Deliverable 1.1
Mapping of Organic Advisory Services

Validation from the European Commission for this deliverable is still pending

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Document Summary

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DEM	Demonstrator, Pilot, Prototype	
DEC	Websites, Patent Fillings, Videos, etc	
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Executive Summary

The OrganicAdviceNetwork project aims to strengthen and expand organic advisory services to support the EU's goal of achieving 25% organic farmland. In support of this aim, organic advisory services were mapped. This report provides an overview of organic advisory services across Europe, analysing structures, connections, and areas of expertise. Mapping the diversity of organic advisory services is a fundamental task on which further tasks can build on and which is especially important for network building.

The main objectives of the mapping were:

- To collect contact information for the data base for building a strong network
- To show the diversity of advisory services with organic competencies
- To show embeddedness of and interconnections between organisations
- Assess numbers and list competencies/competences of existing services

The main data collection was conducted through an online survey (LimeSurvey) from November 2024 to February 2025. The survey received over 450 responses, with over 350 relevant European entries. The top five countries with the most advisory services with expertise in organic farming were France (80), Germany (41), Hungary (41), Sweden (27), and Bulgaria (24). Responses came from a mix of public institutions, private advisories, NGOs, and farmer organizations. Advisory sizes ranged from one person to organisations with 1,000+ staff, though most were micro-enterprises. Subcontracting and employment were the most common relationships of organisation to advisors. At least 2900 advisors were subcontracted, and 3516 advisors were employed. The sector ranked highest in importance was 'Arable', followed by 'Fruits' and 'Vegetables'. 'Indoor farming', 'Pigs' and 'Poultry' are served less. 50% of advisory services heavily rely on public funding for their overall financing, while other sources like membership fees or private financing including service fees a typically part of the financing. About 50% of the money for organic advisory services relies on public funding. No funding model was dominant. Most common services identified were 'Technical advice', 'Support with public funding applications', and 'organic conversion assistance', highlighting the essential roles these organizations play in helping farmers transition to organic farming indicating that simplifying bureaucratic processes can free up a significant amount of time.

Over 70% of organisations offer at least three different services; 15% offer ten or more About 44% in this data set focus exclusively on organic advice; 59% of advisory time overall is dedicated to organic farming. 16% are active in product sales. The survey revealed that many organizations collaborate with universities, government institutions, indicating a well-connected but varied advisory landscape showing a comparatively high degree of connectivity. Network data shows both strong and weak ties between organisations, with clear evidence of existing cross-European connections.

The compiled data is of good quality but has some limitations as we rely on self-reporting. It also helps identify gaps, such as unclear figures on how many people work in organic advisory. Participation itself served as early engagement with the project. Findings will be utilized for network expansion, cross-visits, analysis of CAP funding, and policy recommendations. The collected data provides a strong foundation for enhancing organic advisory networks, offering valuable insights for future initiatives that support organic farming and farmers' access to expert guidance. The mapping marks a critical first step in activating a collaborative European organic advisory network.

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1 Introduction

The share of organic farmland has been increasing in the last decades. However, the target of reaching 25% organic farmland by 2030 set by the European Union (EU) needs a strong support system for farmers and advisory services alike. The OrganicAdviceNetwork project's aim is to strengthen and enlarge organic advisory services by "creating a strong European network of experienced and new advisors with organic farming expertise". To build and strengthen a network, it is necessary to understand the existing landscape of advisory services working on organic farming, get insights into their work and reach across Europe.

This document maps "the diversity of organic advisory services" for the purpose of gaining an understanding of organic farm advisory systems in Europe and network building. The mapping of the current services will provide a foundation for additional research and serves as an initial step towards achieving the project's overall objective. Mapping is part of the project's Work Area 1 'Co-create and animate the EU network of organic advisors and advisory services' led by IFOAM Organics Europe.

> *The objectives of Work Package 1 are to bring clarity in the complex landscape of organic advisory services, to engage advisors in a structured network, and to provide in-person opportunities for advisors to exchange. The framework's objective is to provide a model to shed light on the contemporary landscape of organic advisory services with the ultimate aim of enlarging and strengthening the network of organic advisors (Grant Agreement).*

More specifically, the mapping follows four main objectives:

1. To collect contact information for the data base for building a strong network (OJ1)
2. To show the diversity of advisory services (OJ2)
3. To show embeddedness of and interconnections between organisations (OJ3)
4. Assess numbers and list of competencies/competences of existing services (OJ4)

We aim to assess the organic advisory landscape by inquiry of general information, finances, service offer and network. The collected information is framed by the structure of the survey and will be utilized in an ongoing process to identify patterns, assess the diversity of services, and establish an overview. Data was primarily collected in Winter 2024/25 and cross-checked with other databases.

The obtained information will be employed for multiple tasks in the OrganicAdviceNetwork project including for example the promotion of the network itself using the collected contacts. This document is divided into two main parts the Data Collection Approach (Chapter 2) and the Presentation of the Data Collection and Analysis (Chapter 3).[1]

Terminology and Concepts

'Mapping' in our project means the structured process of collecting and organizing information and representing relationships between diverse actors and capabilities. It is used to clarify the complex advisory systems and involves identifying connections and patterns to create an understanding of the landscape. Mapping hence does not mean a visualisation of the whole data in form of a single map. As we collected information about several dimensions, a two- or three-dimensional model

[1] Research regarding details of the findings from the data collection will be integrated in the discussion directly.

cannot do justice either way. The following document uses concepts such as '*farm advice*' and '*advisory*'. Given the task of covering diversity, we used a broad understanding for both. '*Farm advice*', or more concretely '*advice*' in this document, refers to expert guidance, recommendations, or instructions given to farmers to help, not only with conversion and organic practices, but anything specific to farmers that can help in their work. Even so, we did not formally define advice at any point, so to include everyone who self-identifies as being part of farm advisory. Instead, we asked anyone, who advises farmers in any form to participate. The concept of '*advisory*' was used in such way to capture as many actors in the field as possible.[2] This was of special interest, since we also want to understand the potential to expand and strengthen organic farm advisory. Beyond the question who actually delivers which organic farming advice, the overall project goal can only be achieved, if we also know 'who could?'.

We decided to use the term *'non-affiliated advisor'* for single persons, instead of using the terms 'independent' or 'impartial advisor'. *'Independent'* and *'impartial'* both might sound useful in theory, but do not capture the reality of the advisory systems across Europe. Especially when looking at networks the underlying assumption is the connectivity within the system, hence the term 'independent' appears counterintuitive. Independence and impartiality are both rather vague concepts in their meaning and possibly unattainable. Our interest was neither the independence from any institution nor to highlight an advisor's possible higher commitment to fairness or lack of bias. The focus instead was attaining a picture of the landscape that is as comprehensive as possible.

Although excluded by the funding framework of the European Commission (see REGULATION (EU) 2021/2115 of the CAP -Common Agricultural Policy), we did not exclude those advisors, who also sell products such as equipment for good reasons. In some European countries such as Bulgaria, the mapping could have excluded a significant amount of people working in farm advisory otherwise, since many at the same time as providing advice also sell products (more than 1/3 in our dataset). Importantly, limited penetration of the organic market in many cases can mean that those advisors, who sell products, are the only ones available, especially in rural areas. Hence, it was not suitable to use the Commission's term 'independent advisor' as in their terms that is somebody, who does not sell anything beyond their services, for the purposes of this task. To enhance readability of this report, we will group the various types of non-affiliated advisors under the term 'advisory services', unless stated otherwise.

[2] With this looser understanding, we are conforming with other European projects such as i2connect.

2 Sampling and Data Collection Approach

The development of the survey for the data collection consisted of multiple steps and combined different approaches. The initial framework was built upon a content analysis of the data from the poster presentations of project partners' organisations,[3] which partners provided themselves at the Kick-Off Meeting, a literature review on organic advisory services and multiple meetings between HNEE, IFOAM OE and ÖMKi. The survey questions were developed co-creatively in a multiple step process including a testing and a refinement phase. Advisory partners in Bulgaria, Estonia, France Germany and Italy were actively involved in the testing the survey and provided feedback in a first phase.[4] Pre-testing the framework in multiple countries with a different advisory landscape allowed to refine the questionnaire. The main data collection took place in a second phase between the November 15th, 2024, and February 17th, 2025.

2.1 Other Databases

Our mapping is not the only collection of data on advisory services. However, other projects had different objectives and hence foci. As prior European Projects have established lists or directories, one option was to build upon such precedent work. Most prominently we considered two projects: the i2connect project[5] whose objective is to "Empower advisors as well as their organizations to engage and support farmers and foresters in interactive innovation processes" and the Organic Farm Knowledge Platform[6] which "aims to increase productivity and quality in organic farming across Europe by connecting farmers, farm advisers and scientists, and thereby, filling the gap between research and practice". I2connect was an EU advisory thematic network project. Organic Farm Knowledge is a platform that gathers practical oriented material for farmers and advisors. While the I2connect project has undergone significant efforts to encourage entries and spent substantial time on the modalities of the database including each feature on their website, reach remains limited. Many major players are notably absent showcasing the difficulty of data collection in the field.

We decided to use the i2connect and Organic Farm Knowledge databases to cross-check and identify additional organisations to contact (Table 1). Our data collection involves additional factors, namely the relationships between organisations and advisors, the financing model and the potential to expand services that differed from prior mappings: Our data was expected to be more comprehensive with at the same time complementary objectives to other data bases given that we wanted to show the diversity also with a focus on organic farming advice. Given that both data bases had a limited number of entries for organisations with organic farming expertise, we decided to ask partners to conduct a full cross-check in the last week of our data collection.

[3] The templates for posters themselves had been inspired by the questionnaire developed in OrganicTargets4EU.

[4] Namely BIOSELENA, EOFF, FIRAB, ITAB, OEBG

[5] https://i2connect-h2020.eu/

[6] https://organic-farmknowledge.org/

Table 1: Overview Databases and Available Data

Project	Focus	Available Information	Numbers
i2connect	Advisory organizations and independent advisors/ non-organic and organic farming	Country, city, type of organization, size of organization, Scale of intervention, sector related fields of expertise, Advisory service-related field of expertise, cross-cutting fields of expertise7	174 entries for organizations and 3464 individual entries for advisors with expertise in organic globally (December 2024)
Organic Farm Knowledge	Advisory organizations/ organic farming	Contact addresses, location, website, 1-2 sentences description	62 entries (March 2025)
OrganicAdviceNetwork	Advisory organizations and advisors/ organic farming	Includes most information of the other two databases, but goes beyond regarding finances, relationships, and services with the specific objective of network understanding and building	364 entries (February 2025)

2.2 Data Collection Approach

The task of mapping advisory services could have been approached in multiple ways (e.g. literature research only, a public and open survey, an invitation-only survey or expert interviews). Given the need for additional and current information, we considered either conducting a public survey or interviewing experts. The advantage of the survey was potentially collecting more data and at the same time possibly reaching further. When it comes to niche services including newer developments, covering the diversity of such 'under-the-radar' advisory services was of particular interest. A further advantage is that we did not have to rely on expert knowledge and therefore on selected individuals' specific knowledge and their availability. Self-reporting covers more grounds, but at the same time has reliability issues and trolling potential.[8] Processes to ensure data quality have to be implemented.

Either way, it became apparent in testing phase that asking advisory services themselves was crucial, since some questions needed insider knowledge (e.g. finances). Hence the decision to rely on participant content generation for data collection was taken confidently.

Data collection and network creation is a continuous process and the survey remains open. Our dataset therefore is constantly changing and expanding. The cut-off date for data analysis for this report was the 24th of Feb 2025 with 364 valid entries, but additional data collected will be used during later stages of this project.

[7] i2connect partly uses different terminology than this document: Scale of intervention translates to Geographical Coverage. Advisory service-related field of expertise and Cross-cutting field of expertise are simply Service Offer in our survey.
[8] Trolling here refers to providing false, misleading, or disruptive responses with the intent to manipulate results or cause confusion.

Survey Design

Each parameter and question serve to capture different aspects of the advisory landscape, shedding light on how these systems operate, their structures, and their strengths and weaknesses. These parameters collectively map the current state and capacity of advisory services, helping to identify gaps, strengths, and opportunities to expand organic advisory. They provide critical insights for policymakers, stakeholders, and service providers.

Altogether our survey has 18 questions covering 'General Information' (such as name geographical coverage, size relationship with advisors and sectors covered), 'Finances', 'Services' and 'Network' (full questionnaire in the Annex). For consistency and neutrality, all response options are listed alphabetically except 'Other', always appearing at the end of the list as it is a widespread practice. The survey consists of a mix of multiple choice, ranking (picking at least one option) and short open-ended questions, integrating both quantitative and qualitative data. Offering various question types can make a survey more engaging for participants, potentially leading to higher completion rates. While there is no means of validation that this choice led to an increased response rate, prior research suggests that it as a typical outcome (see Couper 2008). Interestingly, digital surveys may even be better in data quality, response rate and sample balance than face-to-face interviews (Stadtmüller, Beuthner and Silber 2021). We also opted to make some of the questions conditional on previous answers.

Questions were arranged from more general to specific and included mandatory and non-mandatory questions. The mandatory questions were restricted to the bare minimum. Limiting the number of questions asked to everyone, kept the barrier for participation low. We only determined that 'Name', 'Agricultural Sector(s)', 'Relationship with Advisors' and 'Service Offer' were most essential. This allowed us to cover more advisory services and compile an extensive list. At the same time the more comprehensive entries will feed into later in-depth analyses. Obviously, most decisions regarding the exact format of our data collection have advantages and disadvantages. A successful survey needed both reach and hence simplicity to fill out, as well as a way to capture diverse services.

Data Collection Process

We collected data entirely electronically with the advantage that it was comparatively rigid in regard to the content that can be entered and saving time as it does not require digitalization later. Using LimeSurvey provided simple functionality. While an online survey meant that its link could be easily shared and had a greater potential for distribution, hence higher participation, it required effort to be disseminate the link widely to achieve this.

Project partners were asked to send out emails and newsletters, post on social media and use direct messaging to invite others to participate. In the last week of active data collection, personal contacts at BIOFACH, the world's leading fair trade for organic food, were used to complement digital efforts for promotion of the data collection. Partner organisations' stalls and activities were utilized to further promote the data collection using posters and leaflets. Whereas the effect was limited for the dataset in this document, there was a promotional effect for the overall project, keeping in mind that the overall work package's aim is to animate network building.

Data Handling

For this first analysis of data entries, we removed duplicates and near duplicates and deleted noise.[9] We categorized entries as 'noise' that lacked substantial information (such as contact addresses) and did not bring any results, when searched online. In those cases, we did not only search for the name itself, but also added 'organic farming', if no results came up with a simple search. Altogether, this was the case for less than five entries, for about 10 entries searching allowed to confirm the entry. Data cleaning also included entries with typos and in different languages. Based on the assumption that it is better to have many entries for the same organisation, rather than missing important players, we had encouraged people in waves to participate. Whereas reaching out via newsletters, personal emails and social media posts, increases reach, there is also a danger of more duplicates and inconsistencies. As a consequence, data had to be more carefully checked, compared and validated. For identical entries for the same organisations, the obvious procedure was to simply delete one. If otherwise identical, the survey entry with more information was kept. With near duplicates those with inherent inconsistencies were deleted and those with (more) coherent information were saved (such as proper contact addresses). The next step involved a review by native speakers to check the information and data validity. Project partners were asked to oversee the list of entries for their countries in an ongoing process. To keep track of which entries were combinations or had multiple entries before, the streamlined data entry was marked with different colours.

Having different answers to one question for the same organization may appear unfortunate or even problematic for data analysis, but the fact that different people give diverting information most importantly indicates that numbers are not easy to find even for representatives of an organisation. Inconsistencies between different respondents themselves are an important finding.[10] It indicates that information such as staff employed for organic farm advisory might not be as readily available as necessary for consistent data entries. The conclusion from this is that those questions do not have a clear and easy answer. While inconsistency can question the validity, it is necessary to know that not all actors take the time to do proper diligence to data collection and/or that the information is less apparent and easily available than expected. This could also underline the dynamic nature of the industry that while having some key players for decades, also has many new players and changes within established players' organisations.

Success Criteria for the Data Collection

At the very beginning, it became apparent that a successful data collection cannot be measured by number of entries per country but would need a different matrix. European countries vary in the size and penetration of the organic market, as well as in political systems. Most apparent is the difference between centralized countries with more unified policies and those with responsibility for agriculture located at the state or regional level. Centralized policies could potentially lead to a more homogenous advisory landscape in any given country. Furthermore, expectations amongst partners were different with some partners believing a minimum of ten entries per country was reasonable,

[9] Partners had been instructed to put "Test" into the name section in case, they wanted to try out the survey first, hence this type of entry could be identified easily.

[10] Note that we assume that the inconsistencies stem from lack of knowledge and/or different understanding of the question as there was no conspicuous data entries, which would allow for the assumption of trolling.

while others set the minimum at 25. Here, we jointly took the decision that more important than the number of entries was the question, if we managed to capture the 'most important players' for each country. While identifying those players is obviously partially subjective, trying to capture as many as possible at the same time, can be understood as a means to overcome this bias of deciding, who was important. Lastly, a missing key player could be captured with the last question about the network in case there is no actual entry.

3 Mapping: Presentation and Analysis of the Data

The Task 1.1. survey of the OrganicAdviceNetwork was clicked at more than 1170 times indicating a wide reach. We collected more than 450 responses (incl. duplicates) of which more than 350 were in Europe. Regarding the four main objectives for the mapping exercise in the OrganicAdviceNetwork, the survey shows promising results. The dataset gives sufficient information for an overview of the advisory services and helps to identify patterns. All European countries, except Lithuania, were covered with at least one entry being active in each country.[11]

The number of entries varies widely between different countries, which could be the result of multiple influencing factors. Differences meanwhile cannot be completely explained by differences in conditions, such as market penetration and advisory landscape. The imbalance goes beyond factors related to the status quo of organic advisory systems in a given country. The number also depends on the efforts project partners have undertaken. Some have been very active producing newsletter items and even magazine articles, while others were less creative or lacked opportunities. Finally, a significant factor in reach is subject to algorithms and chance. Well-connected key players sharing the link further might bring more entries.

The following sections will present key findings and highlights in the dataset. It follows the same order and has the same subsections as the survey setup. Each section starts with a table stating the question, instructions and response options, followed by a brief rationale. Such an explanation is integral to this report, but rationales will go beyond simple explanations provided in the tables. This is the case given an exhaustive process of discussions and constant refinement and the nature of diverse reasoning in multi-actor projects. Rationales are necessarily abridged. In these tables setting out the question that was asked, technical instructions such as „drag or double-click" that were shown in the electronic survey are not repeated. Boxes before answers indicate multiple choice. Options shown with bullet-points are items for ranking.

The tables are followed by a presentation of an overview of the results and highlights from those countries with sufficient data for the analysis. We determinate as insufficient data two cases, either there is not enough data overall (less than 10 entries for a country or only a few entries for the

[11] Although the welcome message clearly indicated that OrganicAdviceNetwork asked for the mapping of European services, advisory services from around the world including entries from e.g. Bangladesh, Colombia, Iran and Kenya, registered. While they are excluded from the analysis, it could indicate a demand for a global network. When analysing country specific advisory landscapes, those organisation and advisors, who work in multiple countries were excluded from country-specific analysis.

question for a given country) or that the answers are not sufficiently different to see clear tendencies within the size of our dataset.[12]

3.1 General Information

Basic Information

Table 2: Question Set Up and Rationale: Basic Information

Element	Question and Instructions	Response Options
Name	Name of the Organization or Non-affiliated advisor:	Free text
Basic Information	Year of Foundation: Website: Social Media Channels (list all applicable): Official E-Mail Address:	Free text
Rationale: Collect general information. Instead of asking for a contact person, we asked for an official e-mail address given that staff changes, but official email addresses tend to be long-term, hence such information does not need to be checked and updated regularly, which would be beyond the scope of this project. It also has the benefit of not asking for personal data. For using 'non-affiliated advisor' see Introduction. (Objective 1=OJ1)		

We collected general information from 364 responses to establish our database of organic advisory services in Europe, enabling network building, analysis of service diversity, and identification of key actors in the sector. We started our survey by collecting basic information such as the year of foundation and contact details. The oldest organisation still active in farming advice was established in Sweden in the 13th century. Most of the older organisations active in organic farming advice today are public institutions. However, most entries have given '2024' as the foundation year. This overrepresentation of very recently established advisories could have to do with the fact that newcomers might be much more likely to participate in activities as they just started and hence do not have survey fatigue yet, while actively seeking and needing more opportunities than those who are well-situated in their field.

One of the key functions of the mapping was to collect contact information that could be later used for the animation of the network. The mapping was very successful in collecting contact information, which can be used to form the envisioned network (Work Package, WP1). We collected more than 280 website addresses. We further obtained 53 Facebook accounts, 30 LinkedIn profiles and 20 Instagram accounts. There were also nine links to YouTube channels, three X (previously Twitter) accounts and some links for Spotify and one for Mastodon. This indicates that while there is a variety of social media apps used for advisory, Meta, and even more Facebook, still dominates. Given the nature of our own data collection being online, there is a small chance that services which use social media are overrepresented. However, we judge the effect as unsubstantial given the widespread global use of the internet i.e. saturation. Regarding coverage of social media channels used, the

[12] In rankings, countries excluded have inconclusive due to multiple items sharing the same value or a minimal difference of one, therefore, adding just one more response would not have affected the outcome.

question was misunderstood in some cases, where participants just listed which channels they were using instead of the writing actual account details.[13] If at a later point, the OrganicAdviceNetwork project decides that a more comprehensive list of social media channels is necessary, it would be easy to complement the data, given that email addresses were provided. We also obtained more than 300 email addresses. There was no discernible difference between countries.

Geographical Coverage

Table 3: Question Set Up and Rationale: Geographical Coverage

Element	Question and Instructions	Response Options
Organisations' Geographical Coverage	Please specify the country, region or other geographical unit, where you operate (if applicable). National: Regional: Other:	Free text
Rationale: Understanding the geographical coverage of advisory services is essential for assessing their reach and influence. It helps determine which areas are adequately served and which are underserved, allowing for targeted interventions to promote organic farming. To increase organic farmland across Europe, it is important to identify where advisory services are currently available and where gaps exist. If certain regions lack advisory support, it might hinder the uptake of organic farming. By knowing the geographical distribution, policymakers and stakeholders can focus on expanding services in areas where organic farming is less prevalent. If geographical clusters become evident, this can be valuable for the SWOT analysis (T3.4) as well as in combination with the outcomes of the Common Agricultural Policy (CAP) Assessment (T.3.1). (OJ1)		

Knowing where advisory services are located helps us to see clusters and to understand geographical strengths and weaknesses in the advisory landscape across the EU. Differences in number of entries per country are to be expected, as mentioned above. The following table shows the number of advisory services for each country in our dataset. For those advisory services, which cover more than one country, the pattern appears to be linguistic and/or geographical proximity, which causes are self-explanatory.

If assuming a correlation between number of advisory services and share of organic farmland, France, Italy, Germany and Spain should take the lead with the highest number of advisory services.

> *"The four countries with the largest area under organic farming in the EU are France, Spain, Italy and Germany, with 52% of the total [of EU organic area] in 2012 and 59% in 2020. France in particular increased its area under organic farming by almost 150% since 2012, while Italy almost doubled it (EU Commission 2023:5).*

[13] This did not occur during testing and did not follow the logical progression as the line prior 'Website' and the line after 'Email' were always filled with details and not providing information on the which provider. If a different phrasing of the instructions would have gotten better results, is unclear as ours already followed common practice.

Table 4: Number of Entries per Country (n=364)

Country	No. of Entries
France*	80
Germany*	41
Hungary	41
Sweden	27
Bulgaria*	24
Spain	22
Belgium	19
Italy, Switzerland*	16
Austria	13
Czech Republic, Finland	10
The Netherlands, Portugal	9
Greece	8
Romania	7
Denmark	6
Worldwide	4
Ireland, Kosovo, Serbia, Slovenia	3
Croatia, Europe, North Macedonia, Slovakia, United Kingdom	2
Bosnia-Herzegovina, Cyprus, Estonia*, Liechtenstein, Luxemburg, Malta, Montenegro, Norway, Poland, Scotland, Srpska	1

* Country included in the testing phase of the survey

We had by far the most entries for France, Germany and Hungary (Table 4). The geographical coverage of our dataset represents what can be expected given the official statistics for organic farmland distribution and prior studies. 11 % of French farms were at least partially organic in 2020 (European Commission 2023:15), consistent with the high number of French organic advisory services. For Germany it should be noted that there are regional differences in the coverage with the Western part being better served with advisors on organic farming than the East (Nagy et al. 2023).

The geographical distribution of our data set for Spain and Italy does not fully correspond to the national share or organic farmland. Italy is identified by OrganicTargets4EU as a place with only a few

advisory services with organic expertise and a high dependency on private actors.[14] When looking at the total number of producers Italy is leading with great distance (84.000) nonetheless, followed by France (61.000), Greece (59.000) and Spain (58.000) (FiBL 2025).

Figure 1: Regional Distribution

When it comes to geographical coverage, 233 entries provided information regarding specific regional and not just national coverage. The map above used this information and shows specific regional datapoints.[15] From the map for regional distribution, we can see tendences. First and foremost, regional clusters indicate that an area is well-covered by organic advisory services. Some regions inevitably have better conditions than other places, not just for advisors but farmers as well. Clusters are more likely to occur, when the environmental, economic and political conditions are set up in support of organic farming and for advice. Geographical clusters of advisory services (e.g. Northern Spain) as well as a comparatively even distribution (e.g. Hungary) are unlikely to be monocausal. Further research in the OrganicAdviceNetwork will study the factors behind regional strengths and the potential absence of advisory services working on organic farming further in detail.

[14] https://organictargets.eu/

[15] There was one entry for the Canary Island that is not depicted here, due to geographical distance from Continental Europe and hence for better readability of the map.

Organisational Size

Table 5: Question Set Up and Rationale: Organisational Size

Element	Question and Instructions	Response Options
Organisational Size	How many people work in the organisation (subcontractors excluded)?	☐ 1-2 ☐ 3-9 ☐ 10-49 ☐ 50-249 ☐ ≥ 250 ☐ > 1000
Rationale: The size of the organization can indicate its capacity to deliver advisory services. A larger organization might have more resources, diverse expertise, and a wider reach, even if the focus is not organic advisory services, while smaller organizations may provide more specialized or localized services. Excluding subcontractors at this point provides a clearer picture of the organization's core capabilities and its constitution. Understanding organizational size helps in assessing current advisory services' human resources, assessing the current capacities of relevant actors. Size options take the existence of extremely small-sized organisations and one-person organisations in the field of organic advice into account by introducing a subcategory within what is referred to as micro-enterprises (n ≤9) by the European Commission. The category '50-249' employees is typically defined as medium-sized business, while 250 and more are large enterprises. Assuming that there could be a difference, between organisations with more than 250 employees, but less than 1000 and those beyond 1000, we included an additional option. Accepting that even with the same number of persons employed, a larger organisation will have different advantages and disadvantages, the first questions is addressing the overall size. (OJ2)		

Looking across Europe, the most common size is a staff of one or two people, followed by three to nine (Figure 2).[16] Many advisory services fall therefore into the category of micro-enterprises with less than 10 staff.

A minority of less than 10% of the whole dataset is larger than a staff of 250 people.

[16] Of those that put '1-2' less than 8% put employment as their relationship with advisors. Relationships with advisors will be discussed in more detail in the next section.

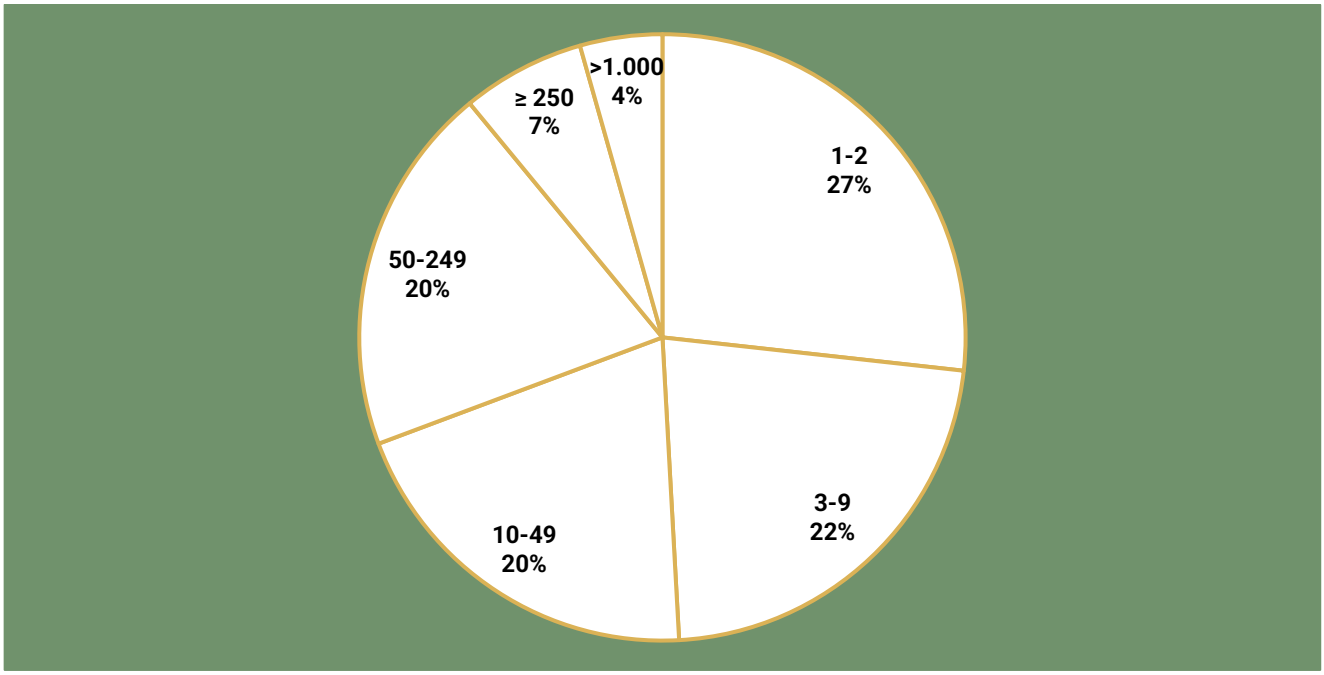

Figure 2: Distribution of Staff Size among All Survey Responses (n=354)

Table 6: Countries and Distribution of Organisational Size (n=354)

Country	1-2	3-49	50-249	≥ 250	>1 000
Austria	1	8	-	1	-
Belgium	6	5	2	1	-
Bulgaria	7	8	3	-	1
France	5	41	28	4	1
Germany	13	16	4	3	2
Hungary	21	12	4	-	1
Italy	3	10	2	-	-
Spain	8	10	-	2	-
Sweden	9	7	4	4	3
Switzerland	2	-	6	2	1

Organisational sizes differ substantially between countries. While one might expect larger organisations in countries with higher shares of organic farmland, it does not explain the distribution in our dataset fully. Similarly, there is no clear pattern along the dichotomy centralized vs. decentralised/federal systems or number of producers. Whereas Italy, France, Greece, Spain and Germany have the highest number of organic producers (Willer, Trávníček, Schlatter 2025:190), given different farm sizes, diverse markets as well as growing conditions, the minimum ratio of advisor to

farmer required is likely to vary. This means that factors for differences in organisational sizes need to be investigated further but should not be studied in isolation and instead should be combined with regional coverage, environmental conditions and funding policies. In our sample organisational sizes appear to have minimal impact on other factors.

Relationship with Advisors

Table 7: Question Set Up and Rationale: Relationship with Advisors

Element	Question and Instructions	Response Options
Relationship with advisors	What is the nature of the relationship with the advisors? Please rank if multiple apply.	Contractually/per service Employment Membership Other
Rationale: This question examines the formal relationships between organizations and its advisors. It helps to understand the general nature of the connection (e.g., staff, per-service contractors, members, etc.). The constitution of an advisory services can help in understanding the inner workings and its network. With the goal of network building and enhancing, the project is interested in the type of relationships. Moreover, different types of relationships can affect the quality and reliability of advice given to farmers. For example, contracted advisors might offer flexibility and expertise for specific projects, while employed advisors could ensure more consistent, ongoing support. While employment is a comparatively stable and direct relationship, service per contract and membership advisors are flexible, but offer less security for advisors and ability to plan. Knowing these relationships helps to understand the sustainability and effectiveness of advisory services in supporting organic transitions. (OJ2, OJ3, OJ4)		
Conditional question, if contractually is chosen	How many people are subcontracted for Organic Advisory Services?	
Rationale: This question was introduced, because project partners representing small-scale advisory services feared that organisational size alone would not cover their work correctly. The use of subcontractors could mean that there is specialized knowledge available for organic advisory services but could also indicate potential gaps in the organization's core competencies. However, it may also indicate differences across countries in organisational style in general not necessarily indicating specialisation. (OJ2, OJ3)		
Conditional question, if employment was chosen	How many advisors are employed?	
Rationale: Following the overall size of the organisation, this is an important question to understand not only the constitution of an organisation and the number of staff, but their actual farm advisors at the moment of mapping. Here, we can collect indicators about status quo and understand the existing capacities in different organisations. (OJ2, OJ3)		

The affiliation of individual advisors and their advisory services provide basic information on how an organisation operates. When it comes to the first rank of the relationship of an advisory service with advisors, almost 40% of respondents selected 'Employment', followed by 'Contractually/per service' with 32%, 'Other' with about 15% and 'Membership' with about 13%. For the second rank, the most common relationship was 'Contractually/per service' with 46%, followed by 'Employment' with 26%, 'Membership' and 'Other' with about 14% each. While almost every respondent had a first rank, only about 1/3 gave an answer for the second rank and less than 1/6 gave a third rank. That means that the majority of organisations has one form of relationship with all the advisors. The mixture at the same time suggests that it is not uncommon to also contract advisors in addition to those employed, which could mean that outside expertise is brought in, or organisations obtain additional capacity in periods of high demand. There is no obvious relationship between organisational size and

relationship with advisors**.** When it comes to size and relationship, only those above 1.000 employees stick out. 10 out of 11 chose 'Employment', with the other entry choosing 'Employment' as their second rank. However, no further correlations are highly visible here.

Table 8: Overall Mentions for Relationships Across Ranks

Relationship with advisors	Contractually/per service	Employment	Membership	Other
Total Number	188	186	98	103

Table 9: Most Important Relationships between Organisations and Advisors per Country, Rank 1-3

Country	Rank 1 (n=354)	Rank 2 (n=125)	Rank 3 (n=54)
Austria	Employment	Inconclusive	
Belgium	Contractually/per service, Employment		Membership
Bulgaria	Membership	Employment	Contractually/per service
France	Employment	Contractually/per service	Membership
Germany	Employment	Contractually/per service	Other
Hungary	Contractually/per service	Employment	Other
Italy	Contractually/per service	Employment	Other
Spain	Contractually/ per service	Employment	Membership
Sweden	Contractually/ per service	Employment	Other
Switzerland	Employment	Contractually/ per service	Other

The prevailing relationship varies slightly between countries.

The two conditional questions yield interesting results that will be further investigated later in the project. The number of advisors subcontracted, and the number of advisors employed varies widely.

Table 10: Subcontracted and Employed Advisors by Country

Country	Subcontracted	Employed
Austria	2 (n=1)	283 (n=5)
Belgium	36 (n=9)	39 (n=7)
Bulgaria	11 (n=5)	287 (n=8)
France	1084 (n=24)	1019 (n=41)
Germany	103 (n=12)	517 (n=16)
Hungary	495 (n=18)	260 (n=12)
Italy	27 (n=9)	16 (n=5)
Spain	25 (n=12)	42 (n=11)
Sweden	221 (n=21)	112 (n=9)
Switzerland	132 (n=6)	221 (n=11)

More than 10 years ago, Paul et. al.'s study focussing on Germany saw an average 87 "clients" per advisor with the highest number of farmers per advisors for public bodies and the lowest for NGOs (2014). Our dataset does not have sufficient data to verify such approximation, however it is important to point out that clients and/or size of farmland per advisor is highly dependent on specialisation and in particular on agricultural sector. While the OrganicAdviceNetwork project expects the 25% target to necessitate at least 15.000 advisors with expertise in organic farming, there are too many determinants to make definite claims.

Estimating Number of Advisors working with Organic Agriculture using Survey Data

For a conservative estimation of advisors subcontracted and employed, we removed the largest outlier for both cases (Table 11). When we consider the 3516 advisors employed and account for the time allocated specifically to organic farming (see Table 24) this corresponds to the equivalent of 2231 full-time advisors dedicated to organic advisory services.

We can further improve the estimate by using proxy numbers for those organizations that opted for a respective relationship with advisors, but did not provide the number of advisors (n=31 for 'Contractually/per service', n=34 for 'Employment'). Using the median as a proxy for the gaps adds an additional 62 advisors to the category 'Subcontracted' and an additional 204 to 'Advisors employed'. As an alternative we used the average as a proxy. In this case there are 589 additional subcontracted advisors and 782 additional employed advisors.

Table 11: Conservative Estimate for Numbers of Advisors Subcontracted and Employed for Organic

Relationship with advisors	Total Number	Median	Average	Additional using median	Additional using average
Subcontracted for Organic Advisory Services (n=155)	2900	2	19	62	589
Advisors employed (n=155)	3516	6	23	204	782
Total estimate of advisors working in organic	6416			6682	7787

Based on our data we estimate that between 6,400 and 7,800 advisors are engaged with organic agriculture in Europe. Given that the survey remains open, we intending to revise the estimate during the project, if additional responses may become available. Agricultural Sector(s)

Agricultural Sectors

Knowing in which agricultural sectors advisory services have competencies, is a fundamental part of our mapping. One important aspect for the mapping is to understand in which sectors advisory services have been active in the last years. Especially when planning for future recommendations, it is important to know.

Table 12: Question Set Up and Rationale: Agricultural Sector(s)

Element	Question and Instructions	Response Options
Agricultural sector(s)	Please rank, if multiple apply.	Arable Fruits Indoor production (e.g., greenhouse) Pigs Poultry Ruminants Vegetables Viticulture Other
Rationale: Knowing which agricultural sectors are being served is essential to understanding the advisory landscape. Ranking the sectors where advisory services are most active helps identify which agricultural sectors are receiving the most support and where there might be gaps. Different sectors may have unique needs, and the ranking provides insight into the focus areas of current advisory services. If the goal is to expand organic farmland, it is important to know which sectors already have robust advisory support and which ones require more attention. This allows for strategic planning and targeted interventions to encourage the adoption of organic practices in less supported sectors, while keeping in mind that these are connected to the market potential of each sector. (OJ2, OJ4)		
Conditional question, if the option 'Other' is ranked in the top three	Please specify which other agricultural sectors are covered.	Free text
We included this conditional question in case an advisory service defines another sector as their core business.		

For instance, when it comes to implementing agricultural and food policies such as an alternative protein strategy with a push towards legumes production, it is good to understand if there is a high number of advisory services active in the sector and broad knowledge exists.Across all countries 'Arable' was the most frequently chosen sector (Figure 3). 42% of the respondents ranked 'Arable' first as their most important agricultural sector followed with great distance by 'Fruits' that was only ranked first by 16% and then 'Vegetables' with about 15%. 'Viticulture' still plays some role.

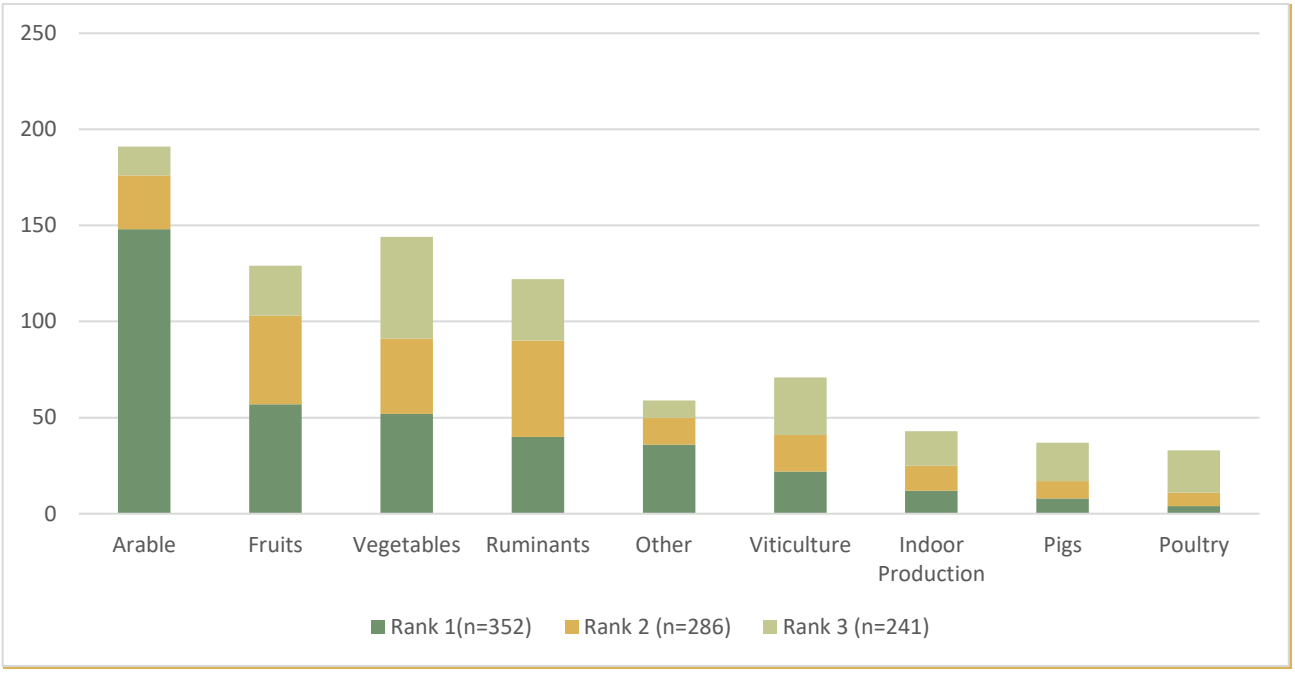

Figure 3: Most Served Sectors, Rank 1-3

In total 'Arable' was listed 244 times, 'Vegetables' 235 times, 'Fruits' 222 times, 'Ruminants' 199 times, 'Viticulture' 128 times, 'Other' 240 times, 'Poultry' 135 times, 'Indoor Production' 125 times and 'Pigs' 116 times.

The largest share in organic farmland in the EU has permanent grassland with 42% (European Commission 2023). It is likely that regulations and natural preconditions set a low barrier for conversion from conventional to organic permanent grassland. 'Arable' could be the most served agricultural sector possibly due to its relative simplicity. Until recently temperate organic fruit farming increased, which could be part of the explanation for its high rank in our dataset as it is in accordance with such development. Globally the two fruits, grapes and olives alone outrank many other crops in total organic farmland, even coffee which stands out with a high market share of the overall market. The market for fresh organic vegetables in Europe even grew 2022/2023, while some other sectors declined (Willer, Trávníček, Schlatter 2025:187). The high number of advisory services working on ruminants correspond to the high share of grasslands in the organic land area in several countries, but profitability for farmers can be relatively low (e.g. Thünen Institute 2024). There are some large European markets, in which many people switched towards plant-based milk and other replacement products. The effects for the demand and price of animal products cannot be forecasted yet.

Indoor farming as well as pig and poultry production appear to have only a minor role in organic farm advisory. Given that the OrganicAdviceNetwork identified and foci on different sectors in different geographies and project partners have special expertise accordingly, there is the possibility that this has an effect on the data collection in favour of the project's foci sectors (see Figure 8 in the Annex) and hence data. However, there is insufficient research to cross-check and validate. 35 entries listed 'Other' as their first choice.

In response to 'Please specify which other agricultural sectors are covered' 'Agroforestry' was mentioned four times, but no other issue stood out. This indicates that our survey's options covered the prevailing sectors. Some inconsistencies here might have occurred concerning the meaning of ruminants and vegetables, as for example in one case dairy cows and olives were listed under 'Other' instead of picking respective overarching categories. If this was simply due to English being a language barrier or a different interpretation by itself, cannot be seen from the data. In clear cases, we replaced 'Other' with the matching category. Notably absent, however, given its potential for carbon sequestration and biodiversity management was a direct mentioning of sustainable management of marshlands. The absence from the dataset could indicate a lack of knowledge or a lack of demand.

Markets have shifted dramatically in recent years. The Thünen Institute shows for example how organic farming has become less profitable than conventional farming since 2021/2022 in Germany, which is an interesting development that might change priorities for advisory services in the near future.

Table 13: Highest Ranked Agricultural Sectors by Country (n =252)

Country	Highest Number of Responses for Rank 1*
Belgium (n=14)	Arable (7), Vegetables (4)
Bulgaria (n=22)	Arable (7), Vegetables (4)
France (n=79)	Arable (32), Vegetables (15)
Germany (n=40)	Arable, Other (11)
Hungary (n=37)	Arable (14), Fruits (8)
Italy (n=16)	Arable (6), Fruits (4)
Spain (n=22)	Arable (7)
Sweden (n=27)	Arable (17), Ruminants (6)
Switzerland (n=15)	Arable, Ruminants (5)

*Brackets indicate the total number for each item.

Entries for specific countries are too limited to draw definite conclusions, but we can show tendencies.[17] Just as to be expected from the results of the overall data set, 'Arable' was ranked first in most individual countries as well. Table 12 shows only the first rank, because many respondents did not provide further information, and lower ranks have inconclusive responses. A surprising outlier was Switzerland, where 'Pigs' were chosen four times as the Rank 3. While not being able to make definite claims, it is central to remember that the task was to map diversity and the essence of a diverse dataset, is a lack of generalizability.

3.2 Finances

Overall Financing Structure

Table 14: Question Set Up and Rationale: Overall Financing Structure

Element	Question and Instructions	Response Options
Overall Financing Structure	Please estimate the distribution of income (in percentage) from each source over the previous two years. Membership fees: Private financing (pay per service etc. incl. donations): Public funding (national, regional, project-based): Other:	Free text
Rationale: Understanding the financing structure of an organisation reveals their financial situation as well as their dependencies. It shows how much of their funding comes from membership fees, service fees, public sources, private investments, or other means. This question can highlight the organization's resilience to funding changes and its capacity to provide unbiased advice. It is relevant to an organisation's identity and set up. The financing structure is a determining factor for the organisational culture and therefore rationale of actions and general functioning. Knowing the funding mix is important because public funding might support specific goals, like increasing organic farmland. If advisory services rely heavily on private or membership funding, their priorities might not align with public policy goals, while at the same time this might give more freedom and ability to plan. Identifying the funding structures can help align resources toward achieving the 25% target. In combination with other questions, it might be possible to see, if a specific a financing structure is correlated with other questions in this survey, hence provide deeper insights in the effects of funding or if it even identifies if it has an impact at all on services. (OJ2, OJ3, OJ4)		

Often, there is a clear relationship between the financial structure of an organisation and its activities. It is obvious that financial stability is essential for an advisory service to function well and work sustainably. Typically, a mix of different income sources provides better resilience in a changing economic, political as well as natural environment.[18]

Some differences in answers for the same institutions have been particularly grave for this question. Although this makes analysis difficult, it raises the important question, if most institutions and

[17] When creating 14 factsheets for the core network country as a part of Task 9.3 the survey data will be complemented by partners. The OrganicAdviceNetwork calls the countries on which we especially focus core network countries.
[18] A comprehensive analysis country-specific analysis of the obtained data will be central to the task 3.1. The Assessment of the CAP.

organisation lack the proper information and/or transparency to provide reliable information on a question that was assumed to be relatively straightforward. At the same time, we unexpectedly had a high response rate, although the financial questions were optional and discussed as possibly sensitive in the workshops leading to the survey development, with almost 200 initial answers.

Table 15:Overall Financing - Distribution of Income from Each Source [19]

Source of Income	Average	Median
Membership fees (n=134)	23,8%	6,5%
Private financing (n=180)	45,5%	30%
Public funding (n=196)	49%	50%
Other (n=71)	8,9%	2%

Almost 15% of the advisory services were 100% publicly funded, while more than 10% did not receive any public funding in the last two years (Figure 2 and Table 14). Private financing, which includes fees that clients pay for a particular service, and membership fees also make up a significant source of income, whereas the option 'Other' is negligible. In particular, when we look at the median, we can see that it has only a minor role for most services. More than 25% of the responses have no income from membership fees, twelve responses on the other hand are 100% membership financed. More than 25 respondents get 50% or more from membership fees.

When it comes to private financing, the contrast of responses is stark as the most common answer was '100%' with 32 responses, while '0' was the second most common answer. The next most common answers were '90%' and '5%', which shows a quite diverse field, when it comes to private financing. For the option 'Other' more than 15% picked a value above 0, but barely any respondents gave an answer to the open-ended questions specifying the source.[20] What is unmistakable from our survey is that a large percentage of financing comes from public funds. It is evident here that the European farm advisory system heavily relies on a continued public support.

[19] Numbers add up to more than 100%, because we looked at the average amount for each source separately using already numbers that were provided as free text.
[20] Again, here might have been trouble with understanding the context as one person put 'projects', another 'compensation' and another simply 'paid', which were all options given next to the option 'Other'.

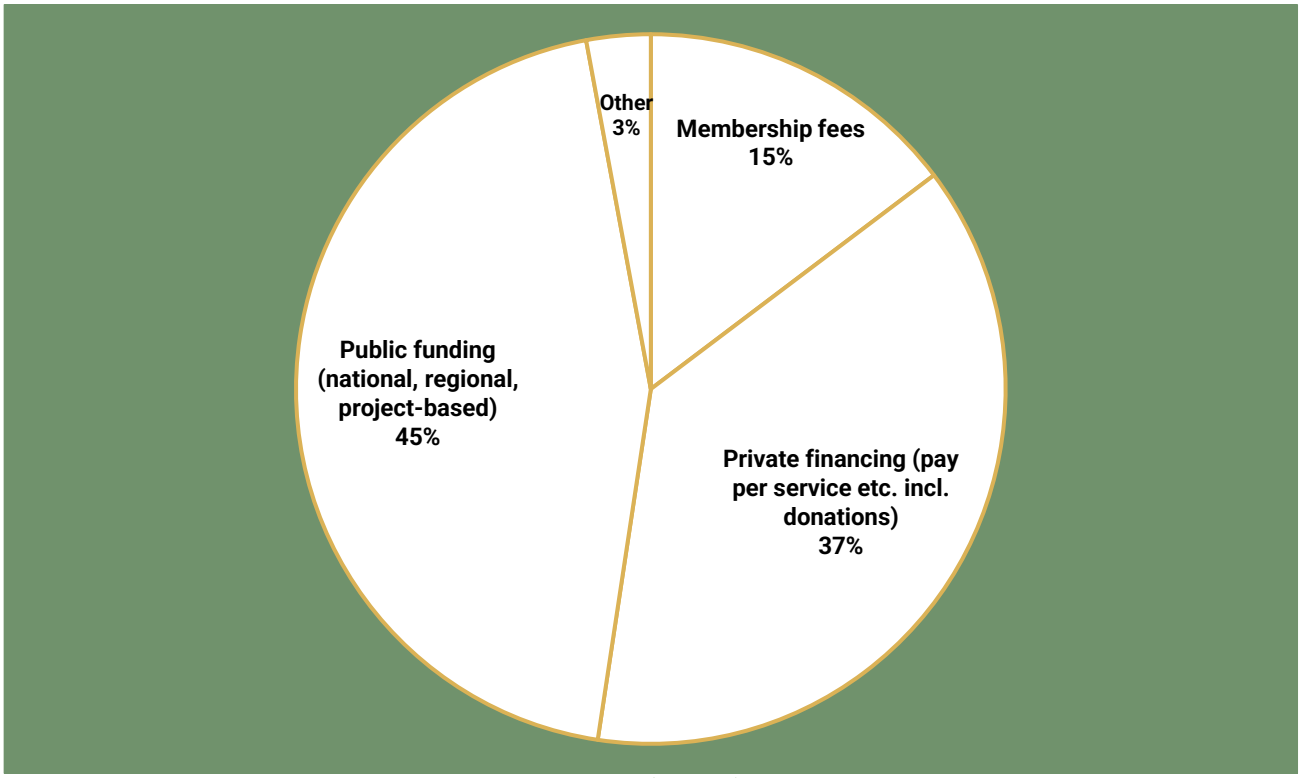

Figure 4: Distribution of Overall Financing Sources (n=234)

How to classify organisations working on agricultural advisory focussing on financing is subject to discussion and central to understanding the nature of the European farm advisory. Our data shows that many organisations rely on public funding even though they are not public institutions. Overall, if empirical evidence shows that the line between publicly funded and privately funded are blurry and offered services are the same, it calls into question the analytical value of classifying organic advisory services along this line. This is also evident in our data set. The authors from the i2connect provided a "Typology of Agricultural Advisory Services", which they divided into public authorities, public research and education, private sector, third sector farmer based and third sector NGOs (Knierim et al. 2021:10f.). The Agrilink21 team, contrarily, emphasized that classifications were not consistent across countries regarding the meaning of public, private, farmer based, semi-public (Labarthe et al. 2020:12). It is unclear, if such division would have provided an additional benefit to our mapping.22 Furthermore, if a private advisory service is mainly publicly funded, i2connects assigned goal of profit orientation falls short, while categorizing it as an NGO in the third sector would be equally problematic.

Centrally, since the OrganicAdviceNetwork focuses on networking and enhancing collaboration, our underlying assumption is that consultancies in the private sector do not need to be competitive only. While this might be the case in places with a high advisor to farmer ratio, in many places in European

[21] Agricultural Knowledge: Linking Farmers, Advisors and Researchers (AgriLink) was another European research project that was ran from 2017 to 2021 and surveyed farmers. https://www.agrilink2020.eu/
[22] Here universities were neither classified as advisory services given its limited relevance, nor were they of interest in any form since education is part of a different task in the OrganicAdviceNetwork.

Union, there simply is a lack of advisors in organic farming expertise as identified by the project Organic Targets 4EU for most of the countries on which they focused (2024).

Since a large percentage of EU funding is attributed to the agricultural sector, a closer relationship between institutions and actors and a relatively high number of actors funded by EU or consecutive national programs are expected compared with other sectors. Financing can create dependencies and hence significantly influence an organisation's approach. For instance, in prior studies a link between public funding and NGO behaviour in terms of a depolitisation of organisations could be established regarding national funding. Bloodgood and Tremblay-Boire (2019) suggest that publicly funded organisations are significantly less involved in policy advocacy, while they assume that given that the EU as a supranational institution is often perceived as lacking democratic legitimacy, it differently benefits from NGOS than nation states. Therefore, they do not find a relationship between funding and depolitisation for the EU level. There are two factors that make farm advisory services different either way. First, the agricultural sector is not like any other sector as it has a special role even in the European history and is central to the European Union (cp. Treaty of Rome). Second, because of the nature of many EU projects on agriculture explicitly working on policy advice and the high rate of involvement organic advisory services in such projects, depolitisation because of public funding is even less likely either way. Accordingly, we do not expect a negative causal relationship between public funding and advocacy work for instance and did not see such in our dataset.

Compensation for Organic Advisory Services

Table 16: Question Set Up and Rationale: Compensation for Organic Advisory Services

Element	Question and Instructions	Response Options
Compensation for Organic Advisory Services	Select all that apply.	☐ Conditional on contract terms ☐ Fee per visit / Price per service ☐ Free ☐ Partly paid by public funds (e.g., vouchers) ☐ Subscription ☐ Other: _____
Rationale: This question looks at how advisors are compensated, which affects the accessibility and attractiveness of advisory services to farmers. It complements the previous question looking at the finances of an organisation from a different angle. Different compensation models (e.g., fee per service, subscription, or public funding) can influence which farmers use the services and how frequently. If organic advisory services are primarily fee-based, smaller or less affluent farms might not access them, limiting the expansion of organic farming. Understanding compensation models helps to identify potential barriers to service access and allows for designing more inclusive advisory services. (OJ2)		
Conditional, if partly paid by public funds and/or free was chosen	Is any public funding from the Common Agricultural Policy (CAP) of the European Union?	☐ Yes ☐ No ☐ I do not know.
Conditional, if there was a positive answer for public funding in prior questions	How much (in percentage) of the Organic Advisory Service itself is publicly funded?	Free text
Rationale: Underfunding is often mentioned as a main barrier to extending organic advisory services work and hence the share of organic farmland. Being able to see and contrast funding sources for advisory services in general and organic farm advisory, complements the understanding of the financing base.		

An essential question was, if the organic advisory services are publicly financed, that is why we asked from multiple angles. Different forms of financing and compensation could lead to differing aims and show varying dependencies. Interestingly, when it comes to the compensations of organic advisory not a single option was clearly favoured.

Table 17: Distribution of Forms of Compensation (n= 286)*

Compensation	Conditional on contract terms	Fee per visit / Price per service	Free	Partly paid by public funds (e.g., vouchers)	Subscription/ Membership
Austria (n=5)	2	5	3	1	4
Belgium (n=14)	4	7	3	3	3
Bulgaria (n=16)	4	9	10	2	5
France (n=57)	24	29	28	34	26
Germany (n=28)	18	18	5	11	5
Hungary (n=29)	15	15	9	2	0
Italy (n=14)	4	5	7	7	1
Spain (n=18)	11	8	13	19	2
Sweden (n=25)	12	27	8	12	15
Switzerland (n=13)	3	11	4	5	5

*Multiple choices possible

Actors depending on farmers' willingness to pay for their services and those who are fully supported by public funds could be expected to show differences in services offered. Moreover, those actors who also sell products such as equipment could be expected to be different from those, who purely focus on services. Looking if financing models make a difference in services offered, is an interesting aspect for understanding the landscape. In order to see, if it is the case, we looked at the two diametrical options in our survey. If there is a difference in services, the obvious difference could be expected between those advisories that offer free advice and those who offer advice with a fee per visit or price by service (Figure 6). However, when comparing services offered by advisories, who only ticked the box 'Fee per visit/Price by service' with those who only ticked 'Free', differences are less stark than expected.

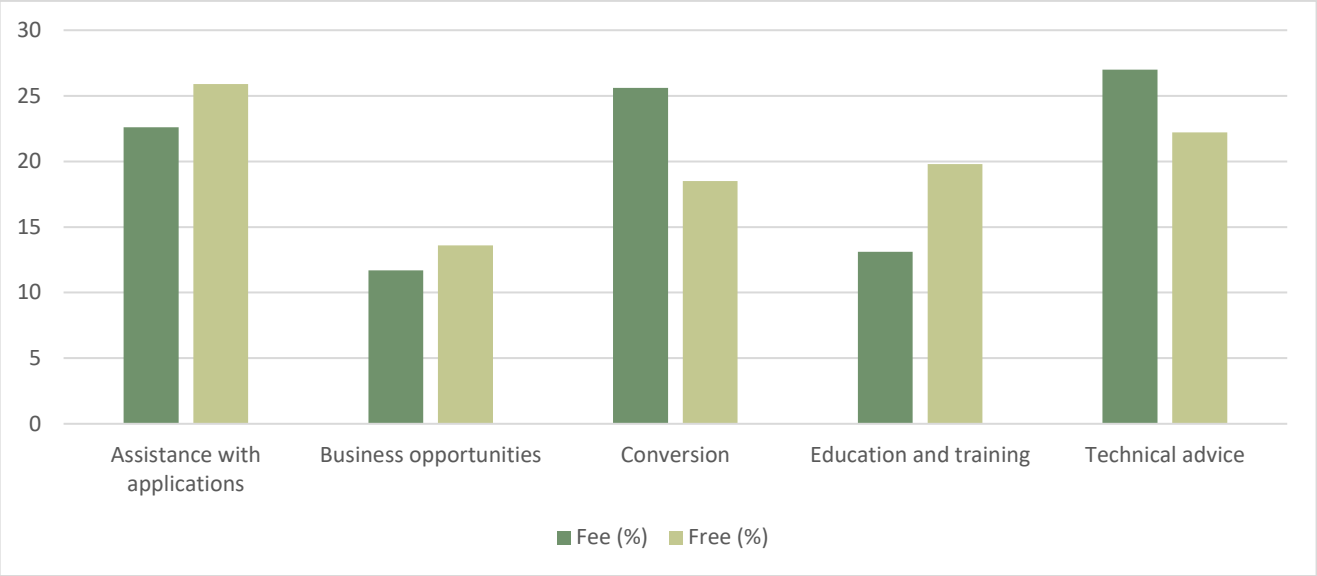

Figure 5: Fee vs. Free - Most Offered Services Contrasted in Percentages[23] (Fee n= 37, Free n=38)

Analysing financial structures and contrasting different country's national policies as well as usage of the CAP in support of advisory services may lead to further insights into best practices and policies that should be emulated. Those who did get public funding and answered the question, whether the funding is from the Common Agricultural Policy (CAP) of the European Union, answers are split almost evenly between 'No' (67 of 173 responses) and 'Yes' (70 responses). A staggering 36 respondents admitted 'I do not know'. Also, many respondents who did not know potentially skipped the question all together.

We got 175 answers on the question, how much of the organic advisory services are publicly funded. The average for public funding here was 48%. There is hence only a small difference between the answers for the general financing of an advisory service with about 45% coming from public funding (cp. results of the previous question) and the ones on the compensation for organic farming advice specifically. This is probably not specific to our dataset as it is an interesting finding in line with the conclusion of Organic Targets 4EU that in many countries organic farming is underfunded. For Austria for example, the authors of Organic Targets 4EU highlight insufficient funding for extension service and bureaucracy as the main hurdle for organic advisors. They also point at an insufficient exchange between research and practice and attest a lack of public funding for the German organic advisory system as well (2024:22ff.). Two countries stick out in our dataset. Hungary has the highest number of respondents answering zero on the question how much of their organic advisory is publicly funded, while Sweden has a high number of respondents, who answer 100%. While there are differences between countries, this needs further investigation. Again, one preliminary conclusion from our analysis is that the funding for organic agriculture advice is not significantly better than other public funding, which is a central question that will be answered in following tasks of the OrganicAdviceNetwork project.

[23] The following section explains the most offered services.

3.3 Services Offered

Table 18: Question Set Up and Rationale: Services Offered

Element	Question and Instructions	Response Options
Services offered	Which of the following services were provided within the last two years? Please rank, if multiple apply.	Assistance with applications for public funding Business opportunities (processing, sale, promotion) Conventional to organic conversion Education and training Environmental advice and climate change solutions Facilitation, moderation and mediation (e.g. operation groups) Financial advice (business plan, investment) Individual coaching and social support Innovation support Legal and administrative support (e.g. bookkeeping, subsidies) Political lobbying/policy advocacy Research Support for the organic certification Technical advice (agricultural)
Rationale: This question aims to identify the actual range of services offered by advisory organizations. It shows where the focus lies and what expertise is not only available, but also in demand by farmers. We opted for a rather extensive list, to be able to more precisely capture the diversity, but also build on it for latter tasks such as the SWOT analysis (T.3.4) and understanding the needs for the development of self-learning pathways for advisors (T5.3.). The restriction to only include the last two years was made from prior experiences with data collection on this question that has seen the tendency of advisory services to include all theoretically possible, rather than what was actually used. Mapping the services offered helps determine whether current advisory services are aligned with the needs of farmers transitioning to organic practices. It can identify areas where new services may be needed to support the 25% target, such as support for organic certification or environmental advice. (OJ2, OJ4)		

In order to understand the landscape, we provided a long list of different services. We focus on those services and specialisations that are directly connected to organic farm advice to understand competencies. We offered a long list of possible services and despite the many options, most important services can easily be identified (see Figure 7). When it comes to services offered, there is not as much diversity across entries as the size of the continent and varied geography could imply, instead huge similarities can be found.

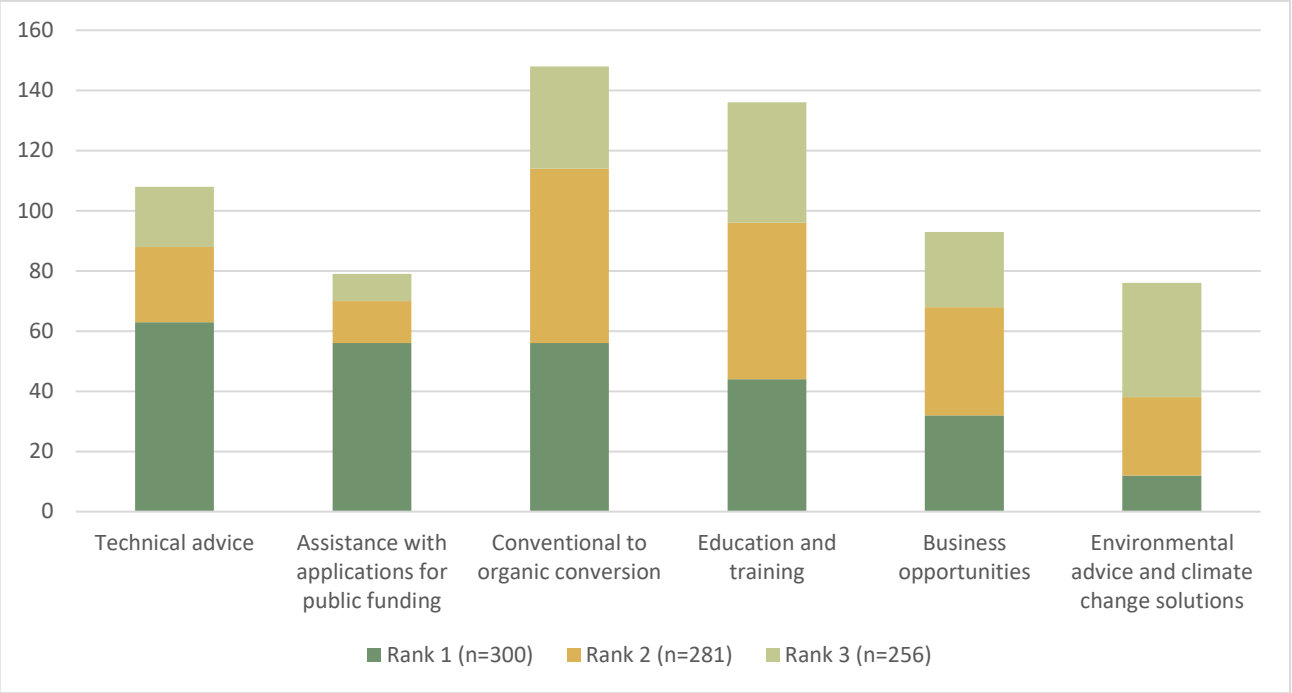

Figure 6: Most Important Services, Rank 1-3

It is not controversial to understand 'Technical advice' as central and hence evaluating its top rank as positive (for more details see Table 31 in the Annex). When it comes to the second place for rank 1, we see 'Assistance with applications for public funding', which is the outcome of an often-criticized tendency that agricultural funds are connected to too much bureaucracy (see e.g. SWG SCAR-AKIS 2017 and Paul et. al. 2014). In regard to the overall goal of the project, this could have potential as reducing administrative barriers and complexity in applications could free time of advisors to play a vital role in services that directly benefit the European organic production. If there was a country, where the advisory services did not rank 'Assistance with applications for public funding' as one of the most crucial services, this would be an interesting case to have a closer look. In that case two reasons could be identified one reason would be that there simply is a lack of availability of public funding, high opportunity costs or at least funds remain untapped, or another reason could be a simplified application process. SWG SCAR AKIS attested a decline in competencies in the technical area, because many advisors were too occupied with applications for public funding (2017). Interestingly, they see the future in advisors working holistically, which is exactly the reality of many services in our dataset. At least 70% of the advisory services offer three or more different services, 15% even offer at least ten different services. Here, it is interesting that there might be the possibility of overservicing and overdelivering. As touched upon in their study of Sweden, Krafft et al. (2022) point out that such may negatively impact time and hence price and also perception of an advisory service by farmers. Our dataset does not show a lack of technical knowledge or implications for a lack of technical knowledge overall for advisors, although that was an outcome of the expert interviews for the SCAR policy brief. While we did not ask directly, if advisory services have technical expertise, offering technical advice can serve as a proxy.[24] Similarly, the authors of the policy brief

[24] Here again this analysis will be complemented by 3.2. Assessment for Education that assesses education including the quality of the education for advisors.

demand a closer relationship between advisors, farmers and researchers. In our sample however 1/3 is involved in research. One explanation could be a disparity between the expert evaluations and the everyday experience of advisors and their perception, while the differences could also be due to developments in the last eight years since the publication of the SCAR-AKIS policy brief and the influence of publicly funded projects.

Table 19: Overall Mentions for Services Across Ranks

Service	Total Number
Education and training	205
Conventional to organic conversion	202
Technical advice (agricultural)	194
Environmental advice and climate change solutions	168
Support for the organic certification	140
Business opportunities (processing, sale, promotion)	131
Assistance with applications for public funding	125
Research	122
Innovation support	119
Individual coaching and social support	103
Financial advice (business plan, investment)	99
Facilitation, moderation and mediation (e.g. operation groups)	96
Legal and administrative support (e.g. bookkeeping, subsidies)	86
Political lobbying/policy advocacy	65

A high ranking for conversion-advice is not surprising given that the number of organic producers in Europe is still increasing (Willer, Trávníček, Schlatter 2025:189). Furthermore, regarding the 25% target of organic farmland by 2030, it is desirable to give some priority to conversion advice, while making sure that organic farmers have the support system to continue.

It is also interesting to explore what services were ranked first in selected countries. Table 20 shows that there were no outliers when it comes to trends between the whole dataset and single countries.

Table 20: First Ranked Services by Country

Country	Most Entries Rank 1
Austria (n=9)	Assistance with applications for public funding
Belgium (n=12)	Education and training
France (n=64)	Technical advice
Germany (n=28)	Conventional to organic conversion
Hungary (n=26)	Education and training
Italy (n=16)	Conventional to organic conversion

It would be interesting to study interpersonal skills of advisory services, but such an evaluation is difficult. Since our study collects data from the perspective of advisory services, there was no value in using self-reporting on subjective factors which may play a significant role in farmers' satisfaction and perseverance. Luley et al. (2014), for instance, collected data from farmers and showed that satisfaction with advisory is largely about subjective traits rather than objectively measurable criteria. This was in contrast to prior research in Germany that had shown that insufficient advisory was the main reason for unhappiness of farmers and that farmers were looking for more expertise (Luley et al 2014:223ff.). Moreover, the assessment of education for organic farming in Task 3.2. includes questions about soft skill trainings, asking the similar questions here would have been repetitive. As described above, we have opted for keeping surveys as short and precise as possible to overcome survey fatigue. So, while we collected competencies, there is no means to verify the quality of the offer.

Again, our mapping does not evaluate quality of services. For France's advisory system, Organic Targets 4EU has identified a need for more advisors and expertise and characterize the lack of funding as the main culprit for the deficiencies in training effort and knowledge sharing (2024:32f.) For Germany, they also saw a lack of knowledge and training for advisors as a barrier (2024:27). Whereas Paul et. al. reported "many active advisors have good educational backgrounds and frequently make use of training opportunities" ten years earlier (2014:3). Similarly, they highlighted for Hungary a lack of expertise is missing. Our data set does neither prove nor support such findings.

Type of Advice

Table 21: Question Set Up and Rationale: Type of Advice

Element	Question and Instructions	Response Options
Type of advice	Select all that apply.	☐ Organic farming ☐ Non-organic farming ☐ Commercial sale of products (e.g. equipment) ☐ Other: _____

Rationale: Understanding whether organizations provide organic, non-organic, or product-related advice helps to assess their focus and relevance to the organic farming goal. It may also show unused potential. A conventional advisors can switch to organic farming advice easier than a layman starting from the beginning. If most advice is not focused on organic practices, this could be a barrier to expanding organic farmland. Knowing the type of advice helps in strategizing how to shift focus or diversify advisory services to support organic growth. We asked for type of advice not only for consistency check that organic farming does play a role in the services, but also to understand capacities (OJ2, OJ4)

About 44% of those organisations that ticked organic farming, are only involved in organic farming advice and not in conventional advice as well. About 16% are involved in sales, which is statistically significant and shows that the decision to not exclude these advisories proved useful for a broader picture.

Table 22: Total Number of Responses on Type of Advice and 'YES' for Sales by Country (n=249)

Country	Engaged in Sales
Austria (n=10)	1
Belgium (n=15)	1
Bulgaria (n=21)	8
France (n=89)	10
Germany (n=37)	2
Hungary (n=40)	6
Italy (n=15)	2
Spain (n=20)	5
Switzerland (n=15)	0

When looking in particular at Bulgaria the demand that "advisors should be impartial and not promoting a specific product or technology" posed by for instance SWG SCAR AKIS4 appears unrealistic (2017:4). Given our numbers, it would be interesting to see, if in fact the assumed partiality has a strong effect of advisors in the field. While a more fundamental analysis is beyond the scope of this deliverable, a comparison between services offered by advisors engaged in sales and those not engaged in sales shows no substantial difference in services offered (cp. Figure 7 and Table 23).

Table 23: Services Ranked First for All, who Engage in Sales

Services	Rank 1 (n=49)
Conventional to organic conversion	16
Technical advice (agricultural)	13
Assistance with applications for public funding	11

What is clear is that numbers of advisors engaged in sales are substantial (e.g. 49 out of 300 answering giving a first rank on services). Efforts to enlarge and strengthen the network of advisors across Europe have to discuss how to involve those often excluded from consideration as well.

Ratio (Time Spent on Organic in Comparison to Other Areas)

Table 24: Question Set Up and Rationale: Ratio

Element	Question and Instructions	Response Options
Ratio	How much of the advisory is related to organic? What percentage of time is spent providing advice specifically in organic farming, in comparison to other areas?	Free text
Rationale: This question goes one step deeper into the question of capacities. If an advisor spends all his time on organic advice, we know that they are already at their limit and cannot take up more organic work, but if it is just a percentage, there is potential. (OJ4)		

The ratio of time spent on organic farming advice is important because it shows potential for upscaling, if we assume that those already engaged in an advisory service face fewer barriers to become a full-time advisor for organic advice compared to total newcomers. The average of responses is 47% with median of 50%. Making use of answers provided in the previous question on 'Type of Advice', we inserted 100% for those, who only did organic farming advice, but did not fill out this question. We then looked at all entries for which, we had information (n=263). The average time rises to 59% and the median even to 70%. Either way, the data indicates huge potential for upscaling.

Specialisation

Table 25: Question Set Up and Rationale: Specialisation

Element	Question and Instructions	Response Options
Specialisation	Is there a specific niche or unique selling point, please specify.	Free text
Rationale: Identifying the unique selling points or niches of advisory organizations helps to understand their specialized areas of expertise and competitive advantages. Understanding unique niches can help to match specific needs of farmers with the right advisory services and highlight areas of strength that can be leveraged to support the expansion of organic farming. (OJ2, OJ4)		

We expected the question for specialisation to be one of the categories, where diversity can be easily shown. Among many topics were: agroecology, AKIS, community integration and coaching, holistic farm management, biodiversity and climate change, biodynamic agriculture, no plough, phytotherapy, plant protection, regenerative agriculture and soil management (for the full list see Table 32 in the Annex). However, the open-ended question about specialisations shows no obvious clusters for the whole data set or for any specific country.

3.4 Network

Agricultural Network

Table 26: Question Set Up and Rationale: Agricultural Network

Element	Question and Instructions	Response Options
Agricultural Network	How is your relationship to other organisations? Please list organisations/partners according to closeness of connection. Include different kinds of relationships (incl. cooperations with specialists) Extremely close relationship: Strong ties: Regular interactions: Occasional interactions: No contact:	Free text
Rationale: Mapping the relationships between organizations helps to understand the collaboration and networking landscape within the advisory ecosystem. It reveals how organizations leverage partnerships and external expertise. It may show already existing networks that can be utilized and strengthened during the project and at the same time possibly show where such connections are missing and need to be fostered. Close relationships and collaborations can enhance the quality and reach of advisory services. Understanding these connections can help identify potential partners and build a more integrated support system for organic farmers, fostering knowledge exchange and innovation. (OJ3)		

The need for better coordination, collaboration and network building has been identified by many European governments. The question of the survey about relationships to other organisations was by far the most difficult to answer and operationalize for analysis. This was not a mandatory question, but data collection did not disappoint. We had 189 respondents listing connections.

Table 27: Number of Respondents Providing Information for Each Relationship Strength (n =189)

Network	Extremely close relationship	Strong ties	Regular interactions	Occasional interaction	No contact
Number of respondents	166	163	164	118	17

For a diverse field like organic agriculture, it is to be expected that connections also include multiple actors with differing expertise. Listed connections cannot be quantified, but the data was collected for and will be used further for network strengthening. There is no easily identifiable difference between countries. Many organisations have network ties with other organisations that also chose to answer the question and are involved in European and international projects, so you can see strong ties across countries. This indicates that projects do have value beyond the work of the project itself as they help forging a European network. One correlation that we expected and can see in the data is that organisations working in projects are better connected overall. Unsurprisingly, the best-connected organisations in our survey were Demeter (13 connections), IFOAM (12) and FIBL as well as FNAB (10).

Many organisations are not only connected to other organisations within the field of organic farming advice, but also closely work with government institutions and universities. As to be expected, the data shows that regional chambers are connected to other regional chambers, but also as it appears with local universities. The relatively high number of universities (21) and research organisations mentioned among the ties, could indicate that there is not only a demand for innovation and expertise, but also that organisations actively seek cooperation. Research in organic farming is funded both at EU level (Horizon 2020 and Horizon Europe) and also features in organic Action Plans of many member states (Lampkin et al. 2025). And there is a strong tradition of farmer involvement in research projects in the organic sector. This is exactly what the authors of the *Policy Brief for the Future of Advisory Services* attested as emerging challenge, namely "linking to international networks to find knowledge and advisors with specialized competences where needed" (2017:5).

Labarthe had highlighted that privatisation weakened the links between different organisations and "components of R&D" more than 15 years ago (2009:199). Whether there are fewer connections between private organisations and R&D and public organisations is an interesting question which we are going to study in a further task of this project. However, the empirical data to actually substantiate such claim with our data is missing as we would need another older dataset to draw comparisons. Strategies to improve relationships have been written, for instance the German CAP strategic plan that especially aims at a better communication and improved coordination between different research institutions and project partners as well as a closer coordination between different actors in the AKIS and agricultural practice (BMEL 2024:79). Something that some of the actors in the dataset are already actively involved in, which can be taken as an example.

Barely, any organisations were listed under 'no contact' except IFOAM which was named four times. This is probably due to its prominent position. An organisation needs a minimum of recognition, so people are aware of its existence for naming them under 'no contact'. These organisations possibly are low "hanging fruits" i.e. interested to be contacted and to forge meaningful connections, but such assumption now will have to be tested in practice.

3.5 Lessons Learnt and Further Research

The biggest obstacle for this survey was reach and survey fatigue. It is inevitable that the same actors are approached by multiple projects with different questions, given that data collection is fundamental for a successful project. This also means that the same actors are approached regularly, possibly by multiple projects at the same time. Hence willingness to engage, quality and quantity may suffer. While we cannot say for sure that some degree of sloppiness was due to survey fatigue, it might have been a factor. For future surveys of this kind, we suggest limiting the open-ended questions to an absolute minimum. For the mapping, there is a clear trade-off in favour of quantity of respondents. There is a fine line between giving enough and precise instructions and overloading survey attendees with text. However, there is an additional benefit of nonmandatory questions. We can see, which questions were easy and/or which information participants are willing to provide.

To minimize overlap collaboration plans are a great tool, but mapping could not have been done by further analysis and integrating existing databases only. Especially, since existing databases such as the list of organic advisory services on the Organic Farm Knowledge Platform and of the i2connect

project have either a very limited number of advisory services overall or only a limited number of advisories with organic farming expertise.

Looking at inconsistency when it comes to different people filling out the survey for the same organisation, double and sometimes even triple entries need to be checked carefully before deciding whether they should be deleted or not. While it may appear cleaner to only have one entry per organisation, exploring them gave us some deeper understanding of the nature of advisory services as a side-effect. We could clearly see that some questions posed serious difficulty for some respondents. Whereas not collecting IP addresses granted a higher level of privacy, we have no way of knowing, if respondents came possibly from same workplaces. If we had expected this, we could have used the function to limit the number of surveys done from the same IP address.

Lastly, to ensure that all project partners are engaging with the survey activities, it is necessary to check-in with each partner regularly and individually. Important instructions can easily be overlooked, when delivered only via email. While we chose a combination of workshops, personal contact and emails to all partners, and the task benefited from a closer contact and monitoring.

Internal Data Utilization

Table 28: Project Tasks and Further Data Use

Direct Use/Indirect Use	Tasks Within the Project
Use new contacts, incl. national information and information on sectors	Recruit and organize a network of organic advisory services, utilizing the results of the mapping to address gaps. (T.1.2)
Utilize map to see clusters and/or actors, e.g. see if interesting topics are mentioned for specialisation.	Plan cross-visits based on identified advisors and their expertise. (T. 1.3)
Use new contacts and their network for outreach	Expand and animate the network of advisors, continuing and finalizing the mapping in extended network countries. (T. 2.1)
Utilize the questions in regard to financing, analyse funding landscape across Europe, compare and contrast with results from T.3.1. to discover best cases and weaknesses.	Assess CAP strategic plans and support measures using the mapped advisory services. (T.3.1)
Compare and contrast results of prior tasks 3.1. and 3.2. educational assessment to discover strength and weakness as well as best practices	Identify drivers and barriers of organic advisory services through SWOT analysis informed by the mapping results. (T.3.4)
Use results from 3.4., which are based on all mapping (T1.1, T.3.1 and T.3.2)	Draft actions to strengthen organic advisory services based on insights from the mapped data. (T.4.1)
Build on T. 3.4 analysis	Action plan for strengthening organic advisory services (T.4.3)
Combine results of Work Package 3 and this this dataset as a foundation.	Mapping existing solutions, needs, and gaps in knowledge, building on the initial framework (T.5.1.)
Produce articles and factsheets based on a comprehensive or spotlighted analysis of the mapping data.	Produce content and dissemination materials based on the profiles and findings from the mapping. (T.9.3)

The results of the mapping will be used in multiple forms within the OrganicAdviceNetwork project. A deeper analysis, including a SWOT, based on the data presented here, will be undertaken from different perspectives for further tasks in the project. The following parallel and subsequent tasks and activities from different work packages will utilize the mapping (Table 26). The list of further tasks that can build onto the collected data is not exhaustive.

4 Conclusion

All four objectives of the task were achieved. With **364 respondents** answering our survey we managed to gain a significant amount of information, despite the difficulties in getting people to take part in a survey in 2024/2025. We gained a clear picture into the work of organic advisory services, regarding sectors as well as services provided. The surveys collected **more than 300 email** contacts, including official emails addresses of organisations as well as mail addresses of non-affiliated advisors and many website addresses that can be further utilized in the project (0J1). This ranged from one person organisations up to organisations with more than 1 000 employees. However, by far **the greatest number of services are micro-enterprises[25].**

The most common **relationships between advisory organisations and advisors are employment and subcontracts**. Our mapping covered 2900 advisors subcontracted for organic advisory specifically and 3516 advisors employed.

While advisory systems covered all agricultural sectors and foci varied, by far **the most served agricultural sector was 'Arable' and then 'Fruits' and 'Vegetables**', while **indoor farming, pig and poultry production appear to have only a minor role** in organic farm advisory.

Advisory organisations varied between public and private organisation including NGOs, with a mix of funding from 100% private to 100%. However, **no single source of compensation was dominant.**

Compensation of organic advisory **did not appear to differ significantly between organic and conventional**.

The most demanded services were 'Technical advice', 'Assistance for applications for public funding', 'Conversion' indicating that easier bureaucracy, when applying for public funding, could free up significant resources and time. Our dataset shows which services are available and beyond this, which services are not just theoretically available but also have been demanded in the last two years and even more in which region services are on offer (OJ4). **More than 70% of advisory services offer three or more different services** with 15% offering at least ten different services. Beyond those more traditional services, advisory services are also engaged in employing cutting edge technology such as drones.

Through open-ended questions, we can identify specializations and innovation and have direct contact with experts active in the field.

In our dataset, about **44% of those organisations only give organic farming advice.** And overall**, 59% of time spent on farming advice by employed advisors was organic advice**. 16% of advisory service

[25] With less than 10 employees

are also involved in sales and these might be important sources of advice in some countries with less well developed organic advisory services.

Overall, the mapping managed to capture the diversity of advisory services (OJ2). Embeddedness and interconnections between organisations are shown in different dimensions and are a strength in the mapping (OJ3). Most prominently by directly asking for the network, we identified **strong and weaker ties between different organisations** and can see already **existing connections across Europe.**

As with any collaborative task that depends on diverse actors and connections, the quality and quantity highly depend on a team effort. The comparatively large dataset collected in a brief period will be used further in the project and can possibly also answer other questions. Surveying helped us to identify knowledge gaps, such as the question of how many people are employed or working in organic farm advice. Taking the potential of certain advisors in becoming fully engaged in organic farm advice and, thus, strengthening and enlarging organic advisory systems, advisors engaged in sales alongside giving advice seem to be particularly interesting. Again, when analysing the network with a focus on strengthening and enlarging organic advisory systems advisors engaged in sales (equipment etc.) might have an easier pathway to becoming fully engaged in organic farm advice than a layman.

What can hardly be measured but is a clear benefit for the overall project, is that taking part in the mapping can be considered as a participative activity. Participation in the survey served as introduction to the OrganicAdviceNetwork project. Accordingly, participants were already actively involved, before the larger outreach tasks such as the cross visits or online learning platform launched (OrganicAdviceNetwork.space), giving the project wider reach and making participants possibly more likely to engage further (cp. Freedman and Fraser 1966).

To conclude, while there are diverse obstacles to drawing a comprehensive picture of the contemporary organic advisory landscape in the EU, the mapping can be seen as a significant step towards the animation of a network of advisors and advisory services.

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6 Annex

Table 29: Questions and Rationale Overview

Element	Question and Instructions	Response Options
General Information		
Name*	Name of the Organisation or Non-affiliated advisor	Free text
Basic Information	Year of Foundation: Website: Social Media Channels (list all applicable): Official E-Mail Address:	Free text
Rationale: Collect general information. Instead of asking for a contact person, we asked for an official e-mail address given that staff changes, but official email addresses tend to be long-term, hence such information does not need to be checked and updated regularly, which would be beyond the scope of this project. It also has the benefit of not asking for personal data. For using 'non-affiliated advisor' see Introduction. (OJ1)		
Organisations' Geographical Coverage	Please specify the country, region or other geographical unit, where you operate (if applicable). National: Regional: Other:	Free text
Rationale: Understanding the geographical coverage of advisory services is essential for assessing their reach and influence. It helps determine which areas are adequately served and which are underserved, allowing for targeted interventions to promote organic farming. To increase organic farmland across Europe, it is important to identify where advisory services are currently available and where gaps exist. If certain regions lack advisory support, it might hinder the uptake of organic farming. By knowing the geographical distribution, policymakers and stakeholders can focus on expanding services in areas where organic farming is less prevalent. If geographical clusters become evident, this can be valuable for the SWOT analysis (T3.4) as well as in combination with the outcomes of the CAP Assessment (T.3.1). (OJ1)		
Organisational Size	How many people work in the organisation (subcontractors excluded)?	☐ 1-2 ☐ 3-9 ☐ 10-49 ☐ 50-249 ☐ ≥ 250 ☐ > 1000
Rationale: The size of the organization can indicate its capacity to deliver advisory services. A larger organization might have more resources, diverse expertise, and a wider reach, even if the focus is not organic advisory services, while smaller organizations may provide more specialized or localized services. Excluding subcontractors at this point provides a clearer picture of the organization's core capabilities and its constitution. Understanding organizational size helps in assessing current advisory services' human resources, assessing the current capacities of relevant actors. Size options take the existence of extremely small-sized organisations and one-person organisations in the field of organic advice into account by introducing a subcategory within what is referred to as micro-enterprises by the European Commission. The category '50-249' employees is typically defined as medium-sized business, while 250 and more are large		

enterprises. Assuming that there could be a difference, between organisations with more than 250 employees, but less than 1000 and those beyond 1000, we included an additional option. Accepting that even with the same number of advisors employed, a larger organisation will have different advantages and disadvantages, the first questions is addressing the overall size. (OJ2)		
Relationship with advisors*	What is the nature of the relationship with the advisors? Please rank, if multiple apply	Contractually/per service Employment Membership Other
Rationale: This question examines the formal relationships between organizations and advisors. It helps to understand the general nature of the connection (e.g., staff, per-service contractors, members, etc.). The constitution of an advisory services can help in understanding the inner workings and its network. With the goal of network building and enhancing, the project is interested in the type of relationships. Moreover, different types of relationships can affect the quality and reliability of advice given to farmers. For example, contracted advisors might offer flexibility and expertise for specific projects, while employed advisors could ensure more consistent, ongoing support. While employment is a comparatively stable and direct relationship, service per contract and membership advisors are flexible, but offer less security for advisors and ability to plan. Knowing these relationships helps to understand the sustainability and effectiveness of advisory services in supporting organic transitions. (OJ2, OJ3, OJ4)		
Conditional question, if contractually is chosen	How many people are subcontracted for Organic Advisory Services?	Free text
Rationale: This question was introduced, because project partners representing small-scale advisory services feared that organisational size alone would not cover their work correctly. The use of subcontractors could mean that there is specialized knowledge available for organic advisory services but could also indicate potential gaps in the organization's core competencies. However, it may also indicate differences across countries in organisational style in general not necessarily indicating specialisation. (OJ2, OJ3)		
Conditional, if employment was chosen	How many advisors are employed?	Free text
Rationale: Following the overall size of the organisation, this is an important question to understand not only the constitution of an organisation and the number of staff, but their actual farm advisors at the moment of mapping. Here, we can collect indicators about status quo and understand the existing capacities in different organisations. (OJ2, OJ3)		
Agricultural sector(s)*	Please rank, if multiple apply.	Arable Fruits Indoor production (e.g., greenhouse) Pigs Poultry Ruminants Vegetables Viticulture Other
Rationale: Knowing which agricultural sectors are being served is essential to understanding the advisory landscape. Ranking the sectors where advisory services are most active helps identify which agricultural areas are receiving the most support and where there might be gaps. Different sectors may have unique needs, and the ranking provides insight into the focus areas of current advisory services. If the goal is to expand organic farmland, it is important to know which sectors already have robust advisory support and which ones require more attention. This allows for strategic planning and targeted interventions to encourage the adoption of organic practices in less supported sectors, while keeping in mind that these are connected to the market potential of each sector. (OJ2, OJ4)		
Conditional, if the option 'Other' is ranked in the top three	Please specify which other agricultural sectors are covered.	Free text
We included this conditional question in case an advisory service defines another sector as their core		

business.		
Finances		
Overall Financing Structure	Please estimate the distribution of income (in percentage) from each source over the previous two years. Membership fees: Private financing (pay per service etc. incl. donations): Public funding (national, regional, project-based): Other:	Free text
Rationale: Understanding the financing structure of an organisation reveals their financial situation as well as their dependencies. It shows how much of their funding comes from membership fees, public sources, private investments, or other means. This question can highlight the organization's resilience to funding changes and its capacity to provide unbiased advice. It is relevant to an organisation's identity and set up. The financing structure is a determining factor for the organisational culture and therefore rationale of actions and general functioning. Knowing the funding mix is important because public funding might support specific goals, like increasing organic farmland. If advisory services rely heavily on private or membership funding, their priorities might not align with public policy goals, while at the same time this might give more freedom and plannability. Identifying the funding structures can help align resources toward achieving the 25% target. In combination with other questions, it might be possible to see, if a specific a financing structure is correlated with other questions in this survey, hence provide deeper insights in the effects of funding or even identify if it has an impact at all on services. (OJ2, OJ3)		
Compensation for Organic Advisory Services	Select all that apply.	☐ Conditional on contract terms ☐ Fee per visit / Price per service ☐ Free ☐ Partly paid by public funds (e.g., vouchers) ☐ Subscription ☐ Other: _____
Rationale: This question looks at how advisors are compensated, which affects the accessibility and attractiveness of advisory services to farmers. Different compensation models (e.g., fee per service, subscription, or public funding) can influence which farmers use the services and how frequently. If organic advisory services are primarily fee-based, smaller or less affluent farms might not access them, limiting the expansion of organic farming. Understanding compensation models helps to identify potential barriers to service access and allows for designing more inclusive advisory services. (OJ2)		
Conditional, if partly paid by public funds and/or free was chosen	Is any public funding from the Common Agricultural Policy (CAP) of the European Union?	☐ Yes ☐ No ☐ I do not know.
Rationale: The Common Agricultural Policy (CAP) of the EU is a significant source of funding for agricultural initiatives, including organic farming. Knowing whether advisory services receive CAP funding helps to show and possibly discover dependencies. The actual percentage of entries employing CAP funding will be used for Task 3.1. the Assessment CAP. Public funding through CAP can be crucial in promoting organic farming. If services are not receiving CAP funding, it could suggest a need for increased advocacy or changes in funding policies to support organic advisory services.		
Conditional, if there was a positive answer for public funding in prior questions	How much (in percentage) of the Organic Advisory Service itself is publicly funded?	Free text
Rationale: Underfunding is often mentioned as a main barrier to extending organic advisory services work and hence the share of organic farmland. Being able to see and contrast funding sources for advisory services in general and organic farm advisory, complements the understanding of the financing base.		

Services		
Services Offer*	Which of the following services were provided within the last two years? Please rank, if multiple apply.	Assistance with applications for public funding Business opportunities (processing, sale, promotion) Conventional to organic conversion Education and training Environmental advice and climate change solutions Facilitation, moderation and mediation (e.g. operation groups) Financial advice (business plan, investment) Individual coaching and social support Innovation support Legal and administrative support (e.g. bookkeeping, subsidies) Political lobbying/policy advocacy Research Support for the organic certification Technical advice (agricultural)
Rationale: This question aims to identify the actual range of services offered by advisory organizations. It shows where the focus lies and what expertise is not only available, but also in demand. We opted for a rather extensive list, to be able to more precisely capture the diversity, but also build on it for latter tasks such as the SWOT analysis (T.3.4) and understanding the needs for the development of self-learning pathways for advisors (T5.3.). The restriction to only include the last two years was made from prior experiences with data collection on this question that has seen the tendency of advisory services to include all theoretically, rather than what was actually on offer. Mapping the services offered helps determine whether current advisory services are aligned with the needs of farmers transitioning to organic practices. It can identify areas where new services may be needed to support the 25% target, such as support for organic certification or environmental advice. (OJ2, OJ4)		
Type of Advice	Select all that apply.	☐ Organic farming ☐ Non-Organic farming ☐ Commercial sale of products (e.g. equipment) ☐ Other: _____
Rationale: Understanding whether organizations provide organic, non-organic, or product-related advice helps to assess their focus and relevance to the organic farming goal. It may also show unused potential. A conventional advisors can switch to organic farming advice easier than a layman starting from the beginning. If most advice is not focused on organic practices, this could be a barrier to expanding organic farmland. Knowing the type of advice helps in strategizing how to shift focus or diversify advisory services to support organic growth. We asked for type of advice not only for consistency check that organic farming does play a role in the services, but also to understand capacities (OJ2, OJ4)		
Ratio	How much of the advisory is related to organic? What percentage of time is spent providing advice specifically in organic farming, in	Free text

	comparison to other areas?	
Rationale: This question goes one step deeper into the question of capacities. If an advisor spends all his time on organic advice, we know that they are already at their limit, but if it is just a percentage, there is potential. (OJ4)		
Specialisation	Is there a specific niche or unique selling point, please specify.	Free text
Rationale: Identifying the unique selling points or niches of advisory organizations helps to understand their specialized areas of expertise and competitive advantages. Understanding unique niches can help to match specific needs of farmers with the right advisory services and highlight areas of strength that can be leveraged to support the expansion of organic farming. (OJ2, OJ4)		
Network		
Agricultural Network	How is your relationship to other organisations? Please list organisations/partners according to closeness of connection. Include different kinds of relationships (incl. cooperations with specialists) Extremely close relationship: Strong ties: Regular interactions: Occasional interactions: No contact:	Free text
Rationale: Mapping the relationships between organizations helps to understand the collaboration and networking landscape within the advisory ecosystem. It reveals how organizations leverage partnerships and external expertise. It may show already existing networks that can be utilized and strengthened during the project and at the same time possibly show where such connections are missing and need to be fostered. Close relationships and collaborations can enhance the quality and reach of advisory services. Understanding these connections can help identify potential partners and build a more integrated support system for organic farmers, fostering knowledge exchange and innovation. (OJ3)		

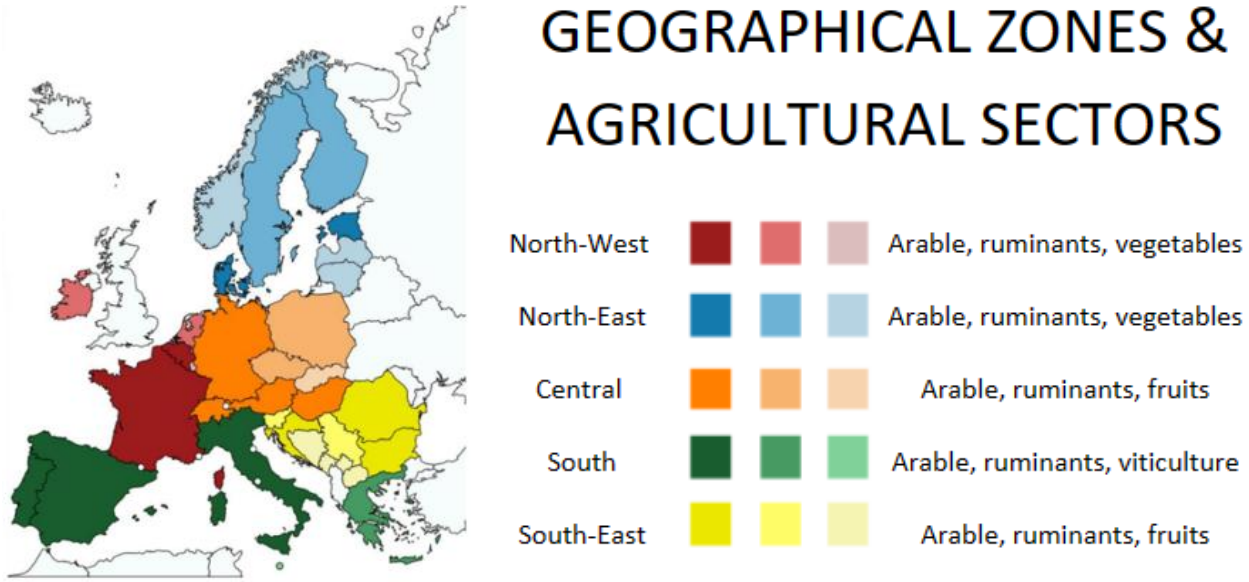

Figure 7 OrganicAdviceNetwork's Geographical Zones & Agricultural Sector Foci.

Table 30: Agricultural Sector(s), Rank 1-3

	Rank 1(n=352)	Rank 2 (n=286)	Rank 3 (n=241)
Arable	148	28	15
Fruits	57	46	26
Indoor Production	12	13	18
Other	36	14	9
Pigs	8	9	20
Poultry	4	7	22
Ruminants	40	50	32
Vegetables	52	39	53
Viticulture	22	19	30

Table 31: Top Five Most Served Services, Rank 1-3 (Total Number of Responses)

	Rank 1 (n=300)	Rank 2 (n=281)	Rank 3 (n=256)
Technical advice	63	25	20
Assistance with applications for public funding	56	14	9
Conventional to organic conversion	56	58	34
Education and training	44	52	40
Business opportunities	32	36	25
Environmental advice and climate change solutions	12	26	38

Table 32: All Answer on Specialisation (raw data)

Is there a specific niche or unique selling point, please specify.
9 dedicated organic advisors and specialists, Accounting and business economics, Advocacy, Adventure Trail of Biodiversity - Regenerative Organic Garden Tours, AGRINOVA BIO 2000, Agrobiodiversity, Climate impact calculations, organic pig farming, organic poultry farming, Agroecology, Agroecology practices, phytotherapy (herbal veterinary medicinal products), crops for forage and pasture, Agroforestry, AKIS, Allowed fertilizers, permitted plant protection, etc. especially for vineyards, cereals, Apple and pear production, Approach to advising farmers in organic agriculture through a systemic approach and group agriculture (promoting cooperation rather than competition), Arable crops in organic and regenerative farming, Arable farming, forage production, business management, Arca has developed a private protocol ORSS® Organic Regenerative agriSoil System, to implement in organic local farms. The production system is mainly based on the long crop rotation, the application of cover crops, minimum tillage and intercropping. The expert combination of such practices with innovative equipment and 4.0 agricultural technologies allows the regeneration and improvement of biodiversity in the soil ecosystem, leading the production of organic food with high environmental and nutritional value in accordance with One Health approach, Assistance to organic advisors, B2B, Biocyclic vegan agriculture, Biodiversity, Biodynamic Agriculture, Biodynamic farming, Climate Change, Climate Change Management; Development of Farm Climate Strategies; Strategic Farm Development, Common thread of Regenerative agriculture / Agroecology / Organic farming / Permaculture, Communication of research results, Community Supported Agriculture, Agile work, Cooperation territoriale

faisant le lien entre les acteurs privés et publics des filières, Cooperative model, Cultivation Plan; Plan for Organic production; Support and Funding; Regulations of Organic Farming, Development of new mini organic raspberry production projects; consulting service in certification, quality control and purchase of organic strawberry and organic raspberry from Balkan Region and EU, etc., Ecological greenhouse production, ecological outdoor cultivation, ecological direct sales, Event focused on organic farming and alternative agricultural techniques, Exclusive organic and biodynamic, Experts in Organic Aquaculture and Experts for wild catch seafood, Farm development & internal collaboration coaching, Farming with the Networks of Nature - a holistic approach to regenerative organic farming; Organic Farming and Biodiversity - Farming in balance with all living things, FB: Matrix Drops Agriculture, Flat rate advice, flexibility in focus areas, Food law and labelling, Gesamtbetriebliche Beratung, Grandes cultures majoritairement, Housing of animals, Humorous and very close communication, Information on the requirements of organic agriculture and organic livestock farming on farms, Integrated Farm Management, to regenerate the farm(-er) often developing from a soil issue to a non-ploughing system with integrated cover crop mixtures to sell healthy produce. We utilize nature's opportunities!, Introduction and establishment of organic food in communal catering (including RIBE consulting), IPM / Crop Protection, Landscape management, pasture animal husbandry, biodiversity promotion in arable farming, Ley and grazing strategy, crop rotation in relation to ley and grazing, Local/regional markets, Maraîchage sur Sol Vivant, Market Gardening, Methanization, Multi-sector, No-till, Nutrition of farm animals, welfare, health management of animals, biosecurity etc., OGG, Olive culture, On-farm processing; artisan method of processing, direct sales, Organic agriculture regulations, Organic agricultures/ Management Innovation of Agricultural and Food systems, Organic and sustainable territorial /farm design and management, Organic farming, Organic fruit production, Organic inputs, Our job is to make the best market information system for the members (Cooperatives, Fruitgrower-Groups), Own label / certification, Permaculture, grazing planning, Plant protection, Pome fruit, Potatoes, Promotion and development actions for AB, Regenerative Agriculture, Regenerative Agriculture, soil food web, Rural agriculture / Support for setting up and transferring farms, Scottish agricultural systems, Seeds production and marketing, Self-built tools, Semillas, Service is free, 100% organic and advisors have a long history and knowledge, Small farmers, Small farmers (under 50,000 SO), Soil health, Soil Management, Soil regeneration, Specialization, Specialization in cattle, Starting up small scale fruit - berries and vegetable farms, calculation and group advice to be able to stay organic as a dairy farmer, expanding organic or convert to organic cattle farming, convert, expand or convert to different crop cultivation, Strategy for crop rotation, weed control, regenerative agriculture, organic market and education for farmers, Strategy, strategic advice and representation of Nature in the board, Supporting small farmers and stopping migration towards urban areas, System approach, participatory approach, use of an agroecological indicator system (OASIS) on each farm/year, combination of individual and group intensive coaching, Train with experience sharing, Transition to regenerative Agriculture, Vegetables, Vegetable growing, open field and greenhouse, Viticulture, olive growing, Volailles et palmipèdes pour mon poste précisément.

Partners

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