is characterised by private, commercial farms that want to diversify their income generation and are driven by social motives. As noted above, **historically, Irish Social agriculture** existed predominantly within institutional farm settings and could therefore be represented within a **social inclusion framework**. However, **more recent times** have seen the emergence of family farms providing Social agriculture activities which fits more within the **multifunctional agriculture framework**. The **Netherlands** has been traditionally placed within the **multifunctional agriculture framework** but has also some **characteristics of the public health framework**, e.g. in many cases the income for social farmers comes solely from health care budgets.

Courtesy Orti E.T.I.C.I.

In **Italy**, social inclusion is one of the main reasons for the existence of social farms and therefore fits within the **social inclusion framework**.

As outlined above, while many actors and institutions benefit from the existence of Social agriculture, the main beneficiaries are the "participants", i.e. those who depend on the farm's care services. Participants are generally i) people with special needs or ii) vulnerable or "at-risk" groups (Mammadova et al., 2021). Participants with special needs include people with physical or intellectual disabilities, mental health issues, people with autism and people with dementia. Vulnerable or "at-risk" individuals include homeless people, former inmates, people with an addiction history, youth at risk of alcohol and drug dependency, youth with behavioral problems, women at risk of domestic violence, refugees and asylum seekers, people with learning difficulties, people with burn-out, school drop-outs as well as people who are unemployed for long periods. Recently, national Social agriculture experts have seen an **increasing diversity in the profile of the participants that seek care and social integration through Social agriculture**, including school children and the elderly.

The funding situation is diverse in the case study countries. In the Netherlands and Flanders, the social farmer is paid by the government. Many Irish social farmers are paid by the commissioning organisation. In Austria, the participants pay the farmer, usually through their personal budgets. In Italy, there are different approaches. In social and labour inclusion activities, participants are paid a small monthly fee by the government, allocated through the health services.

The quality of the Social agriculture service is assured through different mechanisms in the five case study countries. In the Netherlands, Austria and Ireland, the quality is controlled or monitored by the national Social agriculture support organisation. Social farms in the Netherlands and Austria receive a quality mark when they fulfill the quality requirements. In Flanders, commissioning organisations are closely involved in monitoring quality issues on the social farms with which they collaborate. In Italy there is no quality scheme at national level but some regions have developed specific regional legislation to assure the quality of social farms.

It is clear that Social agriculture is very diverse throughout Europe. **In each of the countries studied, specific regulations, funding mechanisms, cultural values, support organisations etc. provide a different context for the evolution of Social agriculture.** This diversity can be used by national Social agriculture sectors to learn from each other in order to address the needs of an increasingly diverse range of participants. This **opportunity for shared learning** was also our rationale for convening a **focus group** of national Social agriculture experts on the future of Social agriculture. As an outcome of this focus group exercise, **three key messages** emerged in relation to fostering a sustainable future for Social agriculture.

These are:
1) the **broadening of target groups and activities** in an already multi-sectoral discipline;
2) the need for communication to **raise awareness and increase visibility**; and
3) the need for **tailored and secure funding** to create a sustainable Social agriculture sector.

While Social agriculture has to comply with stringent norms and regulations and at the same time faces difficulties in obtaining financing, there needs to be the **opportunity to illustrate how its advantages and disadvantages compare to those of conventional health care provision**, and how benefits span from the individual, to the community at large and to the environment.

INTRODUCTION

Social agriculture (or social farming) can be understood as **activities that rely on an agricultural context and use agricultural resources for the provision of care activities and social services** (Di Iacovo and O'Connor, 2009). Social agriculture can range from institutional or organisational settings (e.g. hospital, clinic or school) that include specific farming or gardening activities addressed to people with special needs, to family farms that enlarge the scope of their activities to include social services (PROFARM, 2017). Within social agricultural activities, the inclusion of disadvantaged people, or those with physical, intellectual, mental health or social challenges, is integrated with agricultural production (Mammadova et al., 2021). Social agriculture is also a well-recognised way to diversify agricultural activities and put into practice the concept of **agricultural multifunctionality** (Di Iacovo and O'Connor, 2009). Social agriculture is effective in creating new value for products, providing farm diversification opportunities, creating job opportunities, enhancing community networks and the attractiveness of rural areas for tourists and other users (Bassi et al., 2016; Borgi et al., 2019). Therefore, the synergy between care and agriculture is **beneficial not only to the participants of Social agriculture** (those who depend on the farm's care services) **but to an extended community of people**.

Furthermore, Social agriculture offers a new positive perception of **sustainable agriculture**, especially among young people, and fosters an increased interest in people's wellbeing and health (Bassi et al., 2016). This is key to creating opportunities for rural youth, as well as attracting new and young farmers, which are crucial for the sustainable development of the agricultural sector and help to counteract the abandonment of rural areas (Lafranchi et al., 2015; Sponte, 2014). In addition, farmers report benefits from increased social contacts, reduced social and occupational isolation and an enhanced public image for farming, as a result of engaging in social farming activities (Kinsella et al., 2016).

Scientific literature tells us that contact with nature coupled with meaningful social interactions and activities are effective ways to improve people's mental, physical and social wellbeing (Hartig et al., 2014; Kuo, 2015; Social Farming Ireland, 2019; Tidball, 2012; Tost et al., 2019). In addition to the benefits on health and wellbeing from seeing or spending time in a green environment, such as reduced stress, faster healing times after illness and psychological benefits, as well as reduction in crime, Tidball (2012) discusses the added value of **"doing green"**. He highlists the additional benefits of doing hands-on activities in nature, like gardening and caring for animals, on human health and wellbeing (Tidball, 2012). The focus on the participants' abilities rather than their limitations and informal interactions with the farmer and the farm resources (animals and/or plants) are important added values of Social agriculture to standard health care and social services (Di Iacovo and O'Connor, 2009; Elings, 2012).

Social agriculture in Europe differs according to the **national context** in terms of organisational frameworks, the profile of innovators and participants, funding sources, income generation, quality assurance and enabling factors. Social agriculture is recognised in EU policies but the overall picture is still **fragmented** both at international level and within countries. Therefore a clear picture of this sector and its market is still difficult to establish.

The purpose of this Market Outlook is to give an updated overview of the Social agriculture sector in Europe, highlighting the entrepreneurial aspects with an eye on the implications for future developments. This is done by, initially, outlining how Social agriculture can be "framed", then providing concise country profiles and subsequently providing a description of the market. The description of the market starts

with a market overview section where key indicators for the demand and supply side of Social agriculture are analysed for five different case studies (four countries and one region). Subsequently, providers, beneficiaries, funders and quality assurance systems in Social agriculture are discussed in the description of the market. We end with a discussion on the future of Social agriculture and the associated market opportunities for entrepreneurs (land owners, providers of Social agriculture activities and intermediaries).

Courtesy Social Farming Ireland

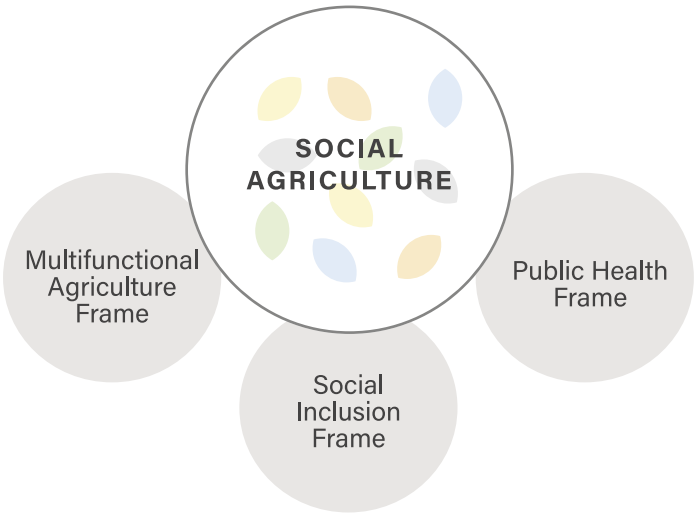
SOCIAL AGRICULTURE: WHAT IS IT?

As outlined above, the targeted inclusion of disadvantaged people, or those with physical, intellectual, mental health or social challenges, into agriculture production has become known as Social agriculture (Borgi et al., 2020; Di Iacovo, 2020). Many different concepts have been used to describe care activities that are offered on farms: Social agriculture (Foti et al., 2013); social farming (Di Iacovo and O'Connor, 2009); care farming (Hine et al., 2008); green care (Sempik and Bragg, 2016) and farming for health (Farstad et al., 2021; Hassink and Van Dijk, 2006). In this document, we use the terms Social agriculture and social farming interchangeably, as distinct from Green Care which can be considered as an umbrella concept. **Social agriculture can be defined as "an innovative, inclusive, participatory and generative model of agricultural practices that delivers recreational, educational and assistance services. It aims at the social and labour inclusion of disadvantaged people, who through social agricultural practices are able to contribute to food and agricultural production"** (Di Iacovo and O' Connor, 2009). According to Di Iacovo and O' Connor (2009), it also addresses "the integration of people with 'low contractual capacity' (i.e intellectual and physical disabilities, convicts, those with drug addiction, minors, migrants) but also provides support services in rural areas for specific target groups such as children and the elderly."

Social agriculture strongly builds upon the concept of a more inclusive agriculture and in some countries is connected to more **sustainable modes of production** such as organic and biodynamic agriculture (Di Iacovo, 2020; Foti et al., 2013). These services are regarded as appealing because of the unique opportunity of connecting to nature, an informal atmosphere, participating in diverse and meaningful activities and learning both new working and social skills (Elings, 2012; Farstad et al., 2021; Hassink et al., 2011). In other words, it is about **being part of a community**. As Elings (2012) aptly observes, "We can say that care and agriculture did not meet each other by coincidence."

An important aspect of the diversity that exists in Social agriculture in Europe relates to how it is "framed" (i.e., communicated, organised and practiced) in different countries. The literature suggests that three main frameworks, also referred to as discourses, are evident when comparing different practices across Europe (Figure 1). These are: ***a multifunctional agriculture (MFA) framework***, within which Social agriculture activities are one of many diverse on-farm activities that support the economic and social sustainability of the farm; ***a public health framework***, within which activities are primarily concerned with providing health promotion, rehabilitation and therapy; and ***a social inclusion framework*** which focuses on the re-integration of socially excluded people through the contribution of on-farm labour. Arguably, these different "framings" influence how Social agriculture is organised and practiced in different European countries. Social agriculture in **Germany, Austria and the UK** tends **towards a public health framing**, while a **social inclusion framework** more accurately captures the operation of activities in **Italy**, and the **multifunctional agriculture framing** predominates in countries such as the **Netherlands, Belgium, Ireland and Norway** (Dessein et al., 2013).

Figure 1. Three Social agriculture frameworks



There is proof from very early records that a recognisable form of Social agriculture was present as early as the 13th century in Geel (Belgium). In Geel, people with special needs were provided with care and simultaneously worked on the land alongside the villagers (Roosens and Van de Walle, 2007). During the 1950s, European farms became increasingly industrialised through specialisation on particular products and processes which meant that many farms lost their connection with nature and society. Many of the first Social agriculture initiatives from the 1960s originated from those farmers who did not want to conform to this development (Di Iacovo and O'Connor, 2009). Intensification of farming was for many a way to remain economically profitable, while for those farmers who did not want to conform, Social agriculture became another way to increase their income while maintaining one's identity and autonomy (Meerburg et al., 2009). However, the concept and **history of Social agriculture is highly connected to the specific national context**. For example, in Italy, social co-operatives became engaged in agricultural activities after psychiatric institutions were closed down in 1980 following the Basaglia Law. In the Netherlands, many of the first Social agriculture initiatives were founded because of a religious or ethical motivation on the part of the individual or organisation (Di Iacovo and O'Connor, 2009). In the UK and Ireland, the Camphill movement had an important influence in the development of Social agriculture (Di Iacovo and O'Connor, ibid.).

Despite the differences in organisational, legal, regulatory and institutional frameworks across Europe, Social agriculture across different countries has been a **way to promote innovation and entrepreneurial attitudes** among farmers who seek to have **positive social impacts as part of their business enterprise** while generating an extension to their existing activities (Hassink, 2017; Mammadova et al., 2021).

SCOPE AND METHODOLOGY

This Market Outlook is not intended to provide a definitive account of the monetary (economic) value of Social agriculture, either at EU or national level. Instead, the aim is to provide a **qualitative description of providers and beneficiaries** and to describe **key issues relating to funding, policy, and certification/ quality standards**. These discussions will be supplemented by **quantitative data for key indicators**, such as demand and supply trends, as available and appropriate. It is worth noting that, despite two decades of research (Hassink and Ketelaars, 2003; Van der Ploeg and Roep, 2003; Van Schaick, 1997), quantitative data with regards to many key aspects of Social agriculture are not available at EU-level and are fragmented, outdated and inconsistent at various regional and national levels.

Consequently, our focus is on those Green4C partner countries with an established tradition of Social agriculture where there is access to expertise and data. These comprise four of the five Green4C partner countries (Austria, Italy, Netherlands and Ireland), supplemented by the Flemish Region (Belgium) where the Social agriculture sector is well-advanced and developed and consequently amenable to description and sharing of knowledge. These five countries/regions can be viewed as case studies, where quantitative and qualitative data were collected and analysed to develop a picture of the Social agriculture market.

The number of participants and the number of social farms capture, respectively, the demand for, and supply of, Social agriculture services. Estimates for these indicators are based on the following sources: (i) the number of participants/number of social farms identified by the main national/regional association based on data provided in recent years (around 2020); and (ii) an estimate of the total number of participants/social farms at national/regional level in recent years (around 2020) including those not represented by the main national/regional association.

A range of primary and secondary sources was used to gather these data, ranging from national or regional published statistics, **interviews with national experts** and a focus group convened for the purpose of compiling this Market Outlook (May 25, 2021). The **focus group** was organised with a group of **national Social agriculture experts** to find **commonalities and differences among the countries under study and assess the future outlook**.

During the focus group, three questions were discussed:

1. Can you describe the main positive and negative recent developments in Social agriculture in your country?

2. In your experiences, how can Social agriculture better address the needs of diverse participants in the future?

3. In your experiences, how can Social agriculture better address the needs of farmers in the future?

The findings of the focus group exercise were used to inform the last section of this Market Outlook which addresses the future of Social agriculture.

CASE STUDY PROFILES

In this section, we provide a brief profile of each of the case study countries, describing the general characteristics of social farming at national/ regional level and profiling the key organisations that support them. Most of the information in this section is based on interviews with the national Social agriculture experts named above, as well as the authors' expertise in the area.

Netherlands

The Social agriculture sector is well-established in the Netherlands. The sector has developed rapidly **from 75 social farms in 1998 to 1250 in 2021** (Elings, 2020). Hassink et al. (2020) note that in 2018, 67% of social farms provided services to people with intellectual disabilities, 60% provided services to people with mental health issues, 43% of the social farms welcomed youth and another 43% catered to the elderly. This **diversity** has **increased since 2005** when the principal focus was on people with intellectual disabilities. In 2018, the Social agriculture sector in the Netherlands had **revenues of €250 million**, equating to an average revenue for care services of **€200.000 per social farm** (Hassink et al., ibid).

Looking at the development of the social farming sector in the Netherlands, these authors identified a number of key milestones. First of all, there was the establishment of the **National Support Centre** in 1999. The task of this Support Centre was to support existing and incoming social farmers. In 2009, on the initiative of 16 regional social farming organisations, the **Federation of Care Farmers** was established. This Federation took over the services provided by the National Support Centre. The federation does not receive subsidies so social farms that want to become a member pay a fee to maintain the Federation's service provision.

There were also some key milestones in the health care sector that positively influenced the social farming sector in the Netherlands. For instance, with the introduction of the **personal budget** in 2003, clients could pay for their own (day) care and this led to an increased number of social farms. In addition, in 2005 the **liberalisation of long-term health care** came into force, allowing social farmers or regional organisations of social farmers to receive their own AWBZ (General Law on Special Health Care Costs) recognition. This allowed social farmers to get a direct agreement with the government for providing care (Elings, 2012; Hassink, 2017). Historically, social farmers presented themselves as a counter-movement but their **legitimacy in the health care sector** has increased owing to the specially developed quality systems for social farms and the co-operation with regular care organisations (Hassink, 2017). Currently, social farms are **integral to the established health care regime** in the Netherlands.

Courtesy Federatie Landbouw & Zorg

Courtesy Steunpunt Groene Zorg vzw

Flanders (Belgium)

In Flanders, Social agriculture is characterised by farmers who do not have a background in providing care and there is **usually no health or social care professional** present on the farm (except when the commissioning organisation provides one). The care services are typically of a **very small scale** with an average of about 2 participants attending twice per week (W. Rombaut, personal communication, 6 May 2021). Consequently, there is often a one-to-one relationship between the participant and the farmer. **Subsidies** are provided to the farmer by the Flemish Department of Agriculture and Fisheries up to a maximum **payment of €40 per day, irrespective of the number of participants**. The Flemish system works well for participants with behavioural disorders that benefit from the small scale of the care services. There appears to be increased interest from entrepreneurs who wish to provide care services as their major source of income by asking for a contribution from their participants. These entrepreneurs are free to undertake this venue but are not financially supported by the government.

A common characteristic of Flemish social farms is that most of them (>95%) are connected to **"Steunpunt Groene Zorg"**, a network organisation for social farms. This organisation receives about 50% of its funding from the five Flemish provinces (agriculture/rural development funds), 25% from the Flemish Department of Welfare, Public Health and Family and 25% from the farmers' organisation "Boerenbond" (W. Rombaut, personal communication, 7 June 2021). Steunpunt Groene Zorg is not a membership-based organisation and does not require those farms connected to it to follow any particular set of rules. Their aim is to be a **knowledge center in this sector and act as a broker for Flemish social farms**. One of the services they provide is matching participants with social farms.

Italy

As outlined above, in Italy, Social agriculture first emerged **at the end of the 1970s**, when the closure of psychiatric asylums due to the **Basaglia Law** of 1979 required a broader societal response. Co-operatives emerged in those years to address the need for residential care using agricultural production as a form of therapy with Law 381/1991 formally recognising the role of **social co-operatives** for pursuing social integration (Fonte and Cucco, 2017). Over the past twenty years, **private farms** have also become more involved in Social agriculture by collaborating directly with the social services for projects of social inclusion on a needs basis, or by becoming formally registered as social farms where the regions enabled specific legislation. **Didactic farms** have also been developed through separate regional legislation.
Since 2015, national legislation (141/2015) defines Social agriculture as the practice that incorporates disadvantaged people and other specific groups, including children and the elderly, into agricultural activities as an aspect of the multifunctionality of agricultural enterprises. This facilitates access to essential services for people, families and local communities throughout the country and, in particular, in rural and/or disadvantaged areas. The legislation identifies private farms as well as co-operatives with at least **30% of their revenue from agricultural production**, as the legal entities for becoming recognised social farms. While the enterprise is recognised as central by the legislation, overall, the evolution of the sector in Italy points to "hybrid governance models in which public bodies, local communities, and economic actors work together to co-produce social services" (Borgi et al., 2019).

Courtesy Orti Etici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Austria

Austria is among the countries with the most diverse Social agriculture landscape. There is a **high diversity in social farm types and the profile of participants**. Participants with the following profiles can find an Austrian social farm that suits their needs: people with a physical or intellectual disability, the elderly, people with mental health conditions and youth with or without social problems (D. van Meel, personal communication, 9 June 2021). This diversity in social farming activities can be illustrated by the fact that the association **Green Care Austria** currently supports certification for twelve different Social agriculture offers, ranging from a farm which receives people with dementia, to farms providing animal-assisted intervention, to farms providing supported employment. Despite the existence of this diversity, there are often long waiting lists for several of these services. In Austria, there is also a high number of social farms focused on providing educational farm tours/visits for schools (Wiesinger et al., 2013). Those farms are connected to the **Schule am Bauernhof** ("School on the farm") network.

The most important associations supporting Social agriculture in Austria are Green Care Austria and Schule am Bauernhof. These organisations support and provide certification for social farms focused on care/integration and education respectively. **LFI** (Ländlichen Fortbildungsinstitutes) and the **University College for Agrarian and Environmental Pedagogy** are important organisations for Social agriculture education and training (D. van Meel, personal communication, 9 June 2021).

Ireland

Historically, social farming in Ireland was characterised by "institutional farms" where farming activities were integrated into large-scale institutional settings within the disability or addiction services (Di Iacovo and O' Connor, 2009). However, the emergence of social farming activities within the **family farm context in recent years** has been driven by a set of interlinked processes and developments. These include the emphasis within mental health policy and practice on recovery in the community and on a holistic approach to mental wellbeing; the emergence of a social model of disability and the increased use of a person-centred and progressive approach within most social inclusion work (Moroney et al., 2018).
Social Farming Ireland (SoFI), the National Social Farming Office, is funded by the Department of Agriculture Food and the Marine (DAFM) (the national ministry) and is charged with the development and progression of Social Farming at national level. It also has responsibility for the development of a national Social Farming network alongside regional partner organisations which are based throughout the country. SoFI provides a wide range of services and initiatives which support the development of social farming nationally, including: dissemination of information on social farming; farmer recruitment, training and development; working with health, social care and other services to activate placements and evidence-based research activity and policy development (Moroney et al., ibid).

Courtesy GREEN CARE AUSTRIA
Wo Menschen aufblühen

DESCRIPTION OF THE MARKET

Market Overview

In this section we describe the demand for, and supply of, Social agriculture by presenting quantitative data retrieved from literature, national reports and experts' estimation. Subsequently, these data will be further discussed with reference to the main characteristics of the providers (supply side), participants (demand side), the funders and quality assurance and certification schemes.

Demand

Here we present two different estimates for the number of social farming participants for the Netherlands, Flanders (Belgium), Italy and Ireland. Table 1 contains data for all case studies except Austria as the data is inconsistent with that available for the other case studies. As noted previously, given the constraints on the availability of reliable data on social farming at national and regional levels, these figures should be considered as an approximation and by no means exact.

Table 1: Demand indicators for Social agriculture

Country/ Region	Number of participants in social farms represented by main national/regional association(s) (around 2020)	Estimated number of participants in social farms at national/regional level (around 2020)[1]
Netherlands	25,000 (M. Fischer, pers. comm., 6 November 2020)	35,000 (Estimation by the authors)
Flanders (Belgium)	Just over 2000 (W. Rombaut, pers. comm., 6 May 2021)	2050 (W. Rombaut, pers. comm., 6 May 2021)
Italy	1124 (Survey of 412 Social agriculture initiatives - CREA, 2020)	15,000 (F. Di Iacovo, pers. comm., 30 June 2021)
Ireland	Over 830 participants with over 8500 participant days since late 2016/2017 (H. Doherty, pers. comm., 1 May 2021)	9430 participant days (H. Doherty, pers. comm., 1 May 2021; Kerry Social Farming, n.d.)

Typically, the **main national/regional Social agriculture associations represent an important part of the national/regional Social agriculture landscape** and thus provide an accurate estimate of the lower limit of the number of participants in their country/ region (Table 1). In the Netherlands, there are about 25,000 participants in the farms represented by the Federation Agriculture and Care (Table 1). Based on conversation with national experts, the authors estimated the total number of participants in the Netherlands at approximately 35,000.

According to the Flemish expert, the largest Flemish Social agriculture association captures over 95% of the social farms in Flanders.

In Italy, there is no accurate data on Social agriculture participants. Difficulty in gathering data arises for a number of reasons. First, there is no one national association for Social agriculture recognised by all actors that captures data and monitors activity. The overall agricultural sector is represented by three national agricultural trade union associations - Coldiretti, Confagricoltura and Confederazione Italiana Agricoltori - all of which have different

[1] This is an estimate and includes participants in social farms that are not represented by the main national/regional association(s) in contrast to the previous column.

histories, target members and political affiliations. In addition, co-operatives have their own representative organisations. Social agriculture enterprises are also represented by two national associations: Forum Nazionale Agricultura Sociale which was established in 2011 to pursue legislation in this sector, and the Associazione Nazionale Bioagricoltura Sociale which was established in 2018 and includes private farms, co-operatives and associations involved in organic production and social farming. Secondly, social services and public agencies implement within the territories a very wide variety of interventions aimed at the social inclusion and integration of participants, which include labour and social integration in private farms and co-operatives. Thirdly, national data from the Italian National Institute of Statistics (ISTAT) cannot be used to aggregate data because participation in more than one service would lead to double-counting of participants. The Center for Research in Policies and the Bioeconomy identified 1124 participants based on a survey of 412 Social agriculture initiatives. However, based on his experience, F. Di Iacovo, Italian Social agriculture expert, estimates that there are about 15.000 participants in labour inclusion initiatives every year (personal communication, 30 June 2021).

The Irish Social agriculture sector usually expresses the demand in terms of "participant days" rather than numbers of participants, in order to capture the duration of farm visits made by participants. Social Farming Ireland, the main organisation supporting the development of the sector in Ireland, provided an estimate of over 8500 participant days since late 2016/2017 equating to 830 participants (Table 1). Regarding the estimated number of participants in social farms at national level, we again can only give an estimate of the number of participant days. Additionally, participant data from Kerry Social Farming, a regional Social agriculture network organisation, is only available in the format of participant days.

Supply

Below, we present two variations on the number of social farms for the Netherlands, Flanders (Belgium), Italy, Austria and Ireland (Table 2).

Table 2: Quantitative data about key supply indicators for Social agriculture

Country/ Region	Number of social farms represented by main national/regional association(s) (around 2020)	Estimated number of social farms at national/ regional level (around 2020)[2]
Netherlands	850 (M. Fischer, pers. comm., 6 November 2020)	1250 (Hassink et al., 2020)
Flanders (Belgium)	979 (Steunpunt Groene Zorg, 2020)	1000 (W. Rombaut, pers.comm., 6 May 2021)
Italy	228 social farms officially recognised by the Italian regional governments (Borsotto and Giarè, 2020)	3000 (F. Di Iacovo, pers. comm., 30 June 2021)
Austria	536 (Green Care Austria, 2021; G. Wiesinger, pers. comm., 11 June 2021)	699 (G. Wiesinger, pers. comm., 11 June 2021)
Ireland	175 (H. Doherty, pers. comm., 1 May 2021)	195 (H. Doherty, pers. comm., 1 May 2021; Kerry Social Farming, n.d.)

[2] This is an estimate and includes social farms that are not represented by the main national/regional association(s) in contrast to the previous column.

As can be seen from Table 2 above, **the vast majority of social farms are represented by the relevant national/regional association**. The number of Dutch social farms at national/regional level (around 2020) is estimated by Hassink et al. (2020) at 1250. In Flanders, almost all social farms are represented by the main regional association. The total number is estimated at 1000 Flemish social farms.

Regarding Italy, there is no one national organisation that includes most social farms. Instead, there are farms that (1) based on regional legislation, have officially requested to be recognised as social farms and have undertaken a comprehensive application process through their regional governments, and (2) those that have not been registered but carry out social inclusion activities (Social agriculture) via contracts and agreements with the local social services. Those in the first category are registered in regional lists of social farms: they aim to be more recognisable to diverse public institutions (Borsotto and Giarè, 2020), and are also able to more easily access public funding. In addition, they can have favoured access to local open-air markets and to school and hospital cafeterias through public procurement. As of October 2020, 228 farms are registered as social farms in the regions that developed legislation and the criteria for social farming recognition in Italy. Of the 228 registered social farms, 80% are owned by private agricultural farms and 14% are social co-operatives. The second category are generally involved in social and labour inclusion projects initiated by local social services aimed at a wide variety of participants. As the Italian expert Prof. F. Di Iacovo (personal communication, 30 June 2021) suggests, while there is no accurate data on the number of social farms, it is plausible there are between 3000 and 3500 enterprises which engage in Social agriculture practices and activities on a regular basis.

In Austria, the majority of social farms are educational farms linked to the Schule am Bauernhof ("School on the farm") association. The social farms belonging to this association cater to schools and provide them with an educational activity of half day or one day's duration. Out of the 536 Austrian social farms represented by main national associations (around 2020), 113 belong to Green Care Austria and 423 belong to Schule am Bauernhof. From the estimated 699 Austrian social farms at national level (around 2020), 423 belong to Schule am Bauernhof and 276 other social farms focus on integration and care. In 2021, of the estimated 276 Austrian social farms focused on care and integration, 113 farms (41%) belong to the Green Care Austria association.

In Ireland, just 20 farms appear to be represented not by Social Farming Ireland, the main national support association, but by another regional network organisation, namely Kerry Social Farming. This brings the estimated total to 195 Irish social farms.

Providers

Mammadova et al. (2021) give an overview of the diversity of Social agriculture providers: "The organisational structure of farms engaged in Social agriculture varies widely across Europe. Enterprises range from small-scale family farms, practicing extensive agriculture, and undertaking Social agriculture as a diversification opportunity, to more intensive enterprises operating commercial farm activities producing crops or animal breeding. We also see examples of institutional social farms in which the farm is part of a health or social care institution, where health care professionals are on the payroll of that organisation. In addition, there are many examples of so-called social agricultural enterprises in which the agricultural activities and land is owned and managed by a group of social entrepreneurs or, in some cases, local community organisations."

As noted earlier, when analysing the different

ways in which Green Care in agriculture is organised and the different parties involved, three main frameworks or discourses of Social agriculture can be distinguished (Dessein and Bock, 2010):

(i) multifunctional agriculture,
(ii) public health and
(iii) social inclusion.

Some general characteristics of Social agriculture providers can be discussed in relation to each of these frameworks as seen in Table 3 below. It should be noted that in practice, the different **frameworks constitute a continuum rather than a sharp delineation**, and therefore some initiatives exhibit hybrid characteristics.

Table 3: Overview of the three main Social agriculture frameworks

Framework	Multifunctional agriculture	Social inclusion	Public health
Main activity	Commercial farming on family farms and care activities	Focus on social inclusion in commercial farming activities	Focus on care services
Farm setting	Private/family farms	Private/family farms, co-operatives or institutional farms (e.g. rehabilitation centres, prisons)	Private or institutional farms (e.g. hospital gardens)
Role of private farmer	Farm setting and Social agriculture activities	Farm setting and/or Social agriculture activities or no role	No role or farm setting
Role of care professional	No role or monitoring activities	Social services possibly provide farm setting and/or care activities or no role	Care activities
Supervision of the activity	Farmer	Farmer or social services	Care professional
Main reason / Enabling factors	Diversification and social motives	Social inclusion	Health care
Who is paid?	Farmer or nobody (on a voluntary basis)	Participant (or farmer)	Care professionals receive wages. Farmers might receive payment for providing the farm setting.
Main funding arrangement	Funding to farmers	Funding to Social agriculture initiatives or participants	Funding to Social agriculture initiatives

In the framework of **multifunctional agriculture**, Social agriculture takes place on private or family farms under the supervision of the farmer. The farmer integrates commercial farming and Green Care activities on the same farm (Dessein and Bock, 2010). Here, the care component is seen as a way of producing additional income on the farm. Green care on the farm is an economic activity under this framework but Roest (2005) reported that farmers often mention social motives as the most important driver for incorporating the care component in their farm. Farmers are generally not health professionals. In addition, some of these social farms sell their agricultural products for a higher price by marketing their Green Care engagement (Dessein and Bock, 2010). Social farmers can be paid for the care activities by different actors, such as health care institutions, health insurance companies

or through the participant's health care budget (Elings and Hassink, 2006). The social farm gives participants an informal setting that differs from regular health care settings (Elings and Hassink, 2008). Importance is given to the immersion of participants in an "ordinary" farm context, doing useful work and interaction with wider society.

Participants in Social agriculture activities under the **social inclusion framework** are mainly vulnerable or "at-risk" groups that can engage in manual labour without requirements for particular skills (Dessein and Bock, 2010). Social agriculture activities and practices can be organised in rehabilitation centres, prisons or in social cooperative, or community settings and be paid for by social services budgets. In addition, these practices can also be organised on private farms in which the private farmer can be the provider of both the Social agriculture activity and the physical environment (Dessein and Bock, 2010). The participants may receive compensation for their work, paid for either by the social services or by the farmer. In certain countries, farmers can receive compensation from social services for employing vulnerable or "at-risk" individuals.

In the framework of **public health,** the green environment and manual labour is considered of therapeutic value for people with special needs. The farmer can provide the green environment, the farm setting and the opportunities for labour, yet he/she is not a key actor in the therapeutic process (Dessein and Bock, 2010). The professionals interacting with the participants are health professionals and/or work supervisors. In the public health framework, the physical environment can be hospital gardens, institutional farms or private farms. Social agriculture can be financed by Ministries of Health, health insurance companies, private health associations or directly by participants (Dessein and Bock, 2010). The professionals working on these social farms under this framework are usually formally employed and receive wages (Dessein and Bock, 2010).

Participants and beneficiaries

We use the term **participants** to refer to those who **depend on the farm's care services**, and they are the **direct and primary beneficiaries** of Social agriculture services. However, in addition to these direct beneficiaries, there are a number of other stakeholders that can benefit from Social agriculture. These include the farmer as well as the wider community and society. We use the term **beneficiaries** to refer to this **larger group of stakeholders who benefit from Social agriculture**.

Participants are generally i) people with special needs or ii) vulnerable or "at-risk" groups (Mammadova et al., 2021). The green environment and the opportunity to engage in meaningful work is considered of social and therapeutic value for such individuals. Those with special needs include people with physical or intellectual disabilities, mental health issues, people with autism and people with dementia. If the participants are vulnerable or "at-risk" groups, then "the goal is to re-establish the habit of working, build up knowledge and skills and build self-esteem" (Dessein and Bock, 2010). Vulnerable or "at-risk" individuals include homeless people, former inmates, people with an addiction history, youth at risk of alcohol and drug dependency, youth with behavioral problems, women at risk of domestic violence, refugees and asylum seekers, people with learning difficulties, people with burn-out, school drop-outs as well as people who are unemployed for long periods.
Nowadays, there is an **increasing diversity in the profile of participants** seeking care and

social integration through Social agriculture - as highlighted in the focus group with national Social agriculture experts - a subject to which we return below. There is a growing trend for the provision of education to school dropouts through Social agriculture as well as the provision of care to the elderly (for example those with dementia). Other emerging participant groups mentioned during the focus group are refugees, asylum seekers and cancer patients.

Mammadova et al. (2021) point to additional stakeholders and beneficiaries in the following way: "Besides direct beneficiaries, these initiatives address a societal need and thus work in close co-operation with local and national government agencies, local governments, public healthcare agencies, social care centres, university students and volunteers, to provide opportunities for employment, space for social engagement and by contributing to rural development and stemming of outmigration from rural areas." Arguably, social farmers themselves can also be seen as beneficiaries. Aside from any economic gain arising from additional income generated, they frequently report benefits from increased social contacts, reduced social and occupational isolation and an enhanced public image for farming, as a result of engaging in social farming activities (Kinsella et al., 2014).

Courtesy Social Farming Ireland

Funders

Vivo, Ascani and Gaito (2019) note that a key objective of the EU Europe 2020 strategy has been to address poverty and marginalisation, focusing on active inclusion, labour market integration and overcoming of discrimination for those with disabilities, ethnic minorities, immigrants and other vulnerable groups. They point out that social farming has been explicitly addressed in multiple 2014-2020 programming documents as a tool for achieving the above mentioned goals.

Funding mechanisms include the European Social Fund (e.g. supporting actors in the social economy); the European Regional Development Fund (e.g. supporting social infrastructure) and the European Agricultural Fund for Rural Development (EARDF) (e.g. supporting social farming as a farm diversification strategy and innovation in service delivery). Specifically, social farming activities are programmed in various Rural Development Programme (RDP) measures across the Member States. For example, in Italy, all regions with one exception have identified social farms among the interventions that can be financed. Within the Rural Development Programming context, social farming is framed as an opportunity for social inclusion, innovation, an instrument of social and economic development in rural areas, a mechanism for the creation of networks between farmers and social service providers, a means by which diversification can be expanded, and a social innovation process by which agriculture can become an instrument of welfare for the benefit of rural communities (Vivo et al., 2019).

According to Di Iacovo (2020) social farming across Europe can be framed according to a number of different **welfare models** which in many cases have **implications for the associated funding regimes**.

1. Under a **Northern European model**, the presence of strong state intervention driven by the public social health system creates an environment that economically recognises farmers' participation in the social protection network and their provision of services for selected targeted groups. Economic sustainability is mainly due to public support.

2. Under a **Workfare model**, prevalent in Germany and France, there is little recognition for farmers. Typically, professionals such as social workers are engaged in supporting disadvantaged people in vocational training in large and medium size structures, in a protected environment, with public support.

3. The **Anglo Saxon model** represents a charity model, underpinned by foundations or NGOs that support social farming, in which agricultural activities are used to support the daily life of disadvantaged people and the associated agricultural processes are only marginally based on their economic sustainability.

4. In the **Eastern European model**, welfare systems are characterised as emerging from a context of Soviet institutional intervention towards a European framework. Ministries of Agriculture (Czech Republic, Poland, Hungary) and Labour and Social Affairs (Czech Republic), as well as the European Social Fund (ESF), support social farming initiatives, which can range in size from small-scale (e.g. therapeutic communities) to large-scale interventions (in the case of labour market inclusion).

5. In the **Mediterranean welfare model**, social farming is organised among different stakeholders in a "welfare mix" that includes the public sector, the private sector, the third sector (NGOs), the fourth sector (families) and an emerging fifth sector – namely "responsible" firms in the agriculture sector. In such settings, recognition of farmers may not always come from direct public payments but may be activated by principles linked with recognition of gifts and reciprocity in the community.

In the Netherlands, social farmers have

benefited in recent years from the increased availability of personal budgets for clients which began in 1995, enabling the farms to make direct contracts with people in different target groups. Furthermore, neo-liberal reforms meant that, from 2002, there were more opportunities for farmers to acquire AWBZ accreditation[3] (AWBZ being the general insurance scheme for special medical costs), leading to an additional cadre of social farmers who had direct access to the budgets of health insurance companies. Hassink et al. (2020) note that revenue from social farming has increased considerably in recent years due to professionalisation, specialisation, an increase in the number of participants per farm and the provision of a wider range of services. They note that the annual revenues of the main regional social farm organisations have increased considerably from €11.3 million in 2011 to €88.6 million in 2018. Allowing for the fact that many activities take place outside of the regional organisational structure, they estimate the total revenues of the sector in 2018 at €250 million.

In Flanders, according to Dessein et al. (2013), RDP funding has been a long-standing source of funding for social farming, based around subsidies of 40 euro per day (irrespective of the number of participants). This subsidy is paid by the Flemish Department of Agriculture and Fisheries to compensate the farmer for providing care services, a scheme that is unchanged since its introduction in 2005. Only professional farmers (i.e. those with farms of a certain size and with focus on the farming activity[4]) that collaborate with a welfare or commissioning organisation can receive this subsidy. This accounts for about two-thirds of all Flemish social farms. The remaining one-third are accounted for by those that do not meet the requirements to be a professional farmer, but also organisations such as horse riding schools, children's farms etc. which are not reimbursed for their Social agriculture activities. In 2017, an important change was the introduction of a personal budget system for people with disabilities, allowing them to spend their budget on specialist health care facilities but also on other services such as social farms. This promotes the viability of social farms that do not receive a subsidy from the Flemish Department of Agriculture and Fisheries.

In Italy, funding for Social agriculture has been mainly allocated through the Rural Development Programmes of the EARDF, principally through two specific measures (Borsotto and Giarè, 2020). These are: Measure 6.4 dedicated to "Support for investments in the creation and development of non-agricultural activities"; and Co-operation Measure 16.9 dedicated to "Support for the diversification of agricultural activities into activities concerning health care, social integration, community-supported agriculture and environmental and food education". The latter specifically supports the implementation of Social agriculture practices in a farm supported by a network of public-private entities. However, at present there is no data available on the amount of funding specifically dedicated to Social agriculture during the 2014-2020 programming period. A study conducted by Coldiretti (2020) shows that about 24% of funding for Social agriculture derives from the RDP (2014-2020), 13% from regional and provincial funds, 9.7% from foundations, 6% from the ESF and ERDF funds and the rest from other types of funding including from municipalities (Coldiretti, 2020, p. 84). In general, however, social farming activities are not reimbursed by public health care, since participants rather than farmers are paid for their labour.

In Austria, Social agriculture is supported by the Austrian Rural Development Programme (RDP) and receives funds from the national and provincial governments. Social farmers can apply for RDP funding for investments, training and education (G. Wiesinger, personal communication, 13 June 2021). In general, social farming activities are not reimbursed by the

[3] The heavy forms of support for adults went over from AWBZ to Long-Term Care Act (WLZ) (Meulen et al., 2019).
[4] For more detailed information about the requirements to receive a subsidy see Departement Landbouw and Visserij (n.d.).

public health and social insurances. Anyhow, the Austrian public health and social insurance system provides pensions to their elderly clients and personal budgets to their disabled clients. Consequently, social insurance clients can use these budgets to pay for Social agriculture activities (Böck et al., 2016). Under the Schule am Bauernhof scheme (educational farm visits for schools), the Ministry of Agriculture, Regions and Tourism fixed the cost of the activity to €160 for a half day, €200 for a whole day and max. €800 € for a farm week (with overnight stays at the farm) for the whole class (G. Wiesinger, personal communication, 13 June 2021). This cost has to be paid by the schools or the students.

In Ireland, currently, the main funding source for social farming is a national scheme of the Department of Agriculture, Food and the Marine (DAFM) under its Rural Innovation and Development Scheme. In 2017, it provided over €800,000 to three social farming initiatives and more recently, €400,000 is being made available under the same scheme to support the development of a National Social Farming network (Social Farming Ireland, 2019). Other sources of funding include Ireland's SICAP (Social Inclusion and Community Activation Programme) which is funded through the national Department of Rural and Community Development (DCRD) and the European Social Fund (ESF) under the Programme for Employability, Inclusion and Learning (PEIL) 2014-2020. Other EU funding sources of relevance have been EU INTERREG which provided almost €700,000 to fund the establishment of Social Farming Ireland (SFI) in 2014, supporting the animation and development of social farming on a cross-border basis on the island of Ireland. Social farming initiatives have also received funding via a number of EU-funded ERASMUS+ projects related to training needs for social farmers in Ireland. With regard to funding arrangements for social farming services at the individual farm level, SFI frequently serves as a "broker" between the farmer and numerous commissioning organisations (disability, mental health, youth work, etc.) to agree a daily payment rate for placements (Vivo et al., 2019).

Quality Assurance and certification

Dutch social farms can obtain the quality mark "Kwaliteit Laat je Zien" (Translated as: "Quality is something you show") from the **Federation Agriculture and Care**. The quality mark has existed since 2002 and aims to help social farmers to comply with laws and regulations in an accessible way (Federatie Landbouw en Zorg, 2021). The quality mark facilitates obtaining payment for the provision of the Social agriculture activities (J. Hassink, personal communication, 29 April 2021). The quality mark has been refined several times. In the latest revisions much emphasis was placed on the client's opinion and on how satisfied they are with their roles and tasks on the farm. In order to use these surveys for quality improvement, a client satisfaction system has been introduced which monitors their satisfaction each year on each member farm. If members meet the quality requirements, they receive the quality mark "Quality is something you show". Having obtained the quality mark, quality control is carried out every three years (J. Hassink, personal communication, 29 April 2021).

In **Flanders**, there is no quality label or certification system for Social agriculture. However, to receive subsidies, the social farmer has to collaborate with **a welfare or commissioning organisation** (W. Rombaut, personal communication, 6 May 2021). It is the welfare organisation that has to achieve certain quality standards and then chooses if they want to collaborate with a certain social farm. In addition to placing their client on a specific social farm, the welfare organisation is also responsible for supporting the social farm and monitoring the process (W. Rombaut, personal communication, 6 May 2021).

In **Italy** there is no national certification scheme. **Nine regions have developed specific regional legislation** for Social agriculture whereas all other regions, except for one, have, since the adoption of the national legislation, included specific articles on Social agriculture in their regional legislation. These regions have also developed a registry to which farms can apply to become registered social farms, and thus be more recognisable by public institutions as well as by the consumer and have preferential access to local markets or public procurement. For example, in the Veneto Region which has 35 registered social farms, requirements are mainly related to training and to the structure of the farm (Regione del Veneto, 2020). These include the presence of an agricultural operator, social enterprise or other entity; a commitment to adopt criteria of ethical responsibility and environmental sustainability with a specific service charter; attendance at compulsory training courses (i.e. 100 hours with a 20 hour follow-up course every two years); a minimum

area of agricultural land managed by the social farm of at least 10,000 square meters and third party liability insurance contract. The Social agriculture registry ensures commitment by the social farm to specific Social agriculture activities and to hosting specific target groups (e.g. labour inclusion of people with a disability or of migrants, educational activities for school children), which are identified at the time of registration. Depending on the activities undertaken, the social farm collaborates with the social services or other relevant entities to define roles and responsibilities. Registered farms can more easily access funding from the **Rural Development Programme**.

In **Ireland**, structures and processes established by **Social Farming Ireland (SFI)** provide much of the quality control and quality assurance that applies to Irish Social agriculture (H. Doherty, personal communication, 01 May 2021). Those who become social farmers with Social Farming Ireland go through a process of recruitment, vetting, induction and training and receive ongoing support and mentoring from them. Farmers complete a "Training for Practice" course, which is a minimum of two days' training which contains sessions on subjects such as Social Farming practice, safeguarding, working with vulnerable people, farm health and safety, inter alia. All social farmers with whom Social Farming Ireland work are vetted via the policing authority. The measurement/assessment of participants' progress is also inbuilt into SFI's support mechanisms. Participants on SFI-supported placements are facilitated to develop an Individual Support Plan (ISP) and progress reviews for placements are an integral part of the process.

In **Austria**, social farms focused on care or integration can be certified by **"Green Care Austria - Wo Menschen aufblühen"**. This certification ensures the quality of care services on farms and provides two types of certification (Green Care Austria, n.d.). These comprise an internal certification, carried out by Green Care Austria, and an external certification, carried out by an independent certification body (SystemCERT). Only social farms who offer certain specified activities can apply for the internal certification provided by Green Care Austria. Within three years of the date of internal certification, those social farms have also to be reviewed by the external certification body. A subsidy provided via RDP funding covers 40% of the external certification cost (Green Care Austria, n.d.; Green Care Austria, 2021).

As mentioned earlier, the majority of Austrian social farms focus on educational tours for schools and are linked to the **Schule am Bauernhof** scheme. To become a "School on the farm" provider, the candidate has to complete a certification course[5] provided by the Rural Training Institute (Ländlichen Fortbildungsinstitutes (LFI)) (Schule am Bauernhof, 2021). The certification course takes 10 days and assesses the organisational, personal and technical skills necessary to design and implement school visits on the farm.

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[5] Actively managing the business, not being a hobby farm and provement of basic agricultural training or practical experience are prerequisites

CASE STUDY REFLECTIONS AND SYNTHESIS

Notwithstanding the diversity in the Social agriculture landscape which is evident above in relation to the case studies, a review of the foregoing discussion suggests that there are some **key dimensions of social farming** which can serve as a basis for comparison. In this section, we present three such characteristics under the following headings: **the most common organisational structure, the financing model and the most relevant framework** (Table 4). Most of the information in this section is based on interviews with national Social agriculture experts, named in the **acknowledgements**, as well as the knowledge of the authors of this Market Outlook.

Table 4: Key characteristics of Social agriculture in case studies

Country/ Region	Most common organisational structure	Financing model	Relevant framework
Netherlands	Private (family) farms	There are 2 main financing streams. Municipalities pay for youth care, and the lighter forms of support for adults with the general health care budget. The more intensive forms of support for adults are reimbursed at national level under the Long-Term Care Act (van der Meulen et al., 2019).	Multifunctional agriculture with characteristics of the Public health framework
Flanders (Belgium)	Private (family) farms	Professional Flemish farmers[6] who provide care services and collaborate with a welfare organisation receive a subsidy of max. €40/day independent from the number of participants from the Flemish Department of Agriculture and Fisheries.	Multifunctional agriculture
Italy	Third sector: mainly co-operatives Private (family) farms	In labour inclusion practices, the health service pays people with a disability or "at risk" to work on a farm. RDP funding supports the development of new public-private partnerships that can animate, develop and implement new practices in the farm, as well as infrastructure requirements for Social agriculture.	Social inclusion
Ireland	Shift has occurred in the last 10 years approximately from predominantly institutional farms to the emergence of private (family) farms providing social farming activities, which are commissioned by social/healthcare service providers.	Many farmers get paid by the commissioning organisation.	Historically, a social inclusion focus, but more recently a multifunctional agriculture focus is emerging as more family farms engage in Social agriculture activities.
Austria	Private (family) farms	Farmers are paid by the participants. Most potential Social agriculture participants receive budgets/allowances from the public health and social insurances which they can use to pay for the Social agriculture activities.	Multifunctional agriculture

[6] For more detailed information about which conditions the farmer has to comply with to receive a subsidy, see Departement Landbouw en Visserij (n.d.).

Courtesy Social Farming Ireland

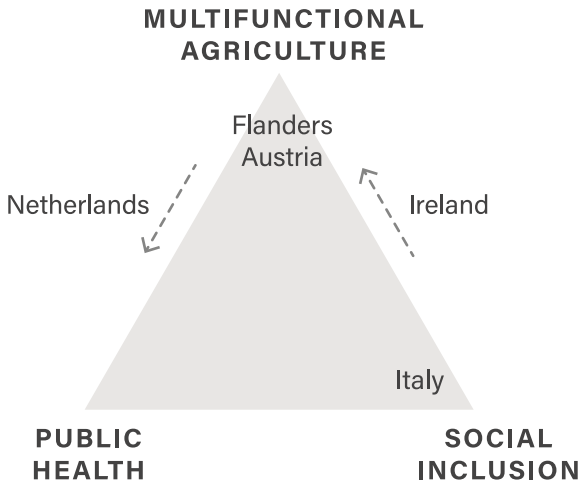
In the Netherlands, Flanders, Austria and Ireland, private initiatives running social farms predominate (Table 4). Usually, they are family farms, attracted by the social motives of running a social farm and looking for an income diversification opportunity. However, the fact that these social farms are most commonly private initiatives does not mean that they operate in isolation. In each of these case studies, save for the case of Italy, there is a strong federation or association supporting and connecting the social farms, as was described in the country profiles. In contrast to these four case studies, in Italy, it is often co-operatives who start and run social farms.

In the Netherlands and Flanders, the social farmer is paid by the government. In the Netherlands the payment comes from health care budgets of the national government while in Flanders the payment is provided by the Department of Agriculture and Fisheries of the Flemish government. In Ireland, the National Social Farming Office is funded by the Agriculture Ministry. They facilitate commissioning arrangements between social/health care providers and farmers as well as providing training and support (Mammadova et al., 2021). In practice, many farmers are paid by the commissioning organisation. In Austria, the participants pay the farmer, usually from their personal budgets received from the public health and social insurance authorities. In Italy, there are different approaches. Usually it is not the social farmer but the participants who are paid a small monthly fee by the government, allocated through the health services. Some co-operatives that host residents (i.e. participants that reside there) usually get funding from the health services for their social services, and may use part of the funding to establish and run the Social agriculture initiative. However, in

order to become a farm recognised for Social agriculture, 30% of the revenue must come from agricultural production.

As outlined earlier, the most relevant framework which can be used to characterise social farming in Italy is that of social inclusion (Table 4) (Dessein and Bock, 2010; Di Iacovo and O'Connor, 2009) (Figure 2). Social agriculture in Austria and Flanders aligns most clearly with a multifunctional agriculture framework (Dessein et al., 2013; D. van Meel, personal communication, 9 June 2021). In the Netherlands, while there are some characteristics consistent with a public health framework, multifunctional agriculture is the most relevant framework. Dutch social farming initiatives are mostly privately owned but in many cases the income comes solely from health care. Also there are examples of institutional social farms in which the social farm is owned by a health care institution. In Ireland, there has been a shift from the provision of social farming services within big health/social care institutions towards smaller private social farms. Consequently, Irish Social agriculture can now be best represented through the multifunctional agriculture framework. A final point is that, while the purpose of the different framings is to distinguish different ways in which Social agriculture is organised, in practice, Social agriculture initiatives often share characteristics of different frameworks (Figure 2).

Figure 2: Position of the five case studies within the Social agriculture frameworks. Arrows show how the frameworks in the Netherlands and Ireland have been evolving recently.



OUTLOOK: THE FUTURE OF SOCIAL AGRICULTURE

This section is largely based on the focus group undertaken with Social agriculture experts from the Netherlands, Flanders, Italy and Ireland, on 25 May 2021. Subsequently, it was enriched with insights from the Austrian Social agriculture expert. From the **focus group** discussions, the Green4C Social agriculture team identified **three recurring key messages** which are discussed below.

Broadening of target groups and activities in an already multi-sectoral discipline

Social agriculture intersects across different sectors such as agriculture, health care and social services. However, in all five case studies a **more diverse demand for Social agriculture is emerging**. Whereas traditionally, Social agriculture catered to the needs of participants with a disability or mental health conditions, there is nowadays an increased demand to cater to the needs of the elderly, school children, school drop-outs, cancer patients, refugees, asylum seekers etc.. D. van Meel, our expert from Austria, commented that although the Social agriculture sector is diverse in Austria, the focus on children that attend a one-time visit to a farm means that for other potential participants (e.g. elderly, people with an addiction, mental illnesses, depression) there are long waiting lists.

An increasingly diverse group of participants requires a more diverse supply of activities. Experts from Italy, Ireland and the Netherlands all mentioned the increasingly important role of social farms in providing **educational services**. There are several cases where school drop-outs responded very well to educational initiatives on a social farm. R. Moruzzo, our Social agriculture expert from Italy, said she is happy to see an increase in intergenerational activities as one of the latest developments in Social agriculture in Italy. Diversity in activities also demands diversity in the types of entrepreneurs who provide Social agriculture initiatives. For example, education professionals might play a more important role in the future if demand for educational services in social farming continues to increase. At the same time, experts emphasised that Social agriculture should continue to recognise the unique contribution provided by contact with ordinary farmers, their families and the participants.

The role of **training and knowledge sharing** in the broadening of the Social agriculture sector was highlighted by our experts from Ireland and Italy. Social Farming Ireland aims to adapt quickly to the diversified demand by providing more tailored and specific training. Peer-learning and knowledge sharing among farmers may also play an increasingly important role in the future in Ireland. Our Italian expert noted the importance of training for farmers and farmers' associations to nurture the Social agriculture sector.

Emerging demands create an opportunity for social farming entrepreneurs who can innovate and create sustainable business models. However, we recognise that governments will continue to play a role in providing subsidies to the sector because the societal benefits of Social agriculture practice extend beyond those of the individual to society as a whole. In Flanders, Social agriculture funding mechanisms support participants that need a one-to-one relationship with the farmer and who can also undertake tasks on the farm as appropriate. Recent changes mean that social farms can also cater to participants who need more intensive care and are not capable of providing assistance to the farmer. This change was facilitated by the introduction of personal

budgets which allows people a choice in terms of identifying and funding their own care needs (including social farming activities). Also in Ireland, a personal budget scheme for Social agriculture participants has recently begun to emerge. Alongside these developments which support individual and families' choices, **national and regional governments** remain important actors in supporting diversity in social farming through **regulatory and funding instruments**.

Moreover, the future of Social agriculture would also benefit from more diversity in terms of farm settings. We are living in a society with increasing rural abandonment and more and more urbanisation. In the future, social farms could bring added benefits to rural areas affected by depopulation, by providing a physical and care space not only to disadvantaged participants, but also, in innovative ways, to the community at large. At the same time, social farms in urbanised areas and social farms that make **connections with urban initiatives** could play an important role. An indisputable advantage would be greater accessibility to farms and community gardens for participants living in urban areas where an increasing number of people face health issues. In urban areas, individual and community wellbeing could be promoted by just being in a green environment close to the city. Furthermore, awareness of the benefits of green space, in terms of its proximity to urbanised areas, increased hugely during the COVID pandemic.

Courtesy L'Olivera

Need for communication to raise awareness and increase visibility

Some of the focus group experts suggested that in recent years the visibility for social farming has increased and all agreed that this **visibility should be further improved through communication and awareness raising**. This is a crucial condition for the sustainable future of Social agriculture and is **linked strongly with obtaining sufficient and secure funding**. Social agriculture can serve as a response to a range of environmental and societal challenges, it can offer a very high quality experience for the participant, it can be economically beneficial and have a broader positive societal impact. This has to be communicated to society, policy makers and farmers.

Experts in the focus group are convinced that Social agriculture is a real win-win situation: Social agriculture can be beneficial for participants, farmers and society at the same time. D. van Meel said that we should add a third win to represent the beneficial effects that Social agriculture can have on the environment. "By maintaining smallholder structures, regional, seasonal, organic and ecological agriculture, nature can also thrive under Social agriculture" (D. van Meel, personal communication, 9 June 2021). In all communications around social farming, the **win-win-win situation should be emphasised**. So greater effort needs to be placed on communicating the benefits of Social agriculture.

Experts also expressed the view that currently, farming can have a negative image among the wider society in many European countries. As M. Elings (scientist at Wageningen University & Research) said "People like urban agriculture but dislike the big farms." This is often due to controversies related to sustainability or food safety for example. By communicating about Social agriculture, society can become better informed about the role of different farms in food production and environmental protection. Experts also mentioned promoting the presence of urban social farms, open to the public, as a way of raising awareness. In addition, there is a societal trend for young people to get back to nature and farming. In countries where Social agriculture is not already established, this represents an opportunity to make Social agriculture trendy which would help the communication and awareness raising. **National Social agriculture network associations and federations** were also identified as playing a key role in the communication and promotion of Social agriculture.

Finally, experts also agreed that the promotion and communication of Social agriculture has to be paired with **research and informed decision making**. R. Moruzzo mentioned the necessity to have evaluation tools to assess the impact of Social agriculture. Case studies and examples of best practices have to be developed and an evidence base developed based on the experience of participants with different profiles.

Need for targeted and secure funding to create a sustainable Social agriculture sector

The experts agreed that Social agriculture has an important contribution to make to economically, ecologically and socially-sustainable food production systems and to the provision of high quality care to its participants. At the same time, they argued that **current funding mechanisms do not adequately support the development of this important sector**. As J. Hassink stated, "The funding of social farms is often not in line with the demands of the diverse people on the farm, funding gets more and more strict... but people in the farm are really diverse... and the funding for all these different types of participants is different and makes it really complicated." A resilient future for social farms with an increasingly diverse range of participants demands **more flexible, targeted and easily accessible funding mechanisms**. J. Hassink continued "At the same time, it would be interesting to integrate funding of social care with education, inclusion and environmental services. To make this combination of services that are agricultural, environmental and social ..would highlight the unique values of the social farming contexts."

All the experts agreed that funding is a problematic issue in Social agriculture. Access to funding and resources seems to be very insecure and difficult to obtain. J. Hassink noted that there is a recent reduction of funding for all types of day activities, including social farms, in the Netherlands. The lack of secure and sufficient funds is in part **related to the need to increase awareness and visibility**. If society and governments better understood the value of Social agriculture, the funding could follow. As A. Moroney said, "The interest in social farming must be turned into a reliable funding source over a lengthy period of time. It must move from being something that [commissioners and participants] try, towards something that is embedded, so that people who would benefit from social farming support are reliably able to do so."

Social agriculture can not only help the transition from a healthcare-centered model to a socially-embedded model for care and inclusion, it can also help to stop the loss of our European small- to medium-sized farms. Including a care component is often a welcome diversification strategy for small- to medium-sized farms. However, to assure the financial sustainability of those farms, funding that is stable should be made available. In the past, Social agriculture experts have been timid in pointing out the economic benefits for farmers because it can appear to be extractive on behalf of the participants. However, it is increasingly clear that Social agriculture can benefit everybody (participants, farmers and society) so the **sector could be more forthright in seeking support**.

Similarly, as for communication and awareness raising, **reputable research, examples of best practice and a stronger evidence base** about the range of benefits from Social agriculture will be necessary to secure funding for Social agriculture.

CONCLUSION

As this Market Outlook report shows, Social agriculture has been consolidating in Europe as an important element of different welfare models. While Social agriculture provides clear opportunities for farmers, it also provides an opportunity for welfare policies to address diverse social needs. For this reason, Social agriculture cannot be evaluated through revenue- and cost-economic indicators alone. Furthermore, social impact indicators which account for benefits accrued to individuals, as well as for benefits to the health and social services should be taken into account. As new social needs emerge, many of which are connected to large-scale trends such as post-COVID uncertainties about economic security, climate-induced migration, biodiversity losses, lifestyle issues connected to mental health and a whole host of non-communicable diseases, Social agriculture can provide answers. Even though Social agriculture in Europe differs greatly across different national contexts, these diverse experiences represent a wealth of ideas, experiences and opportunities for learning. No single system provides a one-size-fits-all solution, and no experience can flourish on its own. What strengthens the practice of Social agriculture is the presence of co-operation, partnerships and collaboration among public-private entities, associations, communities and citizens.

However, this Market Outlook also shows that we are not there yet. As Social agriculture is such a cross-sectoral discipline, it has to comply with the norms and regulations of different sectors associated with it, while at the same time facing difficulties in obtaining financing, compared to, for example, the "regular" or conventional health sector. The Social agriculture sector needs the opportunity to illustrate how its advantages and disadvantages compare to those of conventional health care provision. Given the evidence that Social agriculture can benefit all involved stakeholders, funding should also be made available for the sustainable financing of Social agriculture initiatives and the development of network organisations/federations. In addition, the important role of Social agriculture should be communicated widely so that initiatives become available for all those who it might benefit. Mammadova et al. (2021) suggest that "awareness about the important role that social farms can play in society needs a more systematic approach, one that can start by monitoring and evaluating the outcomes and impacts of pilot and established projects, and then by approaching policymakers with recommendations from practical examples." Thus, despite the positivity and optimism that prevails in the sector, more work needs to be done to ensure its stakeholders can continue along a viable path, be recognised and supported in public discourse, policy and practice for the important and meaningful work ahead.

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