



White Paper & key results on the needs analysis

Developed by

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1. Introduction

The OFAFFU needs analysis was one of the central work packages of the project and is intended to provide insight into the barriers and inhibition thresholds for certified organic farming in practice. The following document begins with a general insight into the project and presents the project objectives and results. This is followed by relevant information on how the data for the needs analysis was collected and the extent and duration of data generation. Based on this, the core results are presented, and important findings are shown. These form the basis for ten recommendations to reduce barriers and inhibitions to certified organic farming and to promote organic farming methods. The annex contains detailed information on the demographic profile of the respondents from the quantitative data collection and a corresponding country profile of the respective results of the OFAFFU project countries.

2. About OFAFFU

The European Commission has set a target of at least 25% of Europe's agricultural land being managed organically by 2030. Currently, we are only at 8.5% across Europe (Organic Action Plan, European Commission. 2021).

With **Organic Farming for Future** we want to contribute to achieve this goal - from practice for practice. **OFAFFU** combines two essential areas that will transform Europe on its way to sustainability: Education and Agriculture.

Particularly considering the European Reference Framework for Sustainability - GreenComp - we develop innovative educational concepts in vocational education and training for future. Here, green skills meet entrepreneurial thinking, so that the profession of farmer can once again become a viable profession with quality of life.

Our project objectives

- Identify the obstacles that prevent farmers from converting to organic farming.
- Raise awareness of environmental and climate issues.
- Develop green skills among farmers
- Increase motivation for sustainable management
- Capacity building & knowledge transfer through exchange of best practices in organic farming, considering innovative and resource-efficient farming methods.
- Creating a green alliance of farmers & relevant stakeholders
- Implementation of ecological transformation factors

- More sustainable food system by increasing the number of organic farmers and improving their agricultural and economic skills.

Our project results

- White paper based on an extensive needs assessment, presenting barriers and obstacles to organic farming
- Development of a curriculum
- Preparation of training materials and a training manual
- Delivery of a training in Caudiel, Spain
- Implementation of Impact Hubs in Austria and Spain

OFAFFU is a Small-Scale-Project co-financed by the European Union within the framework of Erasmus+. The project period is from 01.01.2023 - 30.06.2024.

3. Key data of the needs analysis

The approach of the needs analysis to determine the barriers and inhibition thresholds for organically certified agriculture was to choose a multidimensional approach in the methodology. This was divided into conducting two focus groups in each of the project countries to collect qualitative data and conducting an online survey to generate quantitative data. In terms of content, both research methods focused on structural and cultural barriers, the lack of farmers' perspectives, economic factors, the support system in the agricultural sector and the lack of educational content in vocational education and training in relation to organic farming.

Focus groups

A semi-guided questionnaire was developed as part of the focus groups to enable a cross-national comparison. This was divided into four sections: Barriers and inhibition thresholds, need for action, future scenarios and concrete action measures, which were linked to the following key questions:

1. What are the current barriers and inhibitors to certified organic agriculture?
2. What is currently the greatest need for action?
3. What would agriculture look like in 10 years' time if the goals of the Organic Action Plan were achieved, and the majority of agricultural land was farmed organically?
4. What concrete changes would we have to make now in order to realize this future scenario? At the individual, municipal/regional, national and European level?

At OFAFFU, we deliberately opted for an inclusive approach and therefore invited people to participate in the focus groups who were either decision-makers in the field of vocational education and training, the labor market and developments in job profiles in the agricultural sector, the funding landscape, the legal framework and political level, and farmers themselves to include their perspective in the qualitative needs assessment, as well as other relevant stakeholders to cover as many perspectives as possible.

The first focus group in Austria took place on May 8, 2023 with 13 people in Innsbruck with representatives from the Tyrolean Chamber of Agriculture, the Rural Training Institute (LFI), regional development, research institutions, agricultural networks (Urkorn Oberland, Arche Noah), BIO Austria Tirol and farmers from the region. The second focus group in Austria took place on 30.05.2023 with 7 people in digital form via MS Teams with representatives from the Federal Ministry of Agriculture and Forestry, University of Natural Resources and Life Sciences (BOKU), the Rural Training Institute and farmers.

In Spain, the first focus group took place on 23.06.2023 with 9 people in Caudiel with representatives from various agricultural networks, farmers and the agroecological education sector. The second focus group followed on 21.07.2023 with 4 people in Caudiel with representatives from agricultural cooperatives (agricultural cooperative in Viver) and producers of agricultural products.

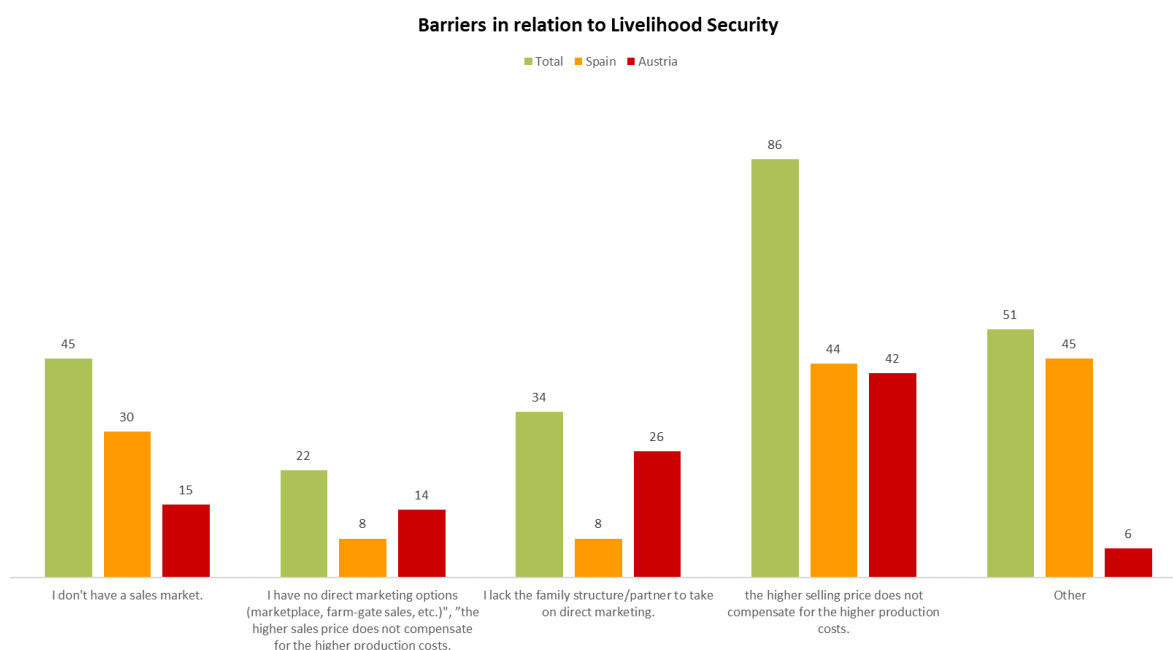
Another key component of the needs assessment was the implementation of a survey aimed directly at the project's primary target group, the farmers. A questionnaire was created online for this purpose, which was available as a link and a QR code. The survey comprised a total of 15 questions, eight of which related to the content-related barriers and inhibition thresholds of organically certified agriculture and seven questions were used to survey the demographic profile. The questions were designed as multiple choice in the Likert Scale approach with partial multiple answers and were made available in Spanish and German. In Austria, the survey was sent to all agricultural colleges, the Rural Training Institute, agricultural networks and associations, young farmers and the Tyrolean Womens Farmers' Organization and shared on social media. In Spain, the survey was shared in the farmers' association, in agricultural networks, directly at local farmers' markets and on social media. As the response rate was low despite the wide distribution, the survey period was extended and ran from June 2023 to May 2024. A total of 104 people took part in Spain and 73 in Austria, making a total of 177 participants.

4. Key results of the needs analysis

The following core results are based on a summary of the focus groups conducted in Austria and Spain with a total of 33 people and the results of the online survey with 177 respondents. In total, qualitative and quantitative data was collected from 210 people. For a better overview, the results are divided into structural and cultural barriers and inhibition thresholds and examined from the perspective of the farmers themselves and at system level.

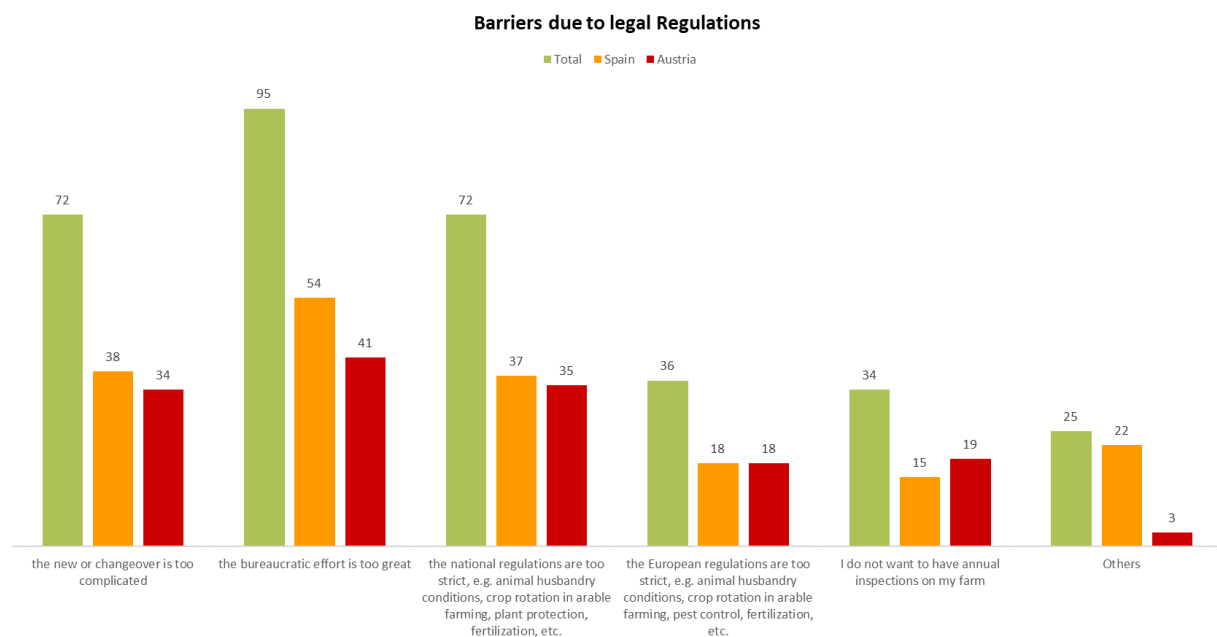
Structural barriers from the farmer's perspective

A major barrier for farmers is securing their livelihoods, which goes hand in hand with a lack of economic profitability. This tends to affect farms in the agricultural sector, whereby it should be emphasized that small-scale farms are particularly affected compared to large farms. This is exacerbated by several factors and certain legal requirements, such as documentation obligations, require additional personnel resources, which are not available to a large extent on small farms to cover the administrative workload. This has a negative impact on their economy of scale. In addition, organic farming incurs higher labor and personnel costs compared to conventional farming, which must be reflected in the price or sales market to ensure stable economic profitability to secure the livelihood of farmers. This imbalance between production and yield was also cited in the survey as a key barrier to switching to organic farming:



A total of 86 respondents stated that the higher price would not cover the production costs incurred, which is almost half of the total number of respondents.

An additional complicating factor is the increase in bureaucratic and administrative work due to legal regulations, which is associated with an increased amount of time. In the context of documentation requirements, diversity has a negative impact on a small-scale farm, because each area in turn entails its own requirements, which multiplies the bureaucratic work exponentially. Examples of this were the purchase of animals and pasture documentation.



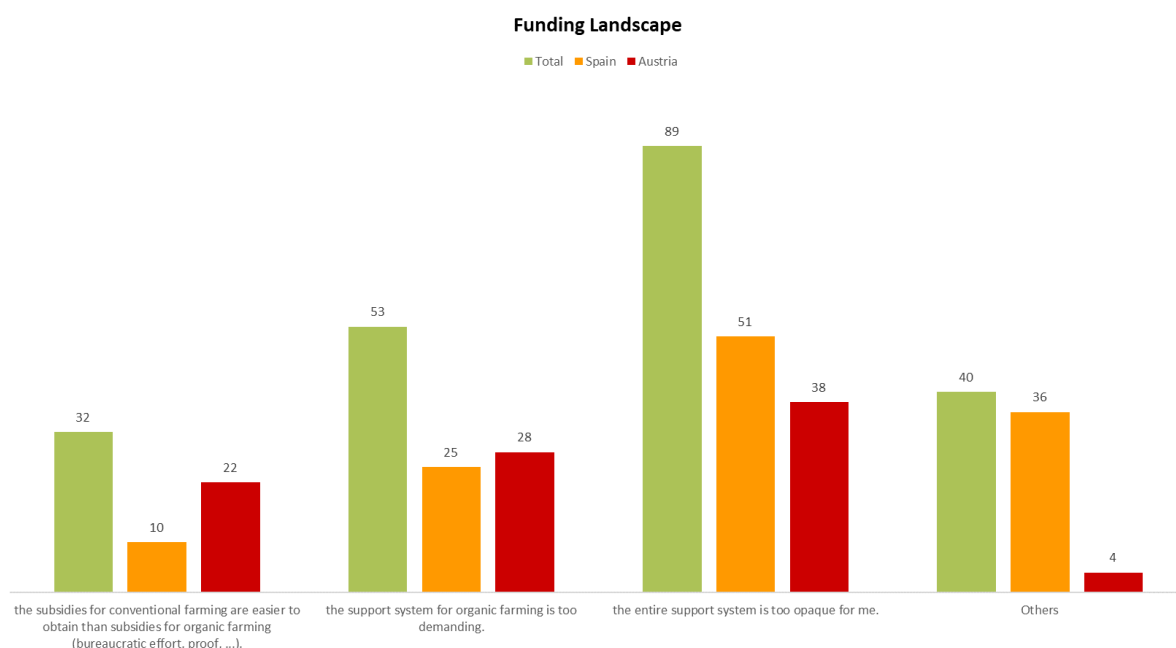
As the chart shows, 95 respondents stated that the bureaucratic burden for certified organic farming is too much. This corresponds to 56 percent of respondents. In addition, 72 people stated that switching to organic certified agriculture is too complicated and that the national regulations are too strict.

The needs assessment also revealed that certain products from agricultural production, such as washing sponges like those produced in Spain, are not legally eligible for organic certification. The restrictions on the use of copper in organic plant protection were also cited as an additional barrier to organically certified agriculture in the legal context.

Although the support and funding system in the agricultural sector was originally intended to provide support for farms, it has become a further barrier and inhibition threshold for certified organic farming due to the system. From the farmers' perspective, the IT system to be used is not perceived as user-friendly. As an example, the funding mask for multiple applications was mentioned, which means

that electronic applications themselves have become a barrier. This factor is reinforced by the perception that the entire funding structure has become complex and that it is increasingly difficult for those affected to maintain an overview and a clear perspective.

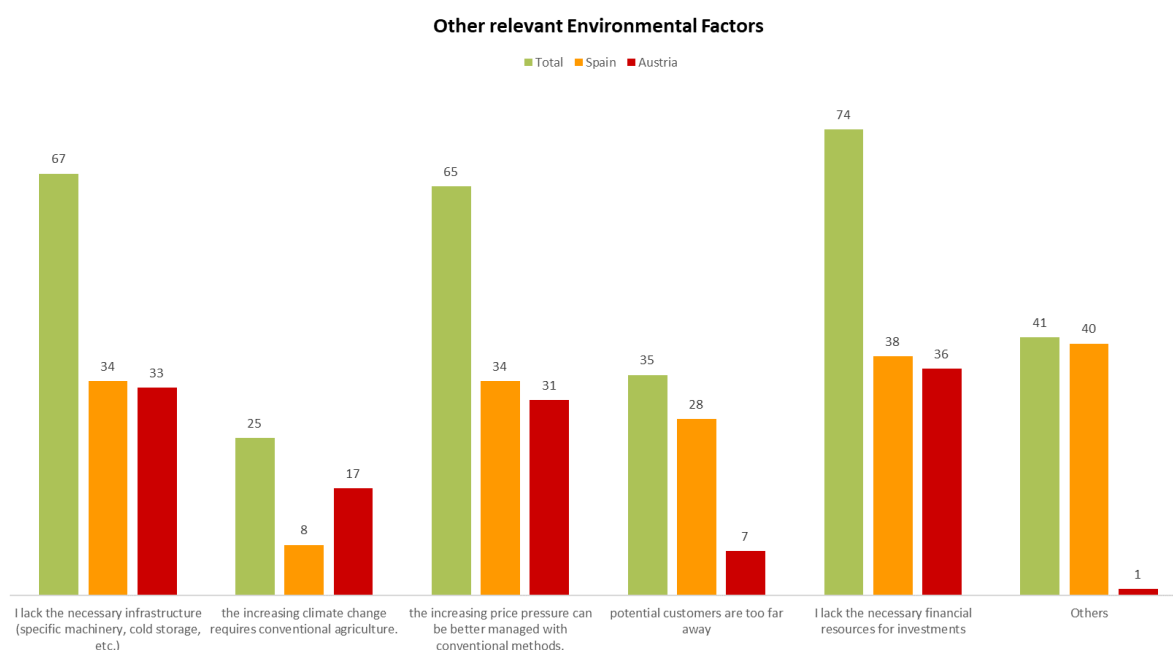
As the following chart shows, 89 respondents to the survey stated that the entire funding system is too opaque for them, which corresponds to half of the total number of participants.



Regarding knowledge and application skills in the context of certified organic farming, the lack of educational content in the context of vocational education and training, which is discussed in more detail in the section 'Barriers at system level', should be mentioned. On the other hand, there is also the lack of digital skills among farmers, including a lack of knowledge for marketing in the digital sphere, such as on social media. The digital transformation is affecting all professional groups and areas and, with increasing digitalization, farmers are also required to ensure that they remain up to date. This ranges from the electronic application process mentioned above to the use of new technological possibilities for the use of agricultural labor or for monitoring plant growth or health. It became particularly clear in the focus groups that the risk of a so-called 'digital gap' is increasing and that certain processes in the agricultural sector are currently taking place in parallel, i.e. both analog and digital, which increases the additional burden on farmers in

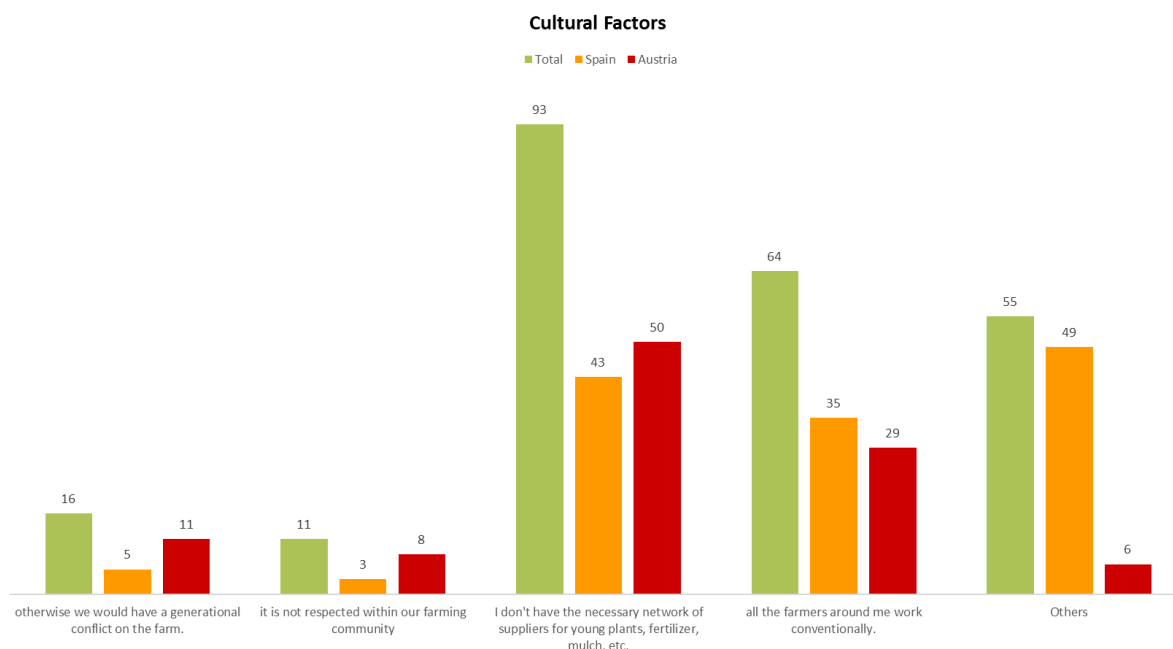
terms of implementation and processing.

Regarding structural barriers, it became obvious from both the focus groups and the survey results that the relevant environments in which farms are embedded are key factors influencing the opportunities for organic farming. This can range from suppliers and the necessary infrastructure to the accessibility of the required customer groups. In addition, each country has its own special aspects in the agricultural sector, which we have to take into consideration. In Spain, for example, it is apparent that fields are often geographically far apart in small-scale agriculture. This decentralization means that larger distances must be covered, which often makes it difficult to work efficiently. Another specific feature in Spain is that the irrigation system works with so-called Waal waterways. This supports an ecological way of farming, but resources are limited and a connection to the general irrigation system prevents the possibility of working under certified organic standards for citrus fruits, for example, as it is enriched with artificial fertilizers. Regarding infrastructure, a general barrier to organically certified agriculture is the lack of infrastructure in rural areas. An example of this is the increasingly difficult access to manure or fertilizer from extensive livestock farming, as small to medium-sized sheep and goat farmers, who were responsible for the supply, have ceased operations in the last two to three decades. In Austria, the fact that efforts in recent years to market 'regionality' as a key quality feature have reduced the importance of certified organic food was also cited as an obstacle. It was also pointed out that with concepts such as solidarity agriculture (SOLAWI), buyers can check the quality standards themselves and therefore certification is not needed.



Cultural barriers from the farmer's perspective

The farming community plays a particularly important role in small-scale farms, as these are family-based and social status is measured differently in rural areas than in urban areas. It was therefore important in the needs assessment to address these aspects as potential barriers and inhibition thresholds for certified organic farming. However, as can be seen from the graph below, generational issues and reputation within the farming community do not play a decisive role when it comes to the type of farming method. Even if the interviewees stated that farmers in the area work conventionally, no conclusions can be drawn as to whether this is seen as a barrier. As already mentioned in the section above, it is rather the necessary network of suppliers that makes certified organic farming more difficult.



Summary of barriers and inhibitions at an individual level

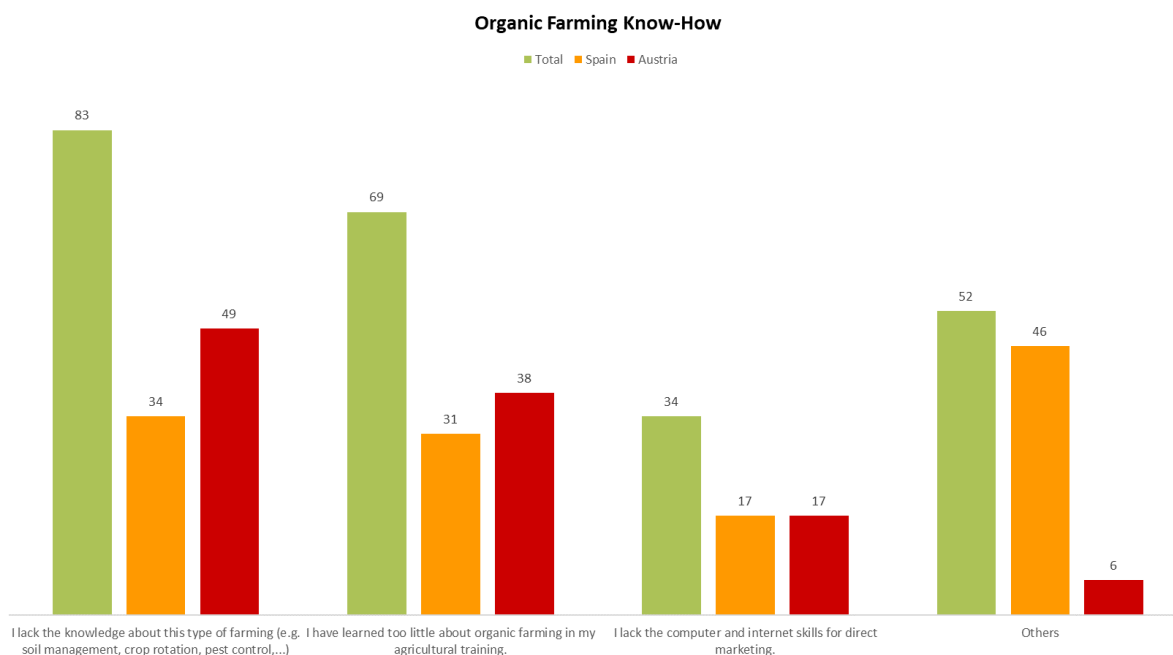
A significant challenge for farmers is securing their livelihoods, closely tied to economic profitability. Small-scale farms are particularly affected compared to larger ones. Factors such as legal requirements and documentation obligations demand additional personnel, which small farms often lack, leading to inefficiencies. Organic farming also incurs higher labor and personnel costs than conventional farming, which affects pricing and market sales necessary for economic stability. This imbalance between production and yield is a major barrier to switching to organic farming. Regarding knowledge and application skills in certified organic farming,

there is a notable lack of educational content within vocational education and training, as detailed in the section 'Barriers at system level'. Additionally, farmers often lack digital skills, including knowledge of digital marketing, such as on social media. The digital transformation impacts all professions, and farmers must stay current with advancements. This includes using new technologies for tasks like electronic applications and monitoring plant growth or health.

Summary of barriers and inhibitions at a system level

On the one hand, regulations, mandatory provisions and requirements serve to guarantee the quality of food products and, on the other hand, have led to them becoming barriers to certified organic farming. If the requirements to be fulfilled are no longer proportionate to the practice or if they entail an overriding administrative burden, farmers will weigh up carefully whether certification is worthwhile in the truest sense of the word. This stalemate is also reflected in the subsidy system. What is basically intended as support has become a barrier. Starting with electronic applications through to documentation in user-unfriendly IT systems.

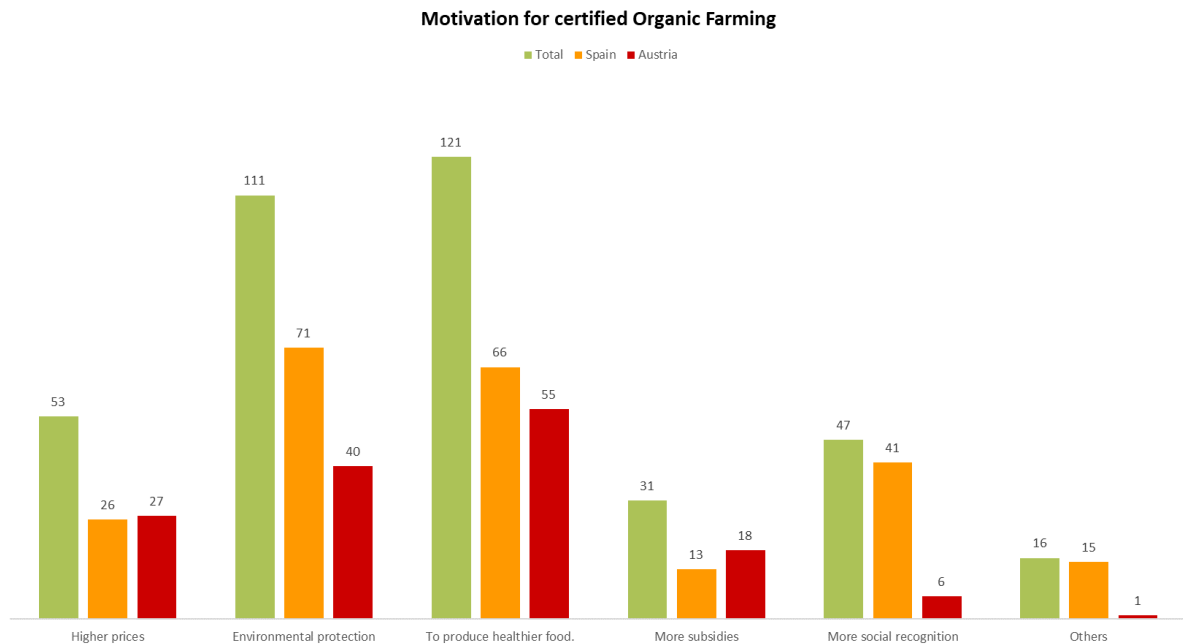
Another barrier to organic farming is the lack of knowledge about it. Almost 40% of respondents stated that they had learned too little about organic farming in their training courses. This indicates that education, training and further training courses offered by agricultural education providers may also need to be revised and a conscious focus on organic farming must be placed in the teaching of educational content to up- and reskill learners.



5. Recommendations

The following recommendations are based on the analysis of the results, which was carried out using the data from the survey and the focus groups. A total of 210 people were involved in the needs assessment, which enabled OFAFFU to examine representative results. Despite structural and cultural barriers at individual and system level, there is significant motivation for certified organic farming among farmers. The reasons for this are primarily to be found in the production of healthier food and environmental protection. Almost 70 % of respondents stated that healthier food is a motivating factor and over 60 % of respondents see environmental protection as a motivation for organically certified farming, with

participants from Spain showing more motivation than those in Austria.



From this we can conclude that, despite the many barriers and inhibitions, there is an incentive to adopt certified organic farming. In the following, we have drawn up the following recommendations from the three core areas of education, legal provisions and the funding system, which are necessary to reduce barriers and inhibitions and increase the proportion of certified organic farming.

Education

- 1) Integration of relevant educational content on organic farming in all agricultural education, further education and training courses
- 2) Revise curricula to ensure the transfer of ecological knowledge
- 3) Knowledge transfer via a wide range of educational measures in school and adult education, e.g. a separate organic subject in secondary schools or that you can graduate in organic farming.
- 4) Raising awareness among the population to counteract myths about food production and at the same time promote value creation through appreciation of food.
- 5) Promote more educational initiatives, especially in schools
- 6) Digital education for farmers

Legal provisions

- 7) Develop innovative approaches to administrative and bureaucratic tasks.
For example, a mobile abattoir means that not every small livestock farm has to make large investments and deal with bureaucratic tasks as would otherwise be necessary when building an abattoir on their own farm.
- 8) Adaptation of the bureaucratic burden to the size of the farm.
- 9) Making regulations more flexible or easier for small food producers

Funding system

- 10) Increase in personnel resources of agricultural system partners and contact institutions for support and advice in the electronic submission of funding applications

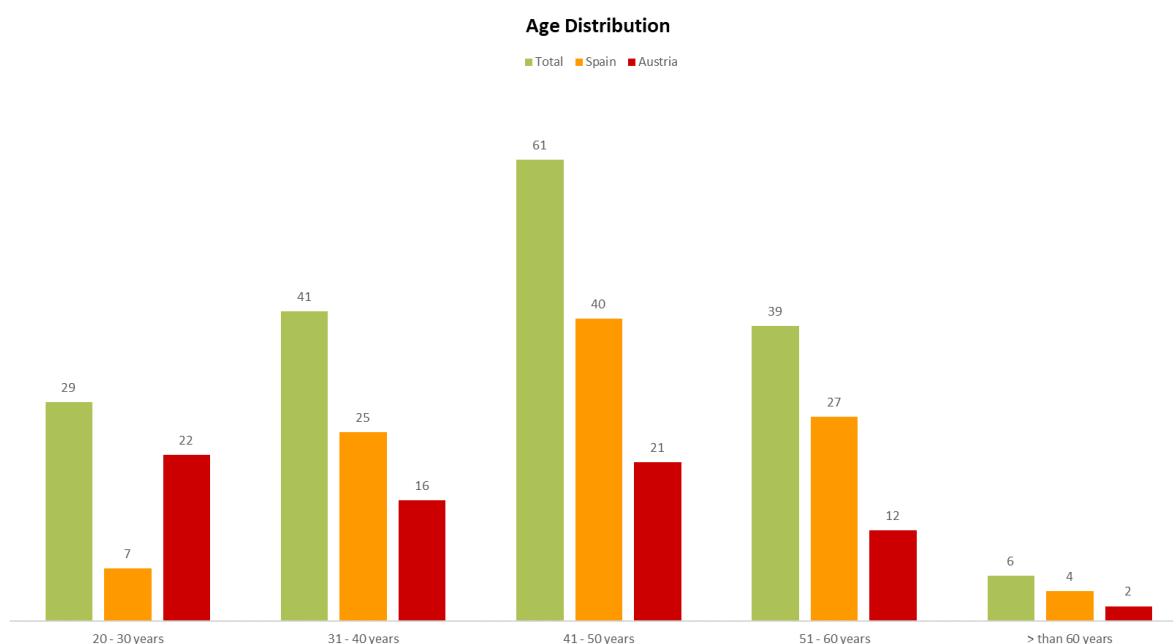
We also see a great need to promote the circular economy in the agricultural sector in order to secure production and production within organic farming. This includes areas such as the supply of fertilizers, but also in the sales channels for agricultural products. In addition, the promotion of hybrid agriculture is also seen as a lever for organically certified agriculture. Aligning conventional and organic farming will enable the rifts between the two sectors to be increasingly soothed and the focus to be placed back on sustainable agriculture.

6. Annex

Demographic Profile of the participants from the survey

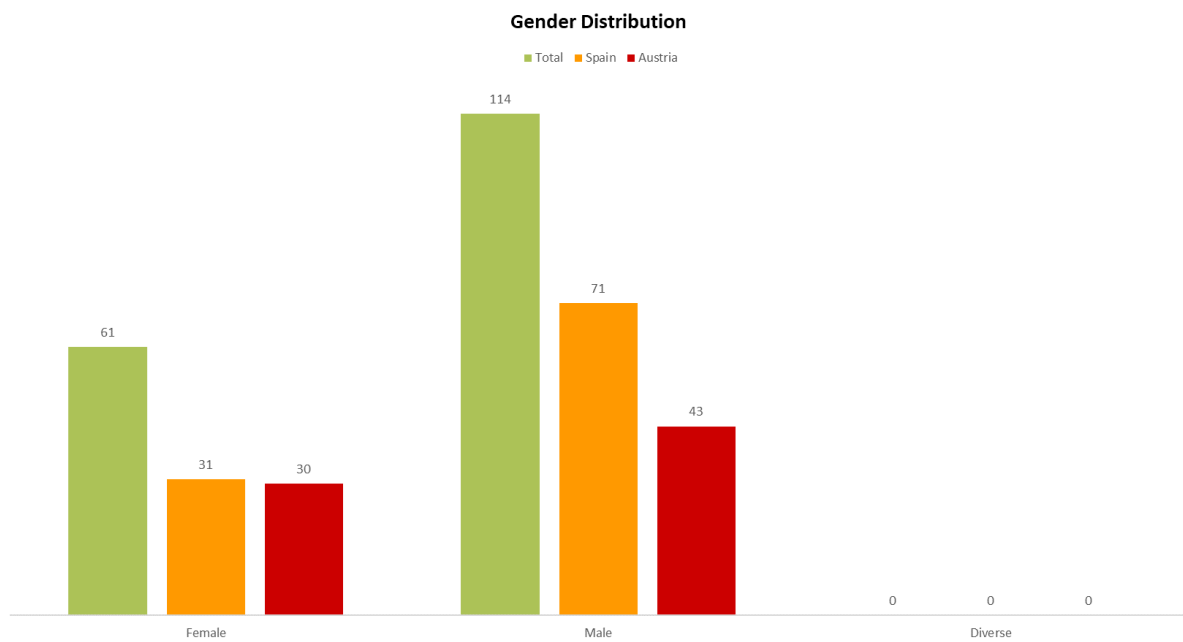
Age Distribution

The survey included participants of various age groups. A significant portion of the respondents were between the ages of 30 and 50. Notably, one out of the 177 participants did not mention their age.



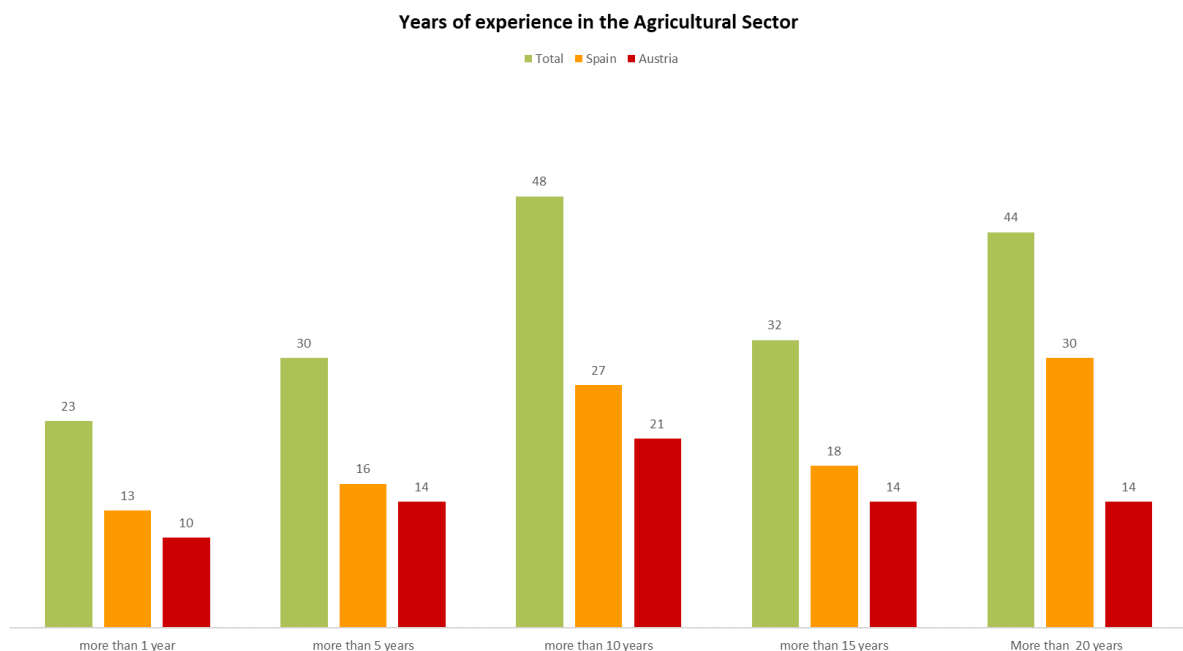
Gender distribution

The gender distribution was nearly equal between men and women, with only a slight male predominance. However, two participants did not specify their gender.



Years of experience in the Agricultural Sector

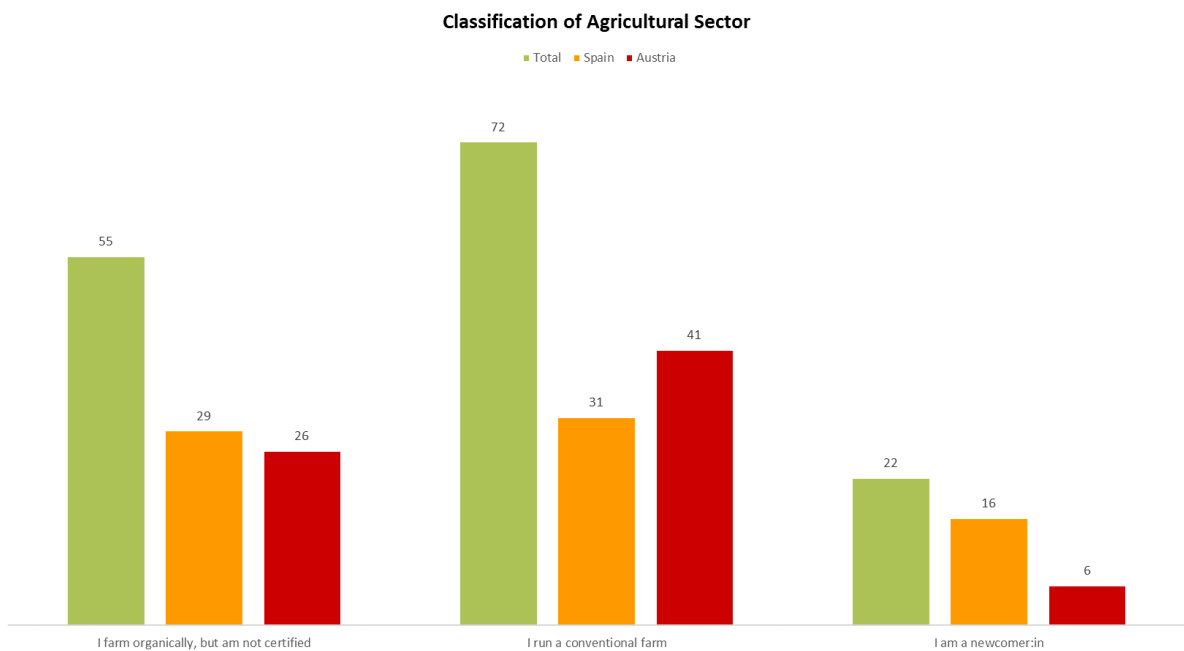
Participants were asked about their years of experience in the agricultural sector. The responses were diverse, with 23 participants having worked for more than 1 year, 30 participants for more than 5 years, 48 participants for more than 10 years, 32 participants for more than 15 years, and 44 participants for over 20 years.



Classification of Agricultural Sector

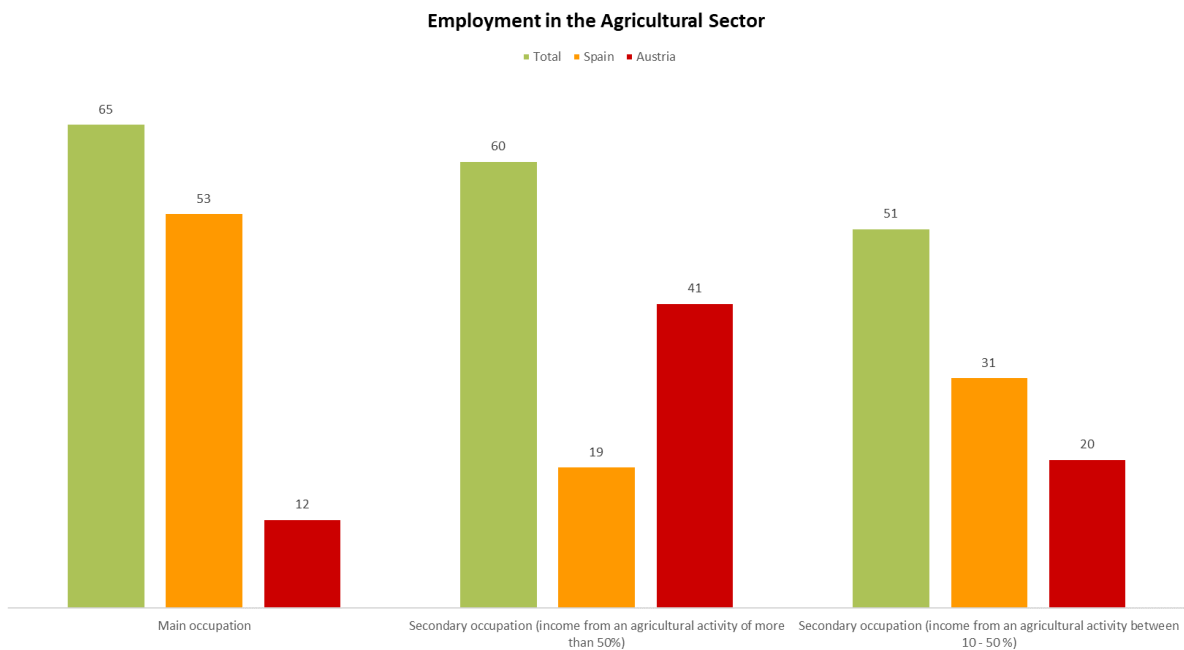
When asked about their classification within the agricultural sector, 55 participants indicated that they run an organic farm but are not certified, 72 participants stated that they run a

conventional farm, and 22 participants identified themselves as newcomers. However, 28 participants did not provide an answer to this question.



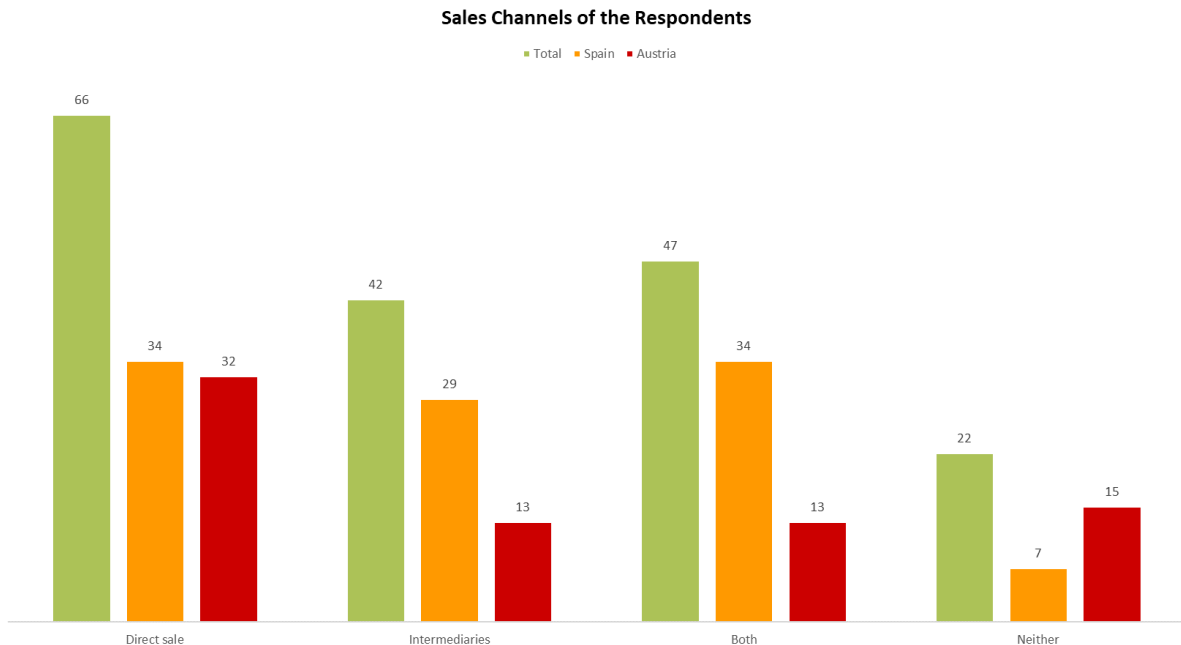
Employment

65 participants reported that agriculture is their primary occupation. Another 60 participants stated that agriculture is a secondary occupation, with more than 50% of their income derived from agricultural activities. Additionally, 51 participants indicated that agriculture is a supplementary occupation, contributing between 10% to 50% of their income. One participant did not disclose their employment status in the agricultural sector.



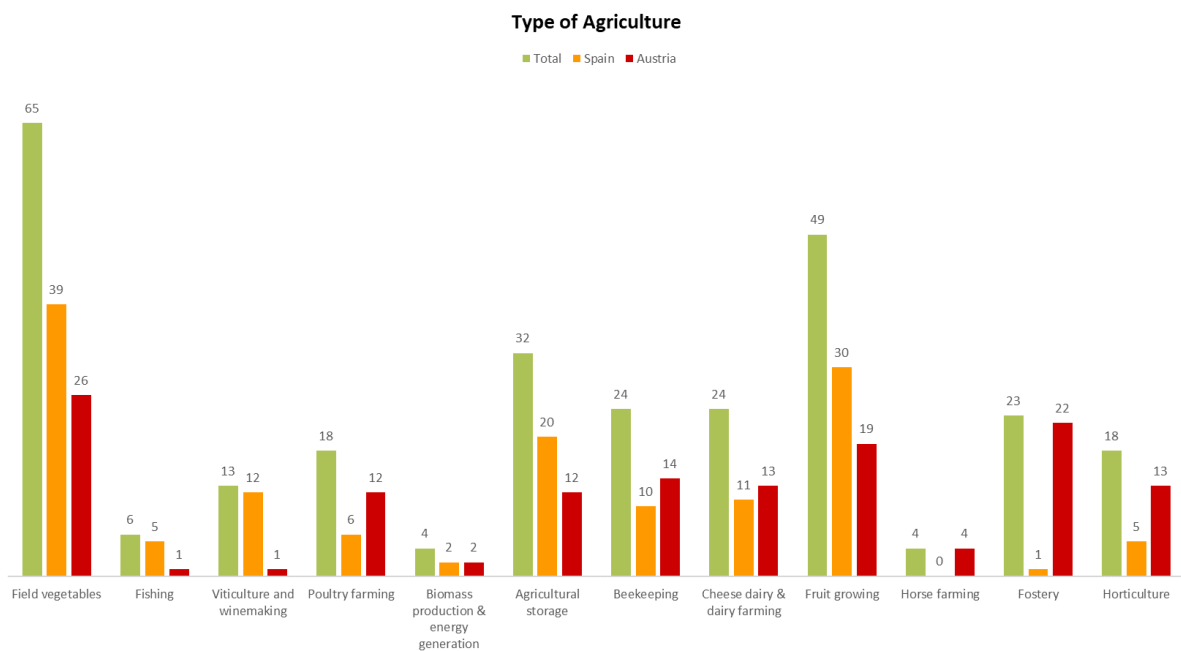
Sales Channels

66 participants chose the method of a direct sale, 42 participants rely on intermediaries and 47 participants utilize both direct and intermediaries for sales. Additionally, 47 participants do not use either method.



Type of Agriculture

The participants were asked about the type of agriculture they engage in and could select multiple options from a provided list. The following chart provides an overview of the participants' responses.

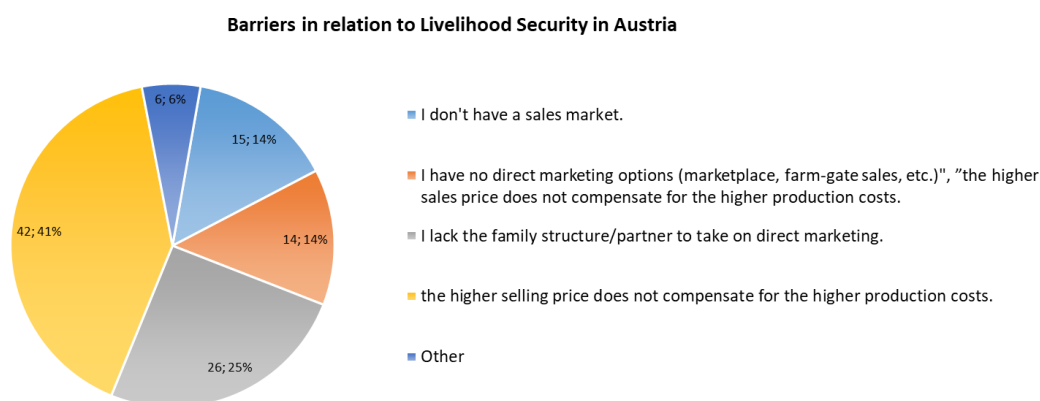


Country profile of the results from the needs analysis in Austria

The survey identified several barriers faced by farmers in Austria when considering a transition to organic farming.

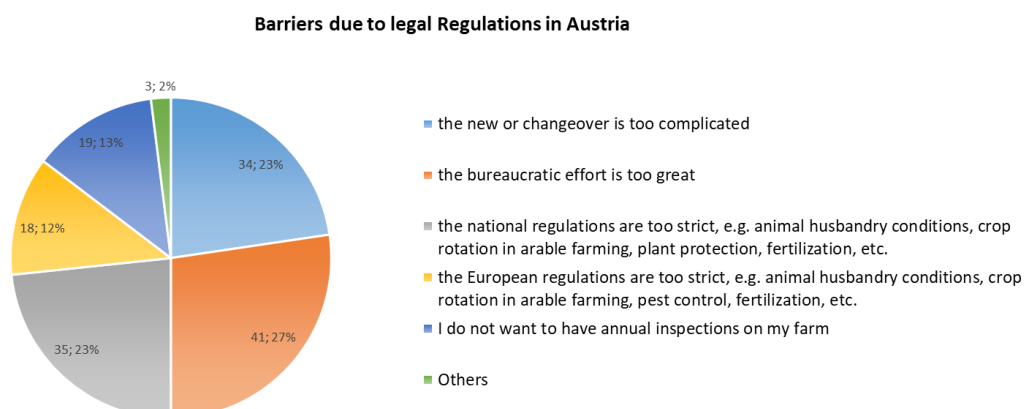
Barriers Related to Economic Viability in Austria

The primary economic barriers to transitioning to organic farming in Austria are higher production costs that are not covered by the higher prices of organic products, as cited by 42 respondents. Another significant barrier is the lack of a direct marketing partner, affecting 26 respondents. Additionally, difficulties in obtaining organic certification and the lack of access to organic seeds were mentioned as issues by some individuals.



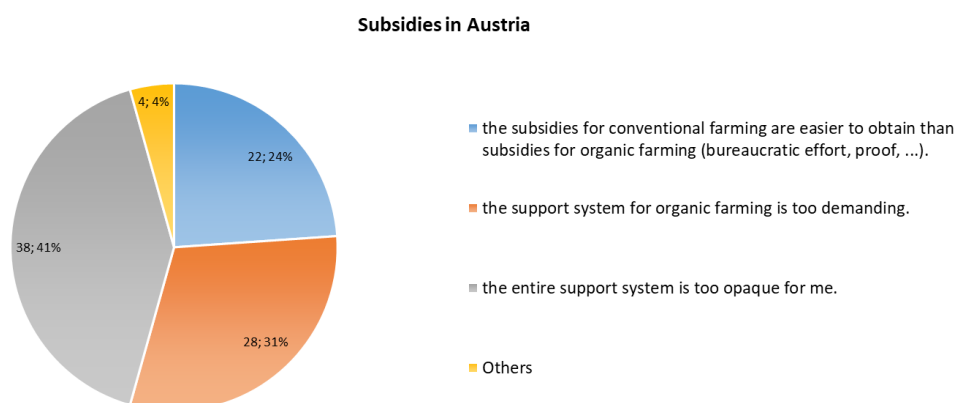
Barriers due to legal Regulations and Requirements in Austria

Bureaucratic burdens are a major issue, with 41 respondents indicating that the administrative workload is too great. Some respondents also pointed out the inflexibility of the certification process and the frequent changes in legal requirements.



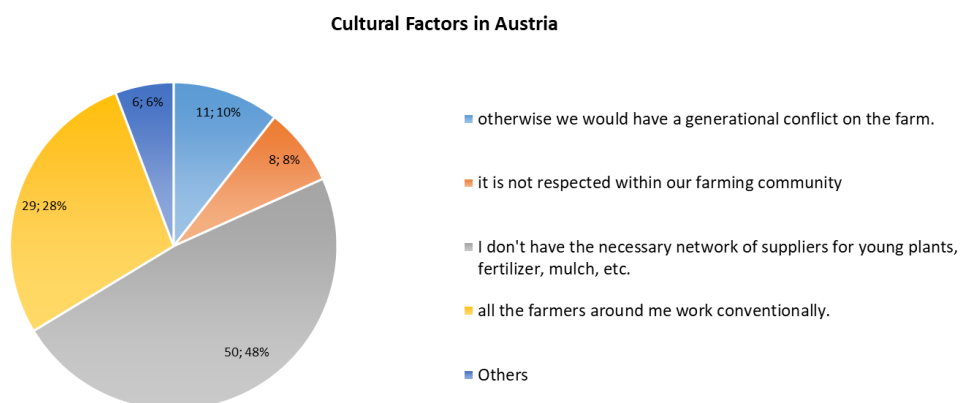
Subsidies and support System in Austria

The complicated and demanding process of getting subsidies for organic farming was a major barrier, with 28 respondents mentioning these problems. Additionally, 38 respondents pointed out that the subsidy system is too unclear and difficult to understand. Other comments included the lack of transparency in subsidy allocation and delays in receiving financial support.



Cultural Factors

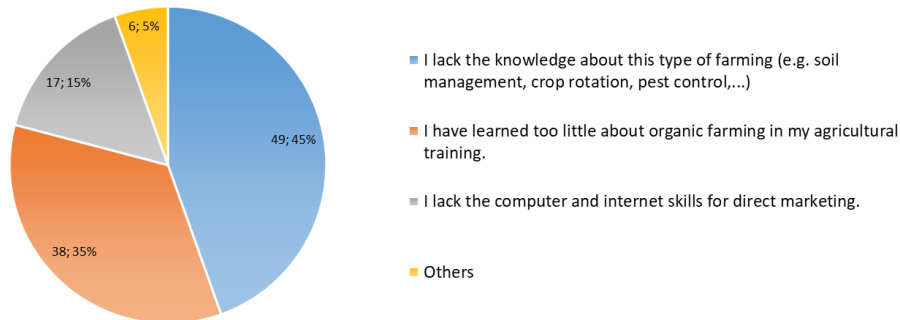
The most significant cultural barrier was the absence of necessary supplier networks, reported by 50 respondents. Additionally, 29 respondents noted that all neighbouring farmers practice conventional farming, making the transition more difficult. Moreover, some participants further mentioned social pressure and scepticism from their local farming communities.



Knowledge in Organic Farming

A lack of knowledge about organic farming methods was a significant barrier, with 49 respondents indicating this issue. Furthermore, 38 respondents felt that their agricultural education did not adequately cover organic farming. Additional comments included the need for better training programs and more accessible information on organic farming practices.

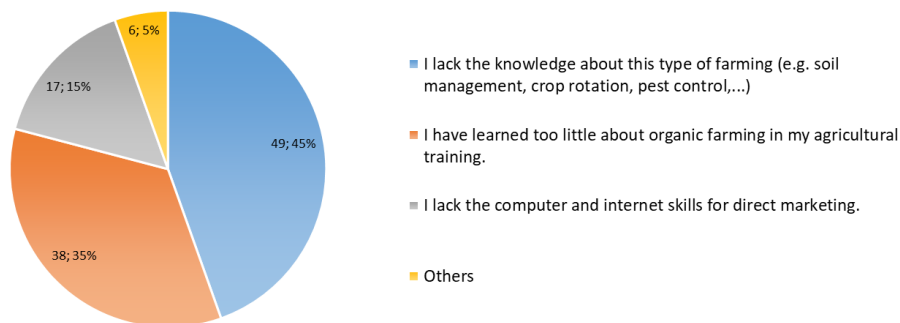
Know-How about Organic Farming in Austria



Other relevant environmental Factors

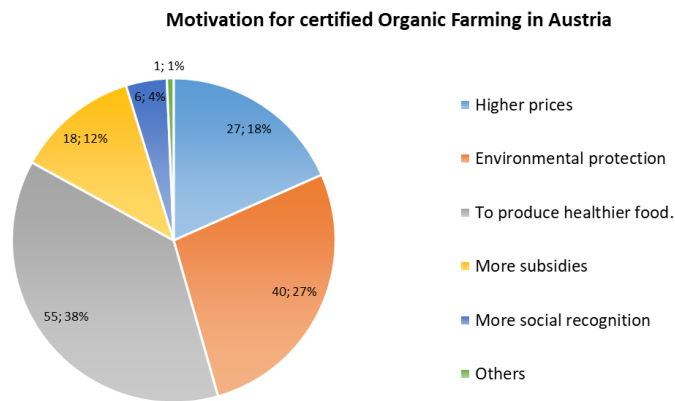
The lack of necessary infrastructure for organic farming was cited by 33 respondents, while 36 respondents mentioned insufficient financial resources for necessary investments. Further, some respondents expressed concerns about the long-term viability of organic farming in the face of climate change and market pressures.

Know-How about Organic Farming in Austria



Motivation for certified Organic Farming

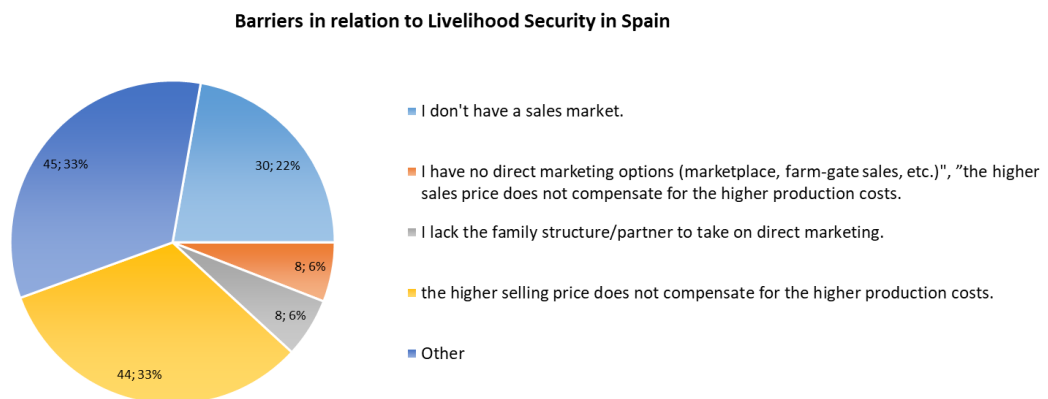
The main motivations for transitioning to organic farming in Austria were producing healthier food, cited by 55 respondents, and environmental protection, noted by 40 respondents. Higher prices for organic products were also a motivator for 27 respondents. Other motivations included a desire for better animal welfare practices and personal health benefits.



Country profile of the results from the needs analysis in Spain

Barriers Related to Economic Viability in Spain

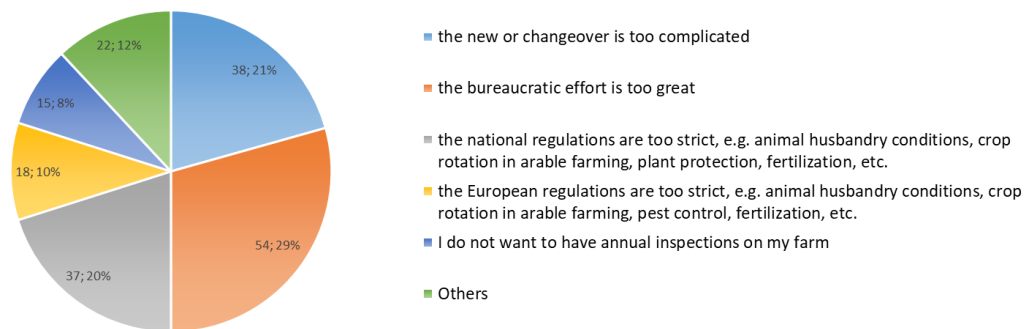
In Spain, the most significant economic barrier is that the higher price of organic products does not cover production costs, as noted by 44 respondents. Another key issue is the lack of a market for organic products, affecting 30 respondents. Some Individuals also mentioned difficulties in accessing organic inputs and challenges in achieving certification. Additionally, some farmers expressed concerns about the limited sales channels available for organic products.



Barriers due to legal Regulations and Requirements in Spain

Bureaucratic burdens were a major concern, with 54 respondents indicating that the administrative workload is too great. Additionally, 38 respondents found the transition process to be too complicated. Others commented that the lack of flexibility in certification processes and frequent changes in regulations.

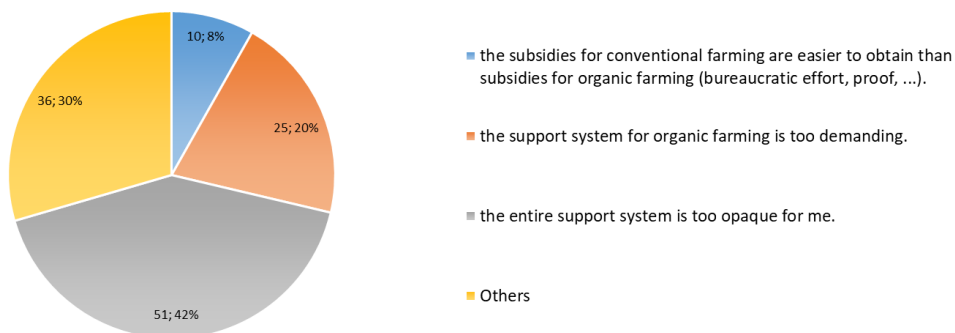
Barriers due to legal Regulations in Spain



Subsidies and support System in Spain

The complexity and high demands of the organic farming subsidy system were significant barriers, with 25 respondents highlighting these issues. Furthermore, the subsidy system is too unclear and confusing, as noted by 51 respondents. Additional comments mentioned delays in receiving subsidies and the lack of adequate financial support for organic farmers. One respondent pointed out the need for more government support to cover the costs of transitioning to organic farming.

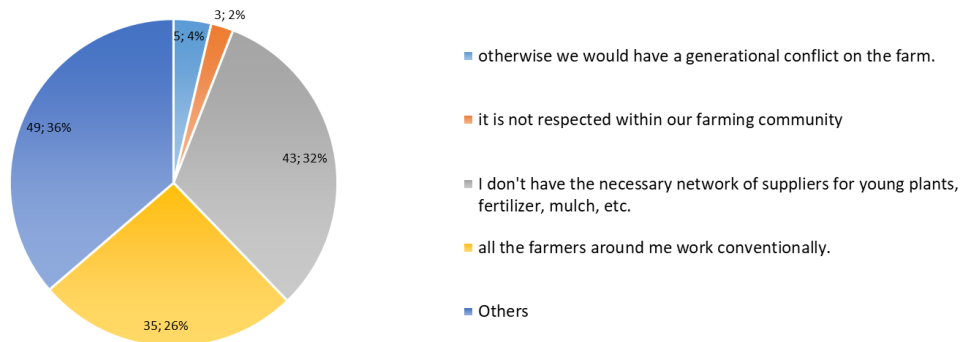
Subsidies in Spain



Cultural Factors

The most significant cultural barrier was the absence of necessary supplier networks, reported by 43 respondents. Additionally, 35 Spanish respondents noted that all neighbouring farmers practice conventional farming, making the transition more difficult. Some participants mentioned a lack of social support and resistance from local farming communities. There were also mentions of insufficient promotion of organic products leading to limited market demand.

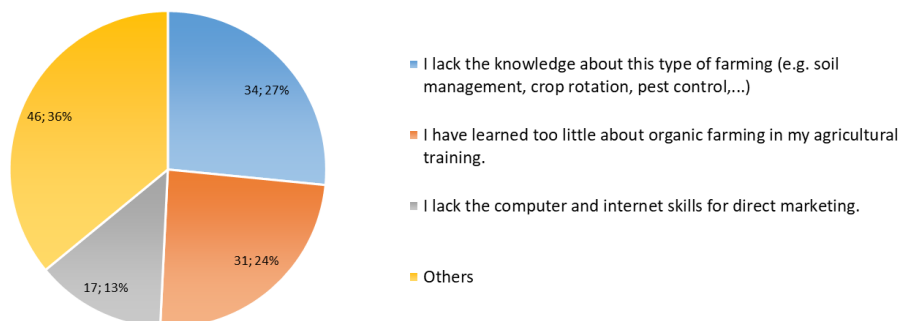
Cultural Factors in Spain



Knowledge in Organic Farming

A lack of knowledge about organic farming methods was a significant barrier, with 34 respondents indicating this issue. Furthermore, 31 respondents felt that their agricultural education did not adequately cover organic farming. Additional comments included the need for better access to information and more training opportunities in organic farming. One farmer stated the need for more specific and accessible training on organic farming techniques.

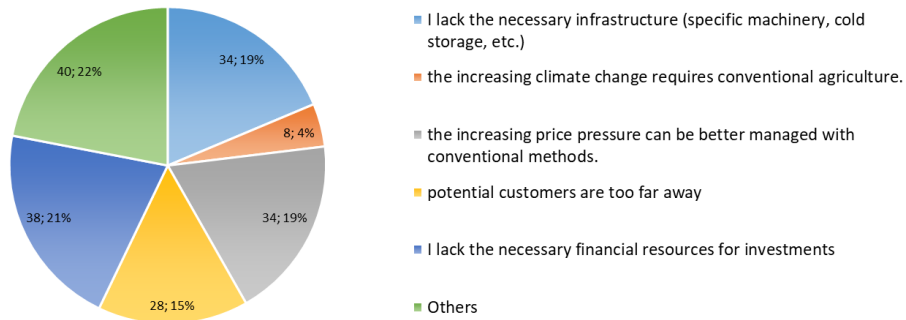
Know-How about Organic Farming in Spain



Other relevant environmental Factors

The lack of necessary infrastructure for organic farming was cited by 34 respondents, while 38 respondents mentioned insufficient financial resources for necessary investments. Moreover, some respondents expressed concerns about the impact of climate change on organic farming practices. Specific concerns included the long-term viability of organic farming in the face of changing environmental conditions.

Other relevant Environmental Factors in Spain



Motivation for certified Organic Farming

The main motivations for transitioning to organic farming in Spain were producing healthier food, cited by 66 respondents, and environmental protection, noted by 71 respondents. Higher prices for organic products were also a motivator for 26 respondents. Other motivations included personal health benefits and better animal welfare practices. Additionally, some farmers emphasized the need for more promotion and education on the benefits of organic farming to increase consumer demand.

Motivation for certified Organic Farming in Spain

