

Abstract: Social agriculture is a fast-growing sector in Europe. There is a great diversity in the social agriculture landscape across Europe, depending on the national contexts. The settings in which social agriculture takes place, namely social farms, are innovative because they combine health care and social services with agricultural production. Different participant groups find their place on these social farms. Social agriculture can be beneficial for participants, providers, the environment and the wider society. In this paper, we give an overview of the social agriculture market situation in a selected number of European countries, namely the Netherlands, Flanders (Belgium), Italy, Austria and Ireland. The country focus is largely dictated by the composition of, and the resources available to the project team undertaking this study. To explain how social agriculture is organised in the different European countries reviewed, three main frameworks are used: a multifunctional agriculture, public health and a social inclusion framework. In each of the countries under review, specific regulations, funding mechanisms, cultural values and support organisations provide different contexts for the evolution of social agriculture. A Market Outlook for social agriculture in these selected countries is undertaken which addresses the demand for and supply of such services, the profile of providers and beneficiaries, the key issues relating to funding, policy, certification/quality standards and future trends impacting on the sector. To make the European social agricultural sector more sustainable, it is important to broaden the activities and target groups, raise awareness, increase visibility via communication and tailor and secure funding for the future.

Keywords: Social farming, social agriculture, market outlook, care farms

Highlights:

- The social agriculture sector is a swiftly developing sector in Europe.
 - Social agriculture can be beneficial for participants, providers, the environment and wider society.
 - Three main frameworks are used and a description of the social agriculture market is provided.
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1. Introduction

Social agriculture or social farming is a swiftly developing sector in Europe. In various countries, there are increasing numbers of examples of farms that combine farming with care or green workplaces that are open to vulnerable people. In Europe, different terms are used to define working with vulnerable people in agriculture. In this article, we use the term social agriculture to refer to all activities that make use of the agricultural context to provide care and social services (Di Iacovo and O'Connor, 2009). Social agriculture includes farms based in institutions (e.g., hospitals, care institutions or schools) that offer green or agricultural activities but also family farms that have expanded their business to include care activities (PROFARM, 2017). Social agriculture activities are those where the care and support of vulnerable people is combined with agricultural production (Mammadova et al., 2021). In addition, social agriculture is also a form of multifunctional agriculture in which farmers combine their agricultural production with other services such as care, recreation and farm sales, thereby creating added value through additional jobs, promoting community networks and making the countryside more attractive (Bassi et al., 2016; Borgi et al., 2019).

The benefits are multi-faceted. The combination of agriculture and care is not only of added value for the participants on social farms but also for the wider community in general. Additionally, social agriculture offers new perspectives, especially for rural youth, by attracting new and young farmers and thus helping to stem the rural exodus (Lanfranchi et al., 2015; Sponte, 2014). Studies show that farmers experience an increase in social contacts, feel less lonely and more appreciated by their community (Kinsella et al., 2016). Literature shows that contact with nature and having meaningful interactions are

important for people's physical, mental and social well-being (Hartig et al., 2014; Kuo, 2015; Tost et al., 2019). In addition, a green environment offers numerous positive effects such as reduced stress and better recovery after illness (Sempik et al., 2010). Studies on social agriculture show that working on a farm provides participants with a meaningful way of spending the day, in which they are addressed in terms of their capabilities rather than their limitations. The farm setting offers people a different environment with added value over and above that is provided by regular health care or social services (Di Iacovo and O'Connor, 2009; Elings, 2012).

The way social agriculture is organised differs widely between countries in Europe. The national context is a leading factor and the way in which social agriculture is embedded depends on various issues such as funding and the profile of the entrepreneurs and participants coming to the farm. Social agriculture is to some extent recognised by European policy but there is no general over-arching policy. The social agriculture sector is still very fragmented both at an international and even on a national level, which makes it difficult to get a clear view of its future prospects.

The aim of this paper is to provide an insight into the market outlook of the social agriculture sector in a selected number of countries in Europe. The research took place within the Erasmus+ Knowledge Alliance project entitled Green4C.⁶ The choice of countries studied is a reflection of the national composition and research expertise of the project team and is restricted to Italy, the Netherlands, Belgium (Flanders), Austria and Ireland. The Green4C project, funded by the European Union, is a three-year project (2020–2022) that aims to create new partnerships between universities and businesses to develop, support and strengthen the exchange of knowledge and practice in the field of Green Care (Mammadova et al., 2021).

Section 2 provides a brief overview of the wider European context for social agriculture. Section 3 describes the scope and methodology of this market outlook. Section 4 reports on the results of the analysis, by providing an assessment of the future demand for social agriculture (beneficiaries) and the supply of (providers) social agriculture services. This section also includes a review of the financial structures, policies and quality standards operating in this sector. Section 5 discusses the future prospects for the sector and Section 6 provides some concluding remarks.

2. The Social Agriculture Context

Social agriculture sits under the umbrella term of green care which Sempik et al. (2010) define as “a range of activities that promotes physical, mental and [social] health and well-being through contact with nature”. In recent decades, the targeted inclusion of disadvantaged people, or those with physical, intellectual, mental health or social challenges, into agriculture production and diversification of agricultural activities (multifunctional agriculture) has become known as social agriculture (Mammadova et al., 2021). Numerous other labels have been used to describe care activities that are offered on farm locations including social farming (Di Iacovo and O'Connor, 2009); care farming (Hine et al., 2008) and farming for health (Hassink and Van Dijk, 2006; Farstad et al., 2021). Irrespective of the different labels used, all of the activities referred to above use the farm setting to engage in physical activities and tasks related to farm production or maintenance of the landscape and the provision of services to promote mental and physical health (Briers et al., 2021).

More specifically, 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)

Social agriculture is a fast-growing sector in Europe (Hassink and Van Dijk, 2006; Di Iacovo and O'Connor, 2009). Social farm settings are innovative because they combine health care and social services with agricultural production. Different groups find their place on these social farms and participants are drawn

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to them for different reasons. The farm settings on which social agriculture takes place can serve as sources of daily activity, supported workplaces and/or residential places as well as sites for vocational training, education or labour reintegration (Elings and Hassink, 2008).

Social agriculture builds on the concept of a more inclusive agricultural sector and in some countries, is also linked to more sustainable production systems such as organic farming (Di Iacovo, 2020; Foti et al., 2013). In addition, we see in countries such as the Netherlands, that the concept also ties in with developments in healthcare. In the 1990s, the idea of socialisation of care emerged to address the need for greater inclusion for people with disabilities in society. Care provided on social farms is in line with this policy development (Elings, 2012).

Studies show that social agriculture has specific features that are of particular value to different participant groups. These core elements include access to a green environment, variety in activities, being part of a social community and the involvement of the farmer and his/her family. These elements ensure that participants have an enjoyable and meaningful daytime activity where they gain new skills and are part of a social community. The farm setting thus offers participants an informal non-medical care context that differs from the regular services in the health care sector (Elings, 2012; Farstad et al., 2021; Hassink et al., 2011).

Social agriculture has a long history and previous studies show an example from the beginning of the 13th century in Geel, Belgium where people with disabilities received care but also worked in agriculture together with the villagers (Roosens and Van de Valle, 2007). There are numerous accounts throughout the 19th and 20th centuries in different European countries of large-scale medical and social institutional settings incorporating a farm unit (Di Iacovo and O'Connor 2009; Parr, 2007). Such entities had a long-established practice of integrating patients/residents into the associated agricultural/horticultural work and this approach was justified on the basis of being therapeutic (Sempik et al., 2010) while simultaneously serving to reduce costs associated with running large-scale institutions (Di Iacovo and O'Connor, 2009). Concerns that such approaches were exploitative (Parr, 2007) resonate in discussions of more contemporary forms of social agriculture. However, addressing the "cheap labour" argument that frequently surrounds the issue of employment in social agriculture initiatives, Leck (2007) notes that such critiques fail to take account of the wider associated value that accrues to participants. In addition, he notes that the need to provide intensive support to participants can result in the profitability of the farming activities being reduced rather than increased.

In its modern incarnation, a concrete starting point for social agriculture can be difficult to identify in the European context, given the diversity in the evolution of national agricultural, healthcare, social care and education systems – all of which interact with the provision of social agriculture services. However, many accounts identify the 1960s as a turning point with the emergence of individual or community-based social agriculture initiatives, often driven by pioneering individuals and rooted in faith-based or anthroposophist principles (di Iacovo and O'Connor, 2009).

Since the 1950s European farms have become more industrialised through processes of specialisation, mechanisation and intensification underpinned by changes in agricultural policies which pushed the sector to its ecological and social limits (Wiskerke and van der Ploeg, 2004). At the same time in less densely populated areas of Europe, abandonment of farms and rural areas is an issue (Di Iacovo and O'Connor, 2009). Arguably, social agriculture offers the opportunity to address many of the consequences arising from these developments by offering opportunities to diversify rural activities, to strengthen the economic and social viability of rural communities, to foster the reconnection between the rural and urban context as between the farming sector and society in general (Borghetti et al, 2017).

Across Europe, social agriculture is organised in different ways, reflecting to a large extent how it is framed differently in different countries (Briers et al., 2021). The literature suggests that there are broadly three main frameworks, also called discourses, underpinning the organisation and operation of social agriculture in Europe. Dessein et al. (2013) talk about a *multifunctional agriculture* framework in which social agriculture is one of the multifunctional activities of a farm and thus contributes to economic and social sustainability. According to the *public health framework*, social agriculture mainly refers to activities

that fall under the provision of health promotion, rehabilitation and therapy. And finally, based on the *social inclusion* framework, social agriculture activities contribute to the reintegration of vulnerable people into society by offering activities on the farm (Dessein et al., *ibid.*). The way social agriculture is 'framed' influences and reflects the way it is organised in European countries.

Based on this categorisation, social agriculture in Germany, Austria and the UK seems to be organised more on the basis of public health framing. In Italy, social agricultural activities mainly conform to a social inclusion framework and the multifunctional agricultural framework is dominant in countries such as the Netherlands, Belgium, Ireland and Norway (Dessein et al., 2013).

3. Scope and methodology

As outlined above, this paper draws upon work undertaken within the Erasmus+ Green4C Knowledge Alliance project called Green4C. The focus of the project is to promote innovation and entrepreneurship by integrating health and social care with the use of nature and natural resources in both rural and urban areas. Based on the geographical spaces where Green Care initiatives take place (i.e., forests, agricultural land and urban areas), the research identified four thematic sectors that have a specific focus on promoting human health, well-being and social inclusion. These are forest-based care, social agriculture, urban green care and green care tourism (Mammadova et al., 2021). For each of these sectors, a Market Outlook based on data from a selected number of EU countries was undertaken. In the case of social agriculture, these data related to the demand for and supply of such services, the profile of providers and beneficiaries, the key issues relating to funding, policy, certification/quality standards and identifying future trends impacting the sector.

As Briers et al. (2021) note, despite two decades of research, data on many key aspects of social agriculture are not available at the EU level and are fragmented, outdated and inconsistent at various regional and national levels. Consequently, a clear picture of this sector and its market is still difficult to establish, so the numerical data generated below should be regarded as best estimates, as distinct from exact figures.

Therefore, in compiling the Market Outlook, our focus was on those Green4C partner countries with an established tradition of social agriculture where there is access to expertise and data. These include four of the 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. Data sources included relevant academic and grey literature as well as interviews with 9 national social farming experts and a focus group discussion with an additional 6 national experts. The national experts from each of the countries studied included representatives of the main social farming support organisations, academic researchers in the different countries and providers of social farming services. The contacts and networks of the Green4C project team were the main channels through which these experts were recruited. The discussions took place online given the prevailing COVID 19 restrictions in place at the time, but relevant literature suggest that similar themes and quality of data are obtained in both online and in-person fora (Dos Santos et al., 2021).

As Ochieng et al. (2018) noted, while focus group discussions are sometimes seen as synonymous with interviews, the role of the researcher and the relationship with the participants points to a fundamental difference between the two techniques. Interviews demand that the researcher adopts the role of an investigator, while in a focus group discussion, researchers adopt the role of a facilitator moderating a group discussion between participants and not between the researcher and the participants (Smithson, 2000). Members of the Green4C project team undertook the roles of interviewer/facilitator/notetaker for the interviews and the focus group discussion. The interview guide used addressed such topics as the background, context and motivation for the emergence of social agriculture initiatives in different countries, identification of the main participant groups using social agriculture services, issues related to the governance and structure of initiatives in the different national contexts, assessment of the impact of initiatives and key challenges facing the sector. For the focus group, three main issues were discussed

among the participants – the main positive and negative developments that have shaped social agriculture in the recent past in different national contexts; how social agriculture can better address the needs of more diverse participant groups in the future and how social agriculture can better address the needs of farmers in the future. Analysis of the findings of these interviews and the focus group discussion was undertaken to identify key themes, which informed the content of the Market Outlook.

4. Description of the social agriculture market

Demand for and supply of social agriculture services

The number of participants and the number of social farms capture, respectively, the demand for, and supply of, social agriculture services. A range of primary and secondary sources was used to gather these data, ranging from national or regional published statistics to the findings from interviews and the focus group discussion conducted with national experts. Specifically, estimates are provided for

- (i) the number of participants/number of social farms represented by the main national/regional support associations for the most recent year available (typically 2020);
- (ii) the total number of participants/social farms at national/regional level for the most recent year available, including those not represented by the main national/regional association.

Demand

Table 1 describes the demand indicators for all the countries reviewed with the exception of Austria, where sufficient data is unavailable.

Tab 1. Indicators of Demand for Social Agriculture Services. Source: Briers et al., 2021

Country/ Region	Number of participants in social farms represented by main national/regional association(s) in 2020)	Estimated number of participants in social farms at national/regional level in 2020)
Netherlands	25,000	35,000
Ireland	Approx. 8500 participant days	9430 participant days
Italy	1124	15,000
Flanders (Belgium)	2000 (2019)	2050

The Table above shows that, according to data supplied by the Federation for Agriculture and Care in the Netherlands, their members provided social agriculture services to 25,000 people. Since not all social farms are affiliated with this Federation, the national experts estimated the total number of participants who go to a social farm in the Netherlands to be 35,000 (Briers et al., 2021). In Flanders (Belgium), data were provided by the largest social agriculture support association (Steunpunt Grune Zorg), which claims to represent 95% of the social farms in Flanders. For Italy, estimates are complicated by the fact that there is no single overarching national organisation for social agriculture. and social farming interests are represented by two national organisations. National data from the Italian National Institute of Statistics (ISTAT) cannot be used because participants are often included in more than one service and this would lead to double counting of the number of participants (Briers et al., 2021). A recent survey by the *Italian* Council for Agricultural Research and Analysis of the Agricultural Economy of over 400 social agriculture initiatives estimated that services were being provided to approximately 1124 participants (CREA, 2020). However, discussions with national social farming experts estimate the number of participants in labour inclusion initiatives at 15,000 in 2020. In Ireland, Social Farming Ireland, the national social farming support organisation, calculates engagement based on participant days rather than the number of participants. Social Farming Ireland estimates the number of participants days at 8500 (Briers et al., 2021). Participant data from Kerry Social Farming, a regional social agriculture network

organisation which is not affiliated with Social Farming Ireland, are also available only in the format of participant days.

Supply

Table 2 shows the supply side of the social agriculture sector. The first column shows the number of social farms represented by main national or regional associations while the second column provides an estimate of the total number, including those not affiliated with such organisations.

Tab 2. Indicators of Supply of Social Agriculture Services. Briers et al., (2021)

Country/ Region	Number of social farms represented by main national/regional association(s) (2020)	Estimated number of social farms at national/regional level (2020)
Netherlands	850	1250
Flanders (Belgium)	979	1000
Italy	228	3000
Austria	536	699
Ireland	175	195

The table above shows that the majority of social farms are affiliated with the main national or regional social farming organisations in most countries. This is the case, for example, in the Netherlands, Flanders and Ireland. In Italy, there is no specific national organisation to which all social farms belong. Instead, there are social farms that are officially recognised by the regional authorities as social farms based on regional legislation. There are also social farms that are not registered but offer social inclusion activities on their farms and have contracts with local social services (Briers et al., 2021; Borsotto and Giare, 2020). As of 2020, a total of 228 farms were registered as social farms. Of these 228 farms, 80% are private agricultural farms and 14% are social co-operatives. In addition, in Italy, there are enterprises in social agriculture that focus on social and labour inclusion. National experts put the number of these enterprises at approximately 3000 (Briers, et al., 2021). In Austria, the majority (80%) of social farms are educational farms and linked to the Schule am Bauernhof (School on the farm) scheme. The other 20% of social farms are members of the support organisation Green Care Austria. In Ireland, 175 social farms are affiliated with Social Farming Ireland and 20 farms with Kerry Social Farming (Briers et al., 2021).

Providers

Mammadova et al. (2021) summarised the diversity that exists in terms of the provision of social agriculture across Europe as follows: “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 care 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 are managed by a group of social entrepreneurs or in some cases, local community organisations.”

As described in Section 2, above, broadly speaking, the organisation of social agriculture across Europe is underpinned by three main frameworks (Table 3): multifunctional agriculture, public health and social inclusion (Dessein and Bock, 2010; Dessein et al., 2013). Based on insights from the literature, expert interviews and the focus group discussions, Briers et al. (2021) showed how various dimensions of social agriculture align with these frameworks.

However, while these frameworks can be viewed as a basis for the classification of different types of social agriculture practices, in reality, many such practices take a more hybrid form (Briers et al., 2021).

Social agriculture under the framework of multifunctional agriculture takes place mainly on private or family farms. On these farms, both commercial farming and social farming activities take place (Dessein and Bock, 2010). While the social agriculture activities can be an additional source of income for the farmer, as mentioned above, farmers often have a personal motive for establishing the initiative (Roest, 2005; Elings, 2012). Farmers often do not have a professional healthcare background, but in the Netherlands or in Austria, for example, it is common for the farmer's spouse to have some relevant qualification or expertise in healthcare. Farmers are paid in different ways for their social agriculture services – for example, by health care institutions, health insurance companies or by participants' personal budgets (Elings and Hassink, 2006). On these social farms, participants say they appreciate being able to work on an "ordinary" farm where they are part of society and do meaningful activities. Such settings are informal and differ from regular health care settings in this respect (Elings and Hassink, 2008).

Under the social inclusion framework, social agriculture activities are mainly organised by rehabilitation centres, by prisons or social co-operatives in the community and are paid for by social services. In some cases, farmers open up their holdings to allow these activities to take place (Dessein and Bock, 2010). The participants may receive a payment, often paid by social services or the farmer. In some countries, farmers are compensated for offering social services to vulnerable groups.

Tab 3. Overview of the Three Main Social Agriculture Frameworks. Source: Briers et al., (2021)

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 a 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
Supervising 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 for social agriculture initiatives

Under a public health framework, the farmer offers his/her land for the activities but is not actively involved in the therapeutic process (Dessein and Bock, *ibid.*). The agricultural activities and the green space are seen as having therapeutic value for the participants (Briers, et al., 2021). There are health professionals and supervisors in place to interact with the participants and these staff are usually formally employed and receive wages. In this framework, the physical environment can be hospital gardens, institutional farms or private farms. These social agriculture activities are financed by ministries of health, health insurance companies, private health organisations or directly by the participants' personal budgets (Dessein and Bock, 2009; Briers et al., 2021).

Participants and beneficiaries

Across different European social agricultural contexts, a variety of terms is used to describe the people who use social farming services.

Depending on the context, they are called participants, clients, patients, service-users, employees or sometimes assistant farmers. In this article, we mainly use the term participants because we speak about people who are participating in social agriculture activities. If we look at the Dutch social agriculture sector as an example, 20 years ago, the majority of participants comprised those with a learning difficulty. However, more recently, participants include those with physical, sensory or intellectual disabilities, mental health issues, autism, dementia or those experiencing grief following bereavement (Hassink et al., 2020; Gorman and Cacciatore, 2020). They also include vulnerable people such as the homeless, former inmates, people recovering from addiction, youth with behavioral problems, refugees and long-term unemployed people (Briers, et al., 2021).

In addition to the benefits for participants, social agriculture positively impacts on other stakeholders. First, social agriculture provides farmers and their families with additional income. In addition, research has also identified how farmers benefit in terms of increased social contacts, less isolation and a more positive consideration from society (Kinsella et al., 2014). Furthermore, social agriculture initiatives often operate as part of a larger network of activities, and require co-operation with local governments, public health agencies and social care services in order to generate opportunities for employment. In this way, they contribute to rural development, stemming rural decline and outmigration (Mammadova et al., 2021).

Funders

The financing of the social agriculture sector differs in European contexts, although in all countries they are embedded in European policy and funding opportunities. Di Iacovo's (2020) research on social farming financing shows that different welfare models influence the way in which social agriculture is financed across Europe. For example, in the Netherlands the number of social farms increased following innovations in the financial structure of the healthcare sector. From 1995 onwards, clients were given the opportunity to choose their own care or day care services utilising their personal budgets (Elings, 2012; Hassink et al., 2020). In addition, the neo-liberal reforms of the care sector in 2002 gave social farmers the opportunity to receive their own AWBZ accreditation (AWBZ being the general insurance scheme for special medical costs). This meant that social farmers could conclude contracts directly with municipalities for the provision of care. In addition, Hassink et al. (2020) indicate that the revenues from social agriculture have increased in recent years because the sector has become more professional and specialised, with the number of participants per social farm increasing and the range of services provided expanding. Over a period of seven years, annual revenues for the joint regional social agriculture organisations have increased from 11.3 million euros in 2011 to 88.6 million euros in 2018. Given that not all social farms are affiliated with these associations, the estimate for the total income for the Dutch social agriculture sector is estimated to be 250 million euros (Hassink et al., *ibid.*).

In Italy, funding for social agriculture comes mainly from the European Agricultural Fund for Rural Development (EARDF) (Borsotto and Giare, 2020), specifically measure 6.4: "Support for investments in the creation and development of non-agricultural activities" and measure 16.9 "Support for

the diversification of agricultural activities concerning health care, social integration, community-supported agriculture and environmental and food education". Unfortunately, there are currently no data available on the specific amount of funding that is received by social farms from these programmes. Studies suggest that 24% of funding for social agriculture comes from the European Rural Development Program, 13% from regional and provincial funds, 9.7% from foundations, 6% from the European Social Fund and European Regional Development Fund and the remaining percentage from other types of funding such as municipalities (Coldiretti, 2020; Briers, et al., 2021). Unlike the situation in the Netherlands, social agriculture activities are not reimbursed by public health care systems, and it is the participants, rather than the farmers, who are paid for their labour.

In Flanders, a personal budget scheme was introduced in 2017, which allows people with disabilities to make their own choice of care or activities (Briers et al., 2021). This development has opened up new opportunities for smaller sized farms. Most social agriculture activities are financed by the national Rural Development Programme, with farmers receiving 40 euros per day, irrespective of the number of participants taken onto their farms. This subsidy has been provided by the Flemish Department of Agriculture and Fisheries since 2005 and compensates the farmer for offering social farming activities (Dessein et al., 2013). Only farmers who meet criteria such as a certain size of farm, undertaking commercial farming activities and co-operation with a welfare organisation, receive this subsidy. This applies to about two-thirds of Flemish social farms. The remaining third who do not receive any subsidy do not meet the criteria of a professional farm and are often horse riding schools and children's farms.

Social agriculture in Austria is funded by the Austrian Rural Development Programme (RDP) and receives money from national and provincial governments. Social farmers can apply for funding for investments, training and education (Briers et al., 2021). Personal budgeting systems allow participants, including the elderly and people with disabilities, to purchase social farming services (Bock et al., 2016). For the Schule am Bauernhof (educational farm visits for schools), there is a different financing structure. The Ministry of Agriculture, Regions and Tourism pays a fixed amount per class for half a day (EUR 160), for a whole day (EUR 200) with a maximum of EUR 800 for a whole week (Briers et al., *ibid.*).

In Ireland, social agriculture initiatives receive funding from the Rural Innovation and Development Scheme under the Department of Agriculture, Food and Marine. In 2017, 800,000 euros from this scheme went to three social agriculture initiatives and 400,000 euros was allocated to support the National Social Farming network (Social Farming Ireland, 2019). The EU INTERREG Programme provided 700,000 euros to fund the establishment of a support organisation for the development of social agriculture in Ireland – called Social Farming Ireland (SFI). Via this organisation, farmers are paid a daily rate for providing social farming services. The funding comes from a range of sources including health and social care providers, various government funding programmes such as Healthy Ireland and SICAP (Social Inclusion and Community Activation Programme). Social Farming Ireland also acts as a mediator between commissioners of services and social farmers in activating and supporting placements (Social Farming Ireland, *ibid.*)

Quality assurance and certification

In 2000, the National Support Centre for social agriculture in the Netherlands set up a quality system to ensure the quality of the care services offered by social farmers and this system has been refined several times. In the latest revision, emphasis was placed on determining participants' satisfaction with their assigned roles and tasks on the farm. If initiatives meet the quality requirements, the farm receives the quality mark 'Kwaliteit laat je zien' (translated as: "Quality is something you show"). The quality mark exists since 2002 and ensures that farmers comply with the required laws and regulations (Federatie Landbouw en Zorg, 2021). In order to maintain the quality mark, an audit is carried out by independent advisors of the Federation for Agriculture and Care every three years.

In Flanders, there is no quality system for social farms, but quality is guaranteed by co-operation between social farmers and a care or welfare organisation. The organisation has to meet specific guidelines and standards and based on these, choose which social farm to co-operate with. The responsibility for monitoring the client's satisfaction also lies entirely with the welfare organisation (Briers et al., 2021).

In Italy, there is no national-level quality label for social agriculture. However, nine regions have taken the initiative to develop regional laws and regulation that allow farms to apply to be officially registered as a social farm. Once they are registered, social farms are more visible to public organisations and consumers and receive preferential treatment when accessing local markets or school and hospital canteens. As an example, the region of Veneto has 35 registered social farms. These farms have to meet different criteria such as the presence of a farmer or social entrepreneur, ethical responsibility, environmental sustainability and are required to undergo regular training (Briers et al., 2021).

In Ireland, the Social Farming Ireland (SFI) organisation has an important role in monitoring the quality of social farms. Members of SFI have to go through a certain selection process during which they receive a two-day training and mentoring programme. Participants who engage in social agriculture activities through SFI make an Individual Support Plan (ISP) and are monitored (Social Farming Ireland, 2019).

In Austria, social farms offering care and integration services can obtain certification through the "Green Care Austria-Wo Menschen aufbluhen" system. There are two types of certification. The first is an internal certificate issued by Green Care Austria and the second is an external certificate issued by an independent certification body (SystemCERT). Only social farms that offer certain types of care are eligible for certification. Social farms that have received internal certification must be reviewed three years later by the external certification body. The Rural Development Programme covers 40% of the external certification costs (Green Care Austria, 2021). As outlined earlier, the majority of social farms in Austria offer education services to school children and are affiliated with the Schule am Bauernhof system. To become a member of this association, candidates must successfully complete a certification course. This training is given by the Rural Training Institute (Landlichen Fortbildungsinstitutes) and lasts ten days during which farmers learn organisational, personal and technical skills to accommodate schools on their farms (Schule am Bauernhof, 2021).

Reflection and Synthesis

From the above discussion, it is clear that the social agriculture landscape in the selected European countries is very diverse. Nevertheless, Briers et al. (2021) identified a number of key characteristics by which different countries across Europe can be compared. These three key dimensions are the organisational structure, the funding and financial environment and the framework which underpins their organisation and operation.

As mentioned above, the social agriculture sector in Italy is underpinned by a framework of social inclusion (Dessein and Bock, 2010; Di Iacovo and O'Connor, 2009). In the social agriculture sectors in Flanders, Ireland and Austria, a multifunctional agriculture framework is dominant (Dessein et al., 2013). In the Netherlands, the social agriculture sector shows some characteristics of the public health framework but the multifunctional agriculture framework is still dominant (Briers et al., 2021). The majority of Dutch social farms are privately-owned but many of them get income solely from the health care sector. There are also examples of institutional social farms managed and owned by health care institutions. In Ireland, we see a shift from social agriculture activities that were mainly organised by large health/social care institutions to social agriculture that is practiced on privately-owned family farms.

Overall, the analysis below served to illustrate how the different framings map to the different ways in which social agriculture is structured and organised in different country contexts. However, in reality social agriculture initiatives often have characteristics of more than one framework (Briers, et al., 2021).

Tab 4. Overview of Key Dimensions of Social Agriculture. Source: Briers et al., 2021

Country/ Region	Most common innovator or promoter	Financing model	Main discourse type
Netherlands	Private (family) farms	There are 2 main financing streams. Municipalities pay for youth care, and the less intensive forms of support for adults via the general health care budget (WMO). The more intensive forms of support for adults are reimbursed at national level under the Long-Term Care Act (WLZ).	Multifunctional agriculture with characteristics of the Public health discourse
Flanders (Belgium)	Private (family) farms	Professional Flemish farmers who provide social agriculture services and collaborate with a welfare organisation receive a subsidy of max. €40/day irrespective of the number of participants from the Flemish Department of Agriculture and Fisheries.	Multifunctional agriculture
Italy	Third sector: mainly co-operatives Private (family) farms	The health service pays the farm if participants reside on the farm, otherwise the state pays people with a disability to work on a farm. RDP funding supports the development of new public-private partnerships that can animate, develop and implement new practices on the farm, as well as infrastructure requirements for social agriculture. It does not pay the farm or the participant.	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 agriculture activities, which are commissioned by social/healthcare service providers.	Many farmers get paid by the commissioning organisations.	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 & social insurance which they can use to pay for the social agriculture activities.	Multifunctional agriculture

5. The future of social agriculture in Europe

The discussion below draws principally from the focus group convened for the purpose of informing the Market Outlook with respect to the future direction of agriculture. The key themes identified in the course of this exercise were as follows:

Broadening of target groups and activities will be associated with more diverse forms of social agriculture activities. Historically, social agriculture focused on activities for people with disabilities or mental health issues. More recently, there is increased demand for social agriculture activities from other groups such as the elderly, school drop-outs, cancer patients, refugees, asylum seekers and school children. In the discussion, focus group participants from the Netherlands, Italy and Ireland mentioned the importance of social farms in the provision of education. In the Netherlands, for example, discussants noted that there are already more than 50 so-called educational “care farms” where primary and secondary school children are taught. These educational farms have their own network and are not affiliated with the National Federation of Agriculture and Care. The diversity of activities also means a changing demand for different types of social entrepreneurs to grasp the opportunity for innovation and to create new business models. If, for example, the number of social farms providing educational services increases in the future, more entrepreneurs with educational skills will be needed. On the other hand, discussants stressed that the unique role of, and contact with, ordinary farmers and their families should not be lost in undertaking social agriculture activities in these contexts. Meeting existing demand, as well as future planning, were also impacted by the unfolding COVID situation. This resulted in intermittent and unpredictable interruptions to the supply of on-farm social agriculture activities, alongside consequent uncertainty and disruption faced by participants.

A second issue that was discussed was **the need to provide more specific and tailored training, peer-learning and knowledge-sharing opportunities to support a more diverse social agriculture sector.** Diversification, in terms of participant profiles and activities provided, will also allow for other sources of funding to be accessed. Discussants noted how, in Flanders, historically, it was difficult to fund social agriculture activities for participants with intensive care needs. However, with the arrival of personal budgets, participants can make their own choice to go to a social farm. It was also noted that we are likely also to see this development in Ireland. Notwithstanding this development, however, national and regional governments will remain an important stakeholder in the financing of the social agriculture sector.

In addition, discussants noted that **social agriculture can play an important role in making green spaces more accessible not only to people with disabilities but to the wider public.** Because of the COVID pandemic, more attention of late has been paid to the importance of green surroundings for individual wellbeing and the community in general. Due to increased urbanisation, fewer people come into contact with nature and farm life. Therefore, the connection between social agriculture and urban agriculture initiatives will become even more important. In this respect, the increased attention on the green environment will contribute to the re-enrichment of rural areas and will improve the image of farmers.

While the visibility of social agriculture has increased in recent years, the focus group discussants **stressed the importance of improving communications around what social agriculture has to offer.** Communication must make clear that social agriculture is a win-win situation. Social agriculture is not only beneficial for the participants but can also be economically beneficial for farmers and rural areas. It can also positively change the negative image of agriculture that prevails in some societies. Social farms can play a role in communicating the role of farming in food production and environmental protection. Some discussants identified changing societal trends whereby young people are expressing a desire to get back to nature and farming. For countries where the social agriculture sector is not yet well-established, it would be interesting to tap into these trends. In this regard, discussants noted an important role for national social farming organisations. It was also agreed that research on the effects of engaging in social farming activities, dissemination of best practices and developing the evidence base are all important elements of this communications process.

Notwithstanding the growing recognition of the important contribution of social agriculture to society, discussants agreed that the current funding mechanisms in different national contexts are insufficient to sustainably support the sector. At present, in many countries, funding for the sector is often insecure and difficult to obtain. For instance, it was pointed out that in the Netherlands, where the social agriculture sector is well established, changes in the financing structure of the health care sector and the diversity of target groups often make it unnecessarily complicated for social farmers to receive compensation. The discussants stressed that there is **a need for targeted and secure funding**.

Furthermore, they pointed out that social agriculture can not only help the transition from a healthcare-centered model to a socially embedded model for care and inclusion, but it can also help to stop the loss of European small- to medium-sized farms. Social agriculture activities are often a welcome diversification strategy for small- to medium-sized farms. In communicating and raising awareness of the added value of social farms, solid research with examples of best practices and a stronger evidence base showing the effects of social farms is of great importance.

6. Concluding remarks

As stated at the outset of this paper, our main purpose was to provide an overview and outlook for the market for social agriculture services in a selected number of European countries. However, given the diversity which exists within social agriculture across different national and regional contexts in Europe, this overview is not necessarily representative of the European landscape overall. At the same time, the countries under review in this paper capture a wide variety of experiences in terms of stage of development, organisational structure, the profile of providers and participants, the types of services provided, funding mechanisms and quality standards, *inter alia*. Another issue of concern is the lack of published data at European, national or regional levels on key indicators related to social agriculture. Consequently, it was necessary to draw on a wide variety of published and unpublished sources, augmented by expert opinion, in compiling data for this Market Outlook. Furthermore, much of this work took place against the backdrop of the COVID 19 pandemic, which resulted in considerable disruption, unpredictability and uncertainty in the provision and uptake of social farming services, and possibly coloured the opinions expressed by experts/practitioners in relation to the current operation and future direction of the sector. It is important that these caveats are borne in mind when reflecting on the content of this paper.

In summary, we can say that while social agriculture provides clear opportunities for farmers, it also provides an opportunity for welfare policies to address diverse social needs. For a whole range of merging global trends such as post-COVID uncertainties about economic security, biodiversity losses, lifestyle issues connected to mental health and a host of non-communicable diseases, social agriculture can contribute to addressing these issues. While social agriculture differs greatly across different national contexts, these diverse experiences represent a wealth of ideas, experiences and opportunities for learning. What strengthens the practice of social agriculture is the presence of co-operation, partnerships and collaboration among public and private entities, communities and citizens. However, this Market Outlook also shows that there are many challenges ahead. As social agriculture is such a cross-sectoral issue, it has to operate within with the norms and regulations of the many different sectors associated with it. 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 for whom 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 and be recognised and supported in public discourse, policy and practice for their important and meaningful work.

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