

A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills

# “Observatory- Working Groups (WGs) Report 2025”

**Agrifood Pact for Skills Observatory  
Erasmus+ Project AGRIFOODSKILLS**  
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This report presents the annual summary and progress of the Observatory and its Working Groups, highlighting strategic activities, governance, stakeholder engagement, and key achievements for the year 2025.

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### 1. Introductory overview of the Observatory and its Working Groups

#### 1.1 Structuring Activities for the Agrifood Pact for Skills Observatory – Year 1

The Agrifood Observatory Pact for Skills (OAF) is a strategic, collaborative initiative established within the AGRIFOODSKILLS project and designed as a long-term resource for members of the Agrifood Pact for Skills. Its mission is to identify, analyse, and anticipate evolving skills needs and job trends in the European agrifood sector. By providing strategic intelligence, facilitating stakeholder engagement, and promoting knowledge-sharing, it supports long-term workforce development and capacity building across the sector.

During its first six months (January–June 2025), the Observatory focused on building a solid, inclusive, and sustainable foundation for its future work. It is designed not only as a monitoring mechanism but as a coordination platform that aligns sectoral needs, fosters collaboration, and cultivates a dynamic community of practice capable of addressing both current and emerging skills challenges.

#### 1.2 Governance and Organisational Framework

A clear governance structure was established, comprising an Executive Core Group, a Joint Assembly, and eight thematic Working Groups (WGs). The Executive Core Group, including project coordinators and key social partners, are tasked with overseeing the Observatory's operations and ensuring continuity beyond the project's duration. The Joint Assembly, made up of all project partners and signatories, is empowered to make strategic decisions and approve proposed actions. Each WG was assigned a leader and co-leader, responsible for specific thematic areas.

#### 1.3 Working groups

To ensure effective coordination and targeted action, the Agrifood Observatory Pact for Skills established eight thematic Working Groups, each addressing a critical dimension of the sector's skills and innovation agenda. The WGs are as follows:

- **WG1 Monitoring** – responsible for collecting, analysing, and sharing labour market intelligence in the agri-food sector, supporting the Observatory's development and sustainability. (Leader: LVA, Co-leader: CLAN)
- **WG2 Skills Intelligence** – focuses on analysing current and future skills needs, labour market trends, and emerging competencies. (Leader: ISEKI, Co-leader: EFFAT)
- **WG3 Communication & Dissemination** – tasked with promoting Observatory activities, sharing results, and engaging stakeholders through various channels. (Leader: CONFAGRI-PT, Co-leader: FIAB)
- **WG4 Roadmap, Business Model and Long-Term Action Plan** – dedicated to strategic planning, sustainability, and the development of a robust business model for the Observatory's future. (Leader: CONFAGRI, Co-leader: CBHU)
- **WG5 Quality and Certification** – overseeing the establishment of standards, quality assurance processes, and certification frameworks for training and skills development. (Leader: INFOR, Co-leader: AERES)
- **WG6 Scenarios and Policy Forum 2050** – providing foresight, scenario analysis, and policy recommendations to guide long-term sectoral transformation. (Leader: CONFAGRI, Co-leader: FDE)
- **WG7 Micro-credentials Learning Design** – designing flexible learning pathways and developing micro-credential frameworks to support lifelong learning and upskilling. (Leader: ICOS, Co-leader: UNITE)

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- **WG8 Training Content Repository** – curating, organising, and maintaining a central repository of training materials and resources to support the Observatory’s educational objectives. (*Leader: UNITO, Co-leader: EIT Food*)

### 1.4 Operational Setup and Processes

During the first year, the Observatory partners spent the initial six months establishing its structure, aligning on objectives, strategies, and operational frameworks through a series of online and in-person meetings. The Observatory’s design is light yet effective, enabling agile responses to sectoral changes and supporting long-term sustainability. Core operational practices include regular partner meetings, annual reporting, and coordinated updates to the Pact for Skills platform. Following this initial setup, the Working Groups (WGs) began their activities in July 2025, with their progress documented in the first-year report.



### 1.5 Stakeholder Engagement

Active engagement with a broad spectrum of stakeholders is a priority. The Observatory brings together industry, academia, training providers, social partners, and policymakers through annual meetings, dissemination events, and collaborative activities. The Policy Forum 2050 is established as a technical-scientific committee to guide the direction of the WGs and provide strategic input from EU Commission DGs and international experts.

### 1.6 Impact and Next Steps

The structuring activities in year one have positioned the Observatory as a cornerstone for sustained collaboration, knowledge exchange, and strategic alignment within the European agrifood sector. The participatory governance model, flexible operational framework, and commitment to open access and continuous adaptation ensure the Observatory’s relevance and impact well beyond the initial project timeline. In the coming year, the focus will shift to consolidating operational practices, expanding stakeholder engagement, and delivering tangible outcomes through the coordinated efforts of the Working Groups.

### 1.7 General progress

During the first reporting period, the AGRIFOODSKILLS Observatory made strong progress in building the structures and tools that will directly support the Agrifood Pact for Skills members in understanding and addressing evolving skills needs across the agri-food sector. All Working Groups are now fully active and have started generating outputs that enhance the Pact’s collective knowledge. WG1 began defining key monitoring indicators with the Pact for Skills members’ engagement and launched the first annual P4S member survey, ensuring that members’ perspectives guide the Observatory’s analytical work.

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WG2 began by mapping the occupational profiles of the sector and will continue with identifying the sectoral skill needs, aiming to provide P4S members with a clearer overview of evolving competencies across the value chain. Strategic development was also accelerated: WG4 developed a 12-year roadmap and a tailored business model, providing a clear pathway toward financial sustainability and operational autonomy beyond the project's lifespan.

In parallel, the other Working Groups made important contributions to quality, foresight, and capacity building across the Pact for Skills community. WG5 began work on comparing quality assurance and certification frameworks, contributing to initial discussions on approaches to micro-credential recognition. WG6 enriched long-term scenario development and policy debate through updated foresight exercises and expert engagement within the Policy Forum 2050. WG7 initiated activities on the design, governance, and pedagogical aspects of micro-credentials, considering EU standards and sectoral requirements. WG8 started working on a centralised training content repository, supported coordination with other WGs, and reached out to external networks to explore potential materials.

Collectively, these achievements illustrate a coordinated and forward-looking effort that positions the Observatory as a foundational mechanism for skills intelligence, stakeholder collaboration, and innovation in the European agri-food ecosystem.

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### 2. WGs summaries and progress

#### 2.1 WG1: Monitoring

##### 2.1.1 Objectives and scope

WG1 aims to create a robust and harmonised framework for gathering, analysing, and disseminating labour market intelligence within the agri-food sector. Its primary objective is to support the development and long-term sustainability of the Observatory by ensuring that data-driven insights inform policy decisions and skills strategies across Europe. Through systematic monitoring, the WG will enable evidence-based planning and foster resilience in workforce development.

The scope of WG1 encompasses four key areas: (1) coordinating and collecting authoritative European and national data sources on occupations and labour trends; (2) designing and conducting annual surveys to engage Pact for Skills signatories and track upskilling and reskilling initiatives; (3) communicating findings through newsletters, reports, and contributions to the Pact for Skills website; and (4) shaping a long-term strategy for continuity, including international benchmarking and standardisation of data. These activities ensure a sustainable monitoring system that delivers actionable intelligence for the agri-food ecosystem.

##### 2.1.2 Main activities implemented (Year 1)

During the reporting period, WG1 worked on establishing the foundation for a strategic, evidence-based monitoring system for the Agrifood Pact for Skills Observatory. Key activities included defining the scope and objectives of monitoring and developing a strategic approach to gathering, analysing, and sharing labour market intelligence, primarily through the creation and consistent monitoring of key performance indicators (KPIs) in annual surveys. The WG ensured that monitoring covers both Pact member organisations and the broader European agrifood sector, enabling meaningful comparisons and supporting the Observatory's long-term mission. To achieve this, the WG compiled authoritative European and international data sources. A comprehensive list of KPIs was developed via desk research and a co-creation process involving Agrifood Pact for Skills members through an online survey, and agreed on a phased approach for KPI implementation, starting with direct indicators in the first year, with plans to expand to national-level data in future years. These KPIs included both publicly available indicators and those requiring primary data collection. The inaugural survey, distributed in November, collected member-specific data to establish a baseline for skills and training trends. This survey also included a prioritisation exercise for the KPIs that were developed in the desk analysis. Following this, the first annual survey will be launched in early 2026, targeting the Agri-food Pact for Skills signatories, incorporating feedback from the first survey and refined KPIs. This survey will further expand the data collected, allowing for deeper analysis of evolving skill needs, training gaps, and sectoral trends, while continuing to engage P4S members in co-creating a shared European knowledge base.

These activities collectively lay the groundwork for a sustainable, standardized, and evidence-driven monitoring framework that inform policy development, workforce planning, and skills development across the European agrifood sector.

##### 2.1.3 Key results and next steps

Key achievements include the formalisation of coordination with other working groups to avoid overlap, the development and review of a comprehensive list of KPIs through desk research and a collaborative co-creation process, and the implementation of an annual survey focused on member-specific data to reduce respondent burden and improve participation. The group also streamlined methodologies with WG2 (Skills Intelligence) to ensure complementary monitoring activities. Looking ahead, the immediate

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next step is to carry out the first annual survey and analyse the results. You can access the survey here: <https://www.surveymonkey.com/r/P4S-OAF-AnnualSurvey2025>

Continuous improvement is planned, with future surveys to include national-level data at fixed intervals, and ongoing feedback will be gathered to refine the monitoring and reporting framework.

### 2.2 WG2: Skills intelligence

#### 2.2.1 Objectives and scope

Working Group 2 (WG2) is dedicated to identifying skill needs within the agri-food sector, aiming to provide timely and actionable intelligence that supports education, training, and policy initiatives. The group operates in close collaboration with the Scenario and Policy Forum 2050 Working Group (WG6), ensuring its approach is both forward-looking and evidence based. Its scope encompasses mapping current and future skills requirements through surveys, focus groups, and scenario-based analyses, thereby aligning training provision with labour market demands.

It prioritises data collection and inclusive stakeholder engagement, ensuring that its activities reflect the diversity of the agri-food ecosystem. Regular consultations and participation in key events like Forum 2050 foster ongoing dialogue with internal and external experts, enhancing the relevance and quality of its deliverables. Furthermore, WG2 contributes its findings to the Agri-food Pact for Skills Observatory, integrating skills intelligence into annual reports and updating online resources to support the sector's long-term vision beyond the project's lifetime.

#### 2.2.2 Main activities implemented (Year 1)

##### 1. Agri-food ESCO Occupational Profiles Mapping

As an initial activity, WG2 mapped agri-food (including veterinary) occupational profiles using the ESCO database. This mapping establishes a common reference framework for future activities, including stakeholder consultation, gap analysis, and recommendations for updating or enhancing ESCO profiles.

**Summary Table: Number of Identified Occupational Profiles**

ESCO main category	Number of identified occupational profiles				
	Plant production	Animal production	Veterinary activities	Food industry	TOT
1.Managers	10	6	1	6	<b>23</b>
2. Professionals	24	6	14	7	<b>51</b>
3.Technicians and associate professionals	12	10	6	6	<b>34</b>
4.Clerical support workers			1		<b>1</b>
5.Service and sales workers		6	13	1	<b>20</b>

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6.Skilled agricultural, forestry and fishery workers	11	12			<b>23</b>
7.Craft and related trade workers	3			21	<b>24</b>
8.Plant and machine operators and assemblers	4				<b>4</b>
9.Elementary occupations	5	1		54	<b>60</b>
<b>TOT</b>	<b>69</b>	<b>41</b>	<b>35</b>	<b>95</b>	<b>240</b>

### 2. Organisation of Skill Needs Identification Activity

WG2 will organise a skill needs identification session during the AGRIFOODSKILLS project national focus groups across Europe (March–April 2026). An interactive online questionnaire (e.g., Mentimeter, Slido) will be designed and completed live, allowing respondents to view results in real time. The draft questionnaire will be prepared by ISEKI with input from WG members and consolidated at the project meeting in Turin (January 2026).

#### 2.2.3 Key results and next steps

The mapping of agri-food and veterinary occupational profiles helped create a reference framework, covering 240 profiles across categories such as managers, professionals, technicians, and skilled workers. This framework may support future stakeholder consultations, contribute to gap analyses, and inform potential updates to ESCO profiles.

Next steps include organising skill needs identification sessions during the AGRIFOODSKILLS national focus groups in March–April 2026, supported by an online questionnaire developed by WG members. Questionnaire results will be analysed and reported, with findings shared via infographics on the Agrifood Pact for Skills portal. The survey will become an annual campaign, with the questionnaire content updated regularly to reflect evolving sector needs.

### 2.3 WG3: Communication and Dissemination

#### 2.3.1 Objectives and scope

WG3 aims to strengthen the visibility and outreach of the Agri-food Pact for Skills Observatory and its flagship event, Forum 2050. Its objectives are to promote the Pact's mission, attract new members, and ensure that the outputs of all working groups are effectively communicated to stakeholders across the agri-food sector.

The scope of WG3 includes designing and implementing targeted communication campaigns and coordinating dissemination activities. This encompasses promoting the Pact and Forum 2050 through compelling content and sharing achievements and insights from all working groups via newsletters,

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website updates, social media, and other digital engagement strategies. All activities are aligned with EU priorities on skills development, sustainability, and innovation.

### 2.3.2 Main activities implemented (Year 1)

During its first year, WG3 focused on setting up its operational framework and carrying out key communication activities. After defining leadership roles, the group held meetings and bilateral exchanges to coordinate actions. These discussions led to decisions such as introducing a new poster format for the 2026 Pact for Skills annual meeting and planning ways to increase visibility for Forum 2050. WG3 also contributed to the Pact for Skills Steering Committee to support the Annual Survey and strengthen collaboration across the Pact community.

The group prioritised promoting the Pact for Skills and attracting new members through targeted communications. WG3 supported FDE in preparing the Pact leaflet, delivered presentations at the annual meeting and Forum 2050, and published social media posts and newsletter articles to highlight initiatives and updates. It also began collaborating with FDE to improve the Agrifood Pact website and newsletter, laying the groundwork for wider dissemination of other working groups' outputs in future reporting periods.

### 2.3.3 Next steps

The group will establish a clear strategy for dissemination among Pact for Skills members. This approach will ensure consistency, maximise outreach, and strengthen the impact of collaborative activities across the Pact community.

## 2.4 WG4: Roadmap Business Model and Long-term Action Plan

### 2.4.1 Objectives and scope

WG4 is dedicated to securing the long-term sustainability of the Agri-food Pact for Skills Observatory. Its core mission is to design a robust business model and strategic roadmap spanning 12 years, ensuring the Observatory's financial viability and operational autonomy. In the initial years, WG4 will research best practices from EU observatories to tailor a business model, identify diverse funding sources, and prepare strategies for public and private support. As the Observatory matures, WG4 will guide its transition to independence, first as a start-up piloting services and partnerships, then evolving into a fully autonomous, service-oriented entity with fee-based offerings.

WG4's approach is highly collaborative, engaging stakeholders such as EU institutions, education providers, trade unions, and businesses through workshops and consultations to co-design and validate services. The group defines a portfolio of value-added services—including market and skills intelligence, benchmarking, policy briefs, and advisory support—delivered via the Pact's website through open access and subscription models. WG4 also works closely with other working groups to ensure consistency and maximise impact, presenting strategic updates annually at the Forum 2050 event.

### 2.4.2 Main activities implemented (Year 1)

Working Group 4 (WG4) plays a pivotal role in ensuring the long-term sustainability of the Agri-food Pact for Skills Observatory. The group's main activities have focused on building a robust foundation for the Observatory's future, with a strategic approach spanning twelve years.

The principal activities implemented include:

- **Comparative Analysis of Observatories:** Conducted a thorough review of eight EU and three national observatories to identify best practices, governance structures, and operational models relevant to WG4's objectives. This analysis is included as **Annex 1** in the report.

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- **Business Model Development:** Researched and designed a tailored business model for the Observatory, including a Business Model Canvas and an implementation strategy to ensure financial viability and relevance.  
This work is included as **Annex 2** in the report.
- **Governance Analysis:** Analysed governance frameworks of other observatories' websites to define the most suitable governance structure for the AGRIFOODSKILLS Observatory.  
This analysis is included as **Annex 3** in the report.
- **Funding Opportunities Research:** Investigated diverse funding sources (EU, national, private, start-ups, agencies) to support the Observatory's development and ensure its financial autonomy from Year 5 onwards.  
This research is included as **Annex 4** in the report.

### 2.4.3 Key results and next steps

The key results achieved by WG4 include the delivery of a comprehensive 12-year strategic roadmap for the Agri-food Pact for Skills Observatory, providing a clear vision for phased development and long-term sustainability. The group developed a tailored business model and implementation strategy, mapped diverse funding pathways, and identified effective governance and operational models through comparative analysis of leading EU and national observatories, ensuring financial viability, stakeholder relevance, and autonomy from the fifth year. The visibility and engagement of the Observatory were strengthened through presentations at major events such as Forum 2050 and the Agrifood Pact for Skills Annual Event. Additionally, WG4 produced a suite of supporting materials to facilitate coordination and knowledge sharing.

#### Next Steps

- **Advance the Internal Plan:** benchmark competitiveness, refine institutional services, update the service catalogue, evaluate member satisfaction, and maintain the Pact for Skills portal.
- **Progress the External Plan:** develop market-driven services, implement service contracts, test pricing models, and monitor trends for specific commitments.
- **Strengthen collaboration with other working groups,** especially in skill intelligence, communication, and training repository alignment.
- **Continue reviewing progress,** updating strategies, and presenting outcomes at annual events such as Forum 2050.

## 2.5 WG5: Quality and certification

### 2.5.1 Objectives and scope

WG5 aims to establish a shared framework for quality assurance and certification practices within the Pact for Skills community, with a particular emphasis on micro-credentials in the agri-food sector. Its primary objective is to enhance transparency, credibility, and recognition of learning outcomes while respecting institutional autonomy and national diversity. By fostering voluntary cooperation and trust-based mechanisms, WG5 seeks to promote mobility and acceptance of micro-credentials across Europe without imposing binding requirements.

The scope of WG5 encompasses identifying and analysing relevant quality standards, validation processes, and certification models in collaboration with vocational education and other training providers. It draws on lessons learned from EU-funded projects and national accreditation systems, engages stakeholders through consultations, and ensures alignment with European policy frameworks.

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### 2.5.2 Main activities implemented (Year 1)

Throughout the second half of 2025, WG6 has been actively engaged in a series of ongoing activities aimed at advancing quality assurance and certification models for micro-credentials in the agri-food sector. The group is currently conducting a structured mapping and comparison of European and national frameworks, supported by the development of a shared comparative matrix to analyse governance, QA procedures, assessment, validation, certification, and recognition. Partners continue to collect and review case studies from the agri-food sector and related fields, identifying effective practices and challenges. Stakeholder engagement and policy alignment remain active, with consultations and policy mapping ongoing to ensure that project activities are closely aligned with EU, national, and regional strategies.

### 2.5.3 Key results and next steps

So far, the process of mapping national and European quality assurance systems and micro-credential frameworks is ongoing and is not yet complete. The next steps will be to continue the mapping work, expand the collection of case studies, further develop practical guidance for mutual recognition, and maintain engagement with stakeholders to ensure project activities remain relevant to sector needs and policy developments.

## 2.6 WG6: Scenarios and Policy FORUM 2050

### 2.6.1 Objectives and scope

WG6 serves as a strategic foresight and knowledge hub within the EU agri-food sector, dedicated to supporting long-term thinking, scenario development, and policy recommendations that address future skills and training needs. Its core activities include collecting and analysing forward-looking information on technological, market, social, and policy developments, thereby acting as a knowledge hub on emerging trends. The group also facilitates the exchange of best methodologies by promoting collaboration across all working groups and external partners, sharing tools and practices related to scenario development, skills forecasting, and policy design to strengthen the overall impact of the Observatory.

Additionally, WG6 supports skills intelligence by providing data-driven insights and strategic scenarios that help align labour market forecasts with education and training pathways. Through its flagship event, Forum 2050, the group organises high-level discussions and participatory workshops focused on long-term trends, sustainability transitions, labour market shifts, and digital and green transformations, aiming to inform both EU and national policy agendas. WG6 ensures broad visibility and engagement by presenting its analyses and recommendations at the annual Forum 2050 meeting and regularly contributes resources to the Pact for Skills platform, fostering transparency and supporting scenario-based planning across the sector.

### 2.6.2 Main activities implemented (Year 1)

#### **Future trends analysis and scenario development**

##### **Previous trend and scenario studies**

The trend and scenario studies from WG6 aim to support skill needs analysis trajectories and training design. Further, they may be used to stimulate and guide public debate, research and development and support policy making.

One of the tasks of the AGRIFOODSKILLS project (January to June 2025) was to make an update and revision of the agrifood scenarios as developed in the previous Erasmus+ projects FIELDS and I-

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RESTART. In the I-RESTART project, scenarios from the previous FIELDS project were further specified on the sustainability aspect. Therefore, in WG6 we take the broader FIELDS perspective as a starting point, while considering I-RESTART outcomes.

In the FIELDS project trends were specified for the four dimensions of the project. This was done together with an extensive analysis of the literature and sector and policy documents, for the agriculture, forestry and food industry. These steps led to the identification of main trends relevant to the FIELDS project. Table 1 gives an overview of identified trends in agriculture, forestry and the food industry grouped into the categories Sustainable production, Bioeconomy, Digitalisation, and Business models.

Table 1 Identified trends in agriculture, forestry and the food industry in Europe in the FIELDS project

Identified trends in Agriculture, Food industry and Forestry	
<b>Sustainability</b>	<p><b>Agriculture:</b> Integrated pest management, Integrated nutrient management, Agriculture pollution and GHG emissions, Organic farming and extensive production systems, Animal welfare, Scarcity of natural resources (land, nutrients), Pressure on water resources, Biodiversity and conservation of eco-systems, Food waste and loss,</p> <p><b>Forestry:</b> Large scale forest disturbances (droughts, heat waves, etc.), Impact of climate change on tree species and biomass characteristics, Biodiversity challenges, Illegal logging, Fragmentation of ownership, Health and safety challenges</p> <p><b>Food Industry:</b> Technologies to deal with food waste and loss, Circular production, Energy efficiency, Environmental footprint, Smart logistics systems, Clean and “green” label, Consumer diets</p>
<b>Bioeconomy</b>	<p><b>Agriculture:</b> Biomass production and transformation, Renewable energy, Biobased products, Resource-efficient technologies and reduction of losses, Circularity of production, Biodiversity</p> <p><b>Forestry:</b> Biomass production and transformation, Renewable energy, Biobased products and eco-system services, Increasing demands for wood, Urban green spaces/forests</p> <p><b>Food Industry:</b> Use of food waste, Circular production, Energy efficiency, Biomass transformation, Bio-based products, Bio-based packaging, new proteins</p>
<b>Digitalisation</b>	<p><b>Agriculture:</b> On-farm applications (combined technologies), Integrated FMIS, Big Data analysis and Agriculture 4.0, Traceability of produce, Supply Chain information systems, new customer relationships</p> <p><b>Forestry:</b> In-forest applications (combined technologies), Mechanised harvesting, Timber transport and traceability, Forestry management information systems</p> <p><b>Food Industry:</b> Food processing control, Food supply-chain monitoring, Factory design and industry 4.0, Robotics, Digital twins and augmented reality, 3D Printing/additive manufacturing, new technologies in processing and packaging,</p>
<b>Business Models</b>	<p><b>Agriculture:</b> Changes in farm structure, multi-functional farms, Urban farming and Indoor cultivation systems, Health and food consciousness of consumers, Traceability, Short food supply chains and Local/regional products,</p> <p><b>Forestry:</b> Economic importance of forests, Urban green spaces, Fragmented ownerships, Lack of forest entrepreneurship, Weak infrastructure and technology</p> <p><b>Food industry:</b> Complex consumer demands and new diets, Interaction with consumers, new logistics and e-commerce, short food supply chains, Novel foods, new packaging</p>

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Next, we identified three scenarios, with the following narratives (in keywords):

- 1 **Sustainable path scenario**, reflects environmental and SDG awareness, an active regionally oriented public sector, technology focusing on sustainable resource use, inclusiveness
- 2 **High-Tech path scenario**, reflects faith in technological development, a strong role for the private sector (MNCs), continuous innovation, accelerated Globalisation and free trade
- 3 **Established path scenario**, search for Global food chain efficiency, mixed public and corporate investments, concentrated agri-food sector, moderate technological development

Table 2 shows a summary of how these scenarios were elaborated for the four dimensions (sustainable production, bioeconomy, digitalisation and business models), and for the sectors Agriculture, Food industry and Forestry.

**Table 2** FIELDS scenario study - overview

Sustainable paths	Established paths	High tech paths
<b>Sustainable production</b> <ul style="list-style-type: none"> <li>▪sustainable plant-based consumption</li> <li>▪diversified cropping systems</li> <li>▪growing agro-forestry</li> <li>▪new proteins</li> </ul>	<b>Sustainable production</b> <ul style="list-style-type: none"> <li>▪cost, taste and convenience important for consumers</li> <li>▪Intensive agricultural production remains</li> <li>▪non sustainable management in scattered forests</li> <li>▪processing technology focuses on efficiency</li> </ul>	<b>Sustainable production</b> <ul style="list-style-type: none"> <li>▪healthy personalised diets</li> <li>▪technology intensive large scale production</li> <li>▪technology intensive commercial forestry</li> <li>▪Innovative products and processes in food industries</li> </ul>
<b>Bioeconomy</b> <ul style="list-style-type: none"> <li>▪decarbonised energy markets</li> <li>▪food waste and losses minimised</li> <li>▪sustainable multi-functional role forests</li> <li>▪strong biobased industry (plastics, chemicals, etc)</li> </ul>	<b>Bioeconomy</b> <ul style="list-style-type: none"> <li>▪fossil fuel based energy markets</li> <li>▪increasing pressure on natural resources (e.g. water)</li> <li>▪Sustainable forest management is limited</li> <li>▪Moderate but steady development biobased industry</li> </ul>	<b>Bioeconomy</b> <ul style="list-style-type: none"> <li>▪mix of fossil based and renewable energy</li> <li>▪new technologies reducing food waste and losses</li> <li>▪increasing forest commercialisation, pressure on biodiversity</li> <li>▪technology driven biobased industries</li> </ul>
<b>Digitalisation</b> <ul style="list-style-type: none"> <li>▪precision farming for small and medium scale sustainable and diverse production</li> <li>▪precision forestry for small and medium scale sustainable production</li> <li>▪industry 4.0 (incl. SMEs)</li> </ul>	<b>Digitalisation</b> <ul style="list-style-type: none"> <li>▪precision farming varies across sectors and regions. Focus on large scale farms</li> <li>▪precision forestry varies across regions. Focus on larger ownerships</li> <li>▪focus on safety and quality in international chains</li> </ul>	<b>Digitalisation</b> <ul style="list-style-type: none"> <li>▪precision farming for large scale production. Integration of systems across food supply chain.</li> <li>▪precision forestry for large scale commercial forestry</li> <li>▪industry 4.0</li> </ul>
<b>Business models</b> <ul style="list-style-type: none"> <li>▪decentralised markets and short chains</li> <li>▪agro-ecological intensification by small and medium size farms</li> <li>▪mixed multinationals and medium food industries focusing on sustainably produced food</li> <li>▪strong market for forest ecosystem services</li> </ul>	<b>Business models</b> <ul style="list-style-type: none"> <li>▪global markets and long chains combined with local-to-local production</li> <li>▪mix of corporate specialized farms and multifunctional family farms</li> <li>▪multinationals focusing on cost efficiency in global chains</li> <li>▪Larger forest owners integrate in wood chains</li> </ul>	<b>Business models</b> <ul style="list-style-type: none"> <li>▪global markets and long integrated chains</li> <li>▪large specialised corporate farms</li> <li>▪joint ventures food and health industry, for personalised and healthy food</li> <li>▪Large commercial forest business integrated in international wood chains</li> </ul>

### Working Group 6 trend and scenario studies

In Working Group 6 we build on the three scenarios as developed in the FIELDS and I-RESTART projects.

Three workshops were organised, on 13th and 27th of March and 14th of April. In the exercises public and private AGRIFOODSKILLS stakeholders, from the different sectors and with knowledge in the different subject-fields of our project were invited. Before the workshops, ample background information about the trend and scenario studies of the FIELDS and I-RESTART projects was shared with the participants. The workshops were recorded, transcribed, and summarized. In the first two workshops the focus was on latest trends and their impact on the agrifood scenarios that were developed in previous projects. In the third workshop the relations between scenarios and policy measurements were investigated. The three workshops were set-up as focus group discussions in a multi-step approach:

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every group discussion gives input to the subsequent group discussion, while there is overlap in participants of the different groups. The aim was to arrive at a degree of consensus among a larger group of stakeholders. (See annex 1 for the group compositions).

We distinguish between what we call developments exogenous to the agrifood sector (comparable with megatrends) and agrifood trends.

Some key exogenous developments discussed are displayed in table 3

**Table 3** Selection of major exogenous developments/(mega)trends as discussed in the workshops

- Protectionism and re-orientation of Global trade flows
- Supply dependencies for input materials, water and energy
- Lagging technology development and pace of innovation (in the EU)
- International specialized technological orientation
- Knowledge and technology dependencies and access restrictions
- Aging population (decreasing % active population)
- Limited availability of labour, land and natural resources
- Migration challenges
- Increasing climate change impacts and climate change awareness
- (Global) food security challenges

The first five trends in table 3 are related to the global position of the EU economy, in relation to geopolitical developments, trade disputes and protectionism. The five other trends are ongoing trends that were mentioned in the earlier trend studies as well. However, in the workshops these were stressed to have played a key role for the agrifood system in the last few years. Major agrifood trends of recent years are presented in table 4.

**Table 4** Selection of major agrifood trends as discussed in the workshops

- Increase of the use of digitalization, in the future AI in all business processes in the agri-food supply chain
- Fast developments in biotechnology, synthetic biology, genomics etc.
- New products: alternative protein sources (insects, algae, etc.), new foods, Phoods, etc.
- Developments towards sustainable business operations: use of renewable energy, ecological farming systems, biodiversity, circular production and management and valorisation of food waste and loss
- Changing consumer behaviour: awareness of food health aspects, dietary shifts, AI in consumer decisions, out-of-home eating (and cooking?)
- Supply chains: increasing agri-food supply chain dependencies, traceability and transparency requirements, concentration in all stages of the agri-food supply chain
- Increasing importance of soft skills for agrifood businesses
- Altering EU agri-food policies: technology development and innovation, regulations technology uptake

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Also, these trends were stressed as playing an important role in the agrifood system in the last few years. AI is to be considered a game changer for agrifood business management and innovation. Other technological developments also accelerate, in new product development as well as in food processing, which at the same time also moves towards more sustainable solutions. Consumer behaviour further develops with more attention to health aspects, personalized food, AI support for consumers in their buying decisions, and in some consumer segments a move towards more out of home eating. Global supply chains become even more important. An important development, already observed in the last decade, is the increasing importance of soft skills, expected to become even more important for farmers as well as for (sme) industries. Finally, the Draghi report stressed the importance of technology development and innovation for the European economy, as a precondition to be competitive in the future. This may also apply to the agrifood sector.

We reflected these trends against our scenarios:

### **Alterations/additions to FIELDS Scenario 1: Sustainable Paths scenario**

A policy focus on a sustainable and resilient agrifood sector with a satisfactory degree of self-sufficiency in key production areas. Development towards a well-coordinated European Union. Public services are regionally oriented - however coordinated by EU level institutions. We expect high *public-private* investments in sustainable technology & innovation, while the technology and knowledge orientation is European. Important to consider is that agrifood businesses follow EU based quality, safety and environmental standards. The EU's climate neutrality targets are pursued continuously.

### **Alterations/additions to FIELDS Scenario 2: High-Tech Paths scenario**

A policy focus on a globally competitive high-tech agrifood sector. Development to a well-coordinated European Union with diversified trade agreements. Public services are international business innovation oriented – coordinated by EU-level institutions. We expect high *private-public* investments in international competitive specialized businesses (MNCs), while the technology and knowledge orientation is global. Agrifood businesses follow global quality, safety and environmental standards. There is an overall belief in the possibility of effective management of ecological systems and climate change mitigation.

### **Alterations/additions to FIELDS Scenario 3: Established Paths scenario**

Varying and competing national policies and an overall focus on a cost-efficient national agrifood sector. A European Union weakened by internal conflicts. Agrifood businesses are integrated in international food chains governed by MNCs. Public services are national or regional oriented with no or low EU level coordination. Public and private investments are low to moderate, varying across countries. Technology and knowledge policies are dependent on global developments. Environmental awareness is low to moderate. Agrifood businesses follow global quality, safety and environmental standards.

### **Examples of differences between scenarios**

The three tables below present examples of differences in the three scenarios, on specific topics. Table 5 shows clear similarities to table 2 (FIELDS scenarios) however, with more attention to internationalization.

### **Table 5: Typical consumer and business features in the three scenarios**

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	S1. Building on Sustainable Paths scenario	S2. Building on High-tech Paths scenario	Building on Established Paths scenario
<b>Consumers</b>	-Consumers prefer healthy, personalized and sustainably, locally produced high quality foods	-Consumers prefer decently-priced high quality and innovative products from well-known brands	-Consumers prefer low-priced, easy to use, often highly processed products, private labels
<b>Farm production system</b>	-Diversified, often mixed livestock and crop production	-Intensive and specialized production	-Large-scale intensive production
<b>Farm business model</b>	-Family farm oriented, short chains, international chains	-Corporate specialized farms, global integrated chains	-Corporate farms, global commodity chains
<b>Food industry production system</b>	-High level of diversification (e.g., plant-based, allergen-free, locally sourced)	-Moderate-high level of diversification, including functional foods	-Low level of diversification tailored to local tastes and resource availability
<b>Food industry business model</b>	-SMEs (regionally oriented), MNC's and Producer owned Co-operatives	-In particular MNCs, start-ups, specialized bio-based industry, cross-sector industries	-Moderate developments food industry and biobased industry, differences between EU countries

In table 6 examples of topical issues in labour market, AKIS (Agricultural Knowledge and Innovation System) and examples of policies for the different scenarios are worked out.

As mentioned above, in the third workshop, the focus was on the relation between scenarios and policies. For the workshop an overview of an EU Legislative Framework on Agri-Food Policies was developed, including the Common Agricultural Policy and regulations on food safety and innovation. The significance of the new commission's vision for agriculture and food, which will guide future policy discussions, was underlined. In this regard also public-private partnerships and investments in enhancing food security and sustainability are an important point for discussion.

However, one conclusion of the discussion was that the creation of policy recommendations is highly complex, given the complexity of the agrifood ecosystem and interrelationships between different elements, but also the complexity and interrelatedness of legislative measurements in the legislative framework.

The study of the relation between scenarios and policy development should be further developed and is ongoing. As said, table 6 presents indications of policies of the different scenarios are given.

### Table 6: Typical labour market, AKIS and Policy features in the three scenarios

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	S1. Building on Sustainable Paths scenario	S2. Building on High-tech Paths scenario	S3. Building on Established Paths scenario
<b>Labour market</b>	-Green and Digital Skills Boom: Demand for workers with expertise in agroecology, circular economy, and digital farming tools	-Highly Specialized Workforce: Strong demand for engineers, data scientists, and biotech specialists in large agrifood corporations	-Labour Market Fragmentation: large differences in job quality and access to training across EU. Reliance on low-cost, migrant, labor
<b>AKIS</b>	-Multi-actor networks (farmers, researchers, advisors, NGOs, tech companies, veterinarians) deeply embedded in regional innovation ecosystems. -Bottom-up multi-stakeholder involvement and diversity of business models	-Knowledge flow is globalized, and European AKIS is highly connected to international research and innovation networks -Top-down corporate steering, multiple business models next to regionally focused schools	-Multinational corporations play a central role in knowledge and technology development, -Top-down steering of training programs, disjointed knowledge silos and large differences between countries/regions
<b>Policies</b>	-EU funding on public-private partnerships, collaborative programs, cohesion and inclusion, -Focus on Smes, family owned, and national based systems	-Deregulation helping free trade and international business potential in main regions -Promotion of global standards and private investments	-Increasing role of international organizations on managing conflicts -Protection of labour forces, trade unions increasing their local roles

Table 7 presents examples of typical differences in skill needs in the three scenarios. In this table examples of skills in the One-Health area are added, the One-Health perspective has become more prominent in the I-RESTART and AGRIFOODSKILLS projects.

**Table 7: Typical skill needs in the three scenarios (indicative, research is ongoing)**

	S1. Building on Sustainable Paths scenario	S2. Building on High-tech Paths scenario	S3. Building on Established Paths scenario
<b>Business operations</b>	-Skills for high-tech sustainably operating (sme) enterprises -Soft skills	-Skills for product and process innovations and technologies -STEP skills	-Skills for good agricultural practices and efficient management -Management skills
<b>Digitalisation</b>	-Skills for (sme) technology and digitalisation (incl. AI) appl. and multifunctional farm management	-Skills for AI application, E-commerce, SC Marketing and use of high-tech Cloud technology	-Skills for everyday use of digital (incl AI) technology and traceability
<b>Business models</b>	-Skills for (short) value chain management and direct marketing	-Skills for setting up (business) relationships in new Global value chains	-Skills for business management and efficient supply chain management
<b>One Health</b>	-Skills to improve animal welfare	-Skills for to apply telemedicine, AI, AR&VR	-Skills for to apply telemedicine, AI, AR&VR

### Lessons learned

An important lesson that we learn from our analysis is that scenarios are not set in stone but are intrinsically dynamic in structure/composition as well as in content. Important to recognize is that this holds for the overall scenarios as well as for the scenario elements. Therefore, the scenario studies can be used to discuss overall agrifood ecosystem developments, as well as specific elements of this ecosystem. For example, they can form the basis for the discussion on future skill and training needs.

### Priorities and tasks of WG6

On 24th of October 2025 WG6 organised a 4h workshop on structure and priorities of the Working Group 6. The main topics discussed focused on collaboration with other (Observatory-) WGs and on the activities of Policy Forum250.

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### Collaboration with other WGs

There are, obviously, strong collaboration opportunities between WG6 and WG2 (Skills Intelligence). On the one hand scenario studies (WG6) can support the identification of (future) skill needs and the design of occupational profiles in WG2. WG2 follows these recommendations. On the other hand, periodic outcomes of WG2 can support scenario updating processes.

However, also collaboration with other WGs is important. Scenario studies can be supportive for the periodical surveys into changing skill needs of the Monitoring WG (WG1). And these surveys can help validate developments towards certain scenarios.

Overall, a task of interest can be that WG6 regularly informs other WGs on the policy recommendations formulated by the Forum (e.g. through policy briefs from the Forum).

A key challenge for collaboration is that the (other) WGs have a different time horizon compared to the scenario study component of WG6 (short-midterm, 2030-2040, vs long term 2040-2050). A way to cope with this challenge is to build a framework with main scenario-drivers (digitalisation, sustainable production, various policies to be considered, etc.) and keep track of how these drivers change. Changes occur because of projected/expected developments but also due to unexpected developments (economic crises, scientific discoveries, geo-political crises, pandemics, etc.). Tracking changes in the drivers of scenarios can help to study and discuss in more detail the development towards these scenarios and what this means for skill needs, now and in the future.

### Policy Forum2050

Forum 2050 is part of Task 3.5 and WG6 – Scenarios & Policy Forum 2050 of the Observatory. It serves as a strategic platform for guiding the direction and allocation of resources of the working groups within the Observatory, providing essential feedback and proposals for its activities.

In the forum priority thematic areas are defined, with the aim of sharing Position Papers:

1) Corporate Culture & New Entrepreneurial Training, 2) Scenarios & Vision, 3) Lifestyles & Consumption, 4) Innovation Policies towards the 10th Framework Programme, 5) Food Alerts & Crisis Management, 6) Policy Game & Recommendations.

In 2025 two meetings have been organized, chaired by Professor Piero Mastroberardino:

- 23 / 24 January 2025 – Confagricoltura Headquarters – Rome
- 30 September 2025 – Hybrid – Confagricoltura Headquarters – Rome

In the January meeting, after the introduction of Forum 2050 to the partners, the focus was on the 6 position papers that had been written for the priority thematic areas. The papers were presented for all participants, subsequently discussed in 6 working groups, whereafter main themes to further work on were defined in a plenary session.

In the September meeting the updated position papers were presented and main developments in the thematic areas were discussed. Key points of attention were the strategic implications of these developments, the EU vision (presented by an EU Commission representative), and how to best use the findings from the position papers for the work of the Observatory working groups. Every working group presented its objectives, priorities and road map on the short term (2025-2026) and on the longer term.

At these and other meetings and workshops there are ongoing discussions on several topics.

- Important subjects are the role and position of the Forum, how the Forum should further develop, with which partners, how to reach out to potential (new) partners, how to relate to national and

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regional organisations, and how to reach a strong position in European agrifood debates. One specific topic in the current conversation is how to further enhance discussion and engagement at the Forum2050 meetings, e.g. by organising more sessions where partners interact.

- Forum2050 and Agri-food Pact for Skills are closely connected. National Agrifood Pact for Skills can provide organisations/stakeholders for the Pact for Skills and for Forum2050. An option in general can also be to focus on connecting to representatives of (national and regional) groups of organisations instead of to individual organisations.
- An important point brought forward in discussions is that a stronger contribution from science and technology is necessary. How this sector is evolving and what are current and potential R&D policies should play an important role in the scenario studies as well as in policy discussions.

Finally, in 2025 a WG6 survey on agrifood policies on skills was performed among AGRIFOODSKILLS participants. The aim was to get a first impression of how important stakeholders consider the role of policies in changing/developing the agrifood ecosystem. Policies are considered an important driver for the agrifood system, although self-regulation forces are also considered important. Policy interventions can focus on the system structure as well as on specific actors in the system, both with which was called “hard” (directive) and “soft” (consultative) forces. Policy tools are important in this regards, tools can be used in combination, or as alternatives, but can also reinforce each other. Most of the respondents find that measurement of the impact of policy tools is possible. Survey link:

<https://docs.google.com/document/d/1ICsYsN6GjK0XXaSG1DBKMymILDcf9Vlf/edit>

### 2.6.3 Next steps

- The further analysis and development of agrifood trends and scenarios is to be an ongoing process. The following method should be investigated: Describe how the agrifood ecosystem (may) evolve(s), through different time-intervals, towards different scenarios to strengthen our insight in the development of the agrifood ecosystem through time. Investigate implications for the definition of skill needs in different time intervals as well as for the definition of potential policy measurements.
- Further investigate with WG2 (Skills Intelligence) how scenarios can be used to predict long-term skill needs (e.g. for building educational systems, design education strategies)
- Although several collaboration opportunities between WG6 and the other WGs have been discussed, a further in-depth discussion and analysis of potential exchanges and collaborations in a WG workshop is advised.
- The study of the relation between scenarios and policy development should be further developed and is ongoing. The Policy Game, as used by Confagricoltura, can support this process
- A specific task of WG6 may be to inform other WGs, on a regular base, about policy recommendations by the Forum (e.g. through policy briefs from the Forum).
- Develop a further action plan for Forum2050, including topics like collaboration with and engagement of stakeholders, relationships with national and regional organisations, the Forum’s role in the agrifood debate, etc.
- The WG6 results will be presented at the upcoming AGRIFOODSKILLS Annual Event on 27-28 January 2026.

## 2.7 WG7: Micro-credentials learning design

### 2.7.1 Objectives and scope

WG7 aims to work on a proposal of a standardised EU-wide framework for micro-credentials in the agrifood sector, supporting flexible, recognised training pathways that foster upskilling, lifelong learning, and

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sector-responsive, high-quality opportunities. The framework will align with European standards such as EQF and ESCO, ensuring transparency, comparability, and recognition across member states. Its scope includes developing guiding principles and quality standards grounded in inclusivity, modularity, and interoperability with national systems. Key activities involve designing multilingual and culturally responsive content, implementing co-design processes with stakeholders, and piloting innovative approaches to ensure relevance and sustainability. WG7 collaborates with other working groups to maximise coherence and visibility, contribute insights to Forum 2050 and the Pact for Skills Observatory, and promote best practices through continuous engagement and dissemination.

### 2.7.2 Main activities implemented (Year 1)

During the first year, WG7 initiated its work to support the strategic development and adoption of micro-credentials in the agrifood sector. Key activities include conducting a comprehensive State of the Art (SoA) review on micro-credential design and preparing reports for dissemination, establishing an engagement strategy to connect stakeholders and align efforts across WGs, and promoting inclusivity and social fairness in micro-credential frameworks. The group also will work on ensuring alignment with EU policy drivers for diversity, equity, and inclusion (DEI), while building trust and demonstrating the value of micro-credentials through collaborative discussions and early awareness-raising initiatives.

### 2.7.3 Next steps

In the coming period, WG7 will continue building on the work already started. The group will engage further with stakeholders and refine the framework for designing micro-credentials. We will keep collaborating with relevant partners, explore practical ways to connect micro-credentials with existing qualification systems, and explore funding opportunities. These steps aim to support steady progress toward wider recognition and use of micro-credentials, while acknowledging that some challenges and adjustments may occur as the work moves forward.

## 2.8 WG8: Training content repository

### 2.8.1 Objectives and scope

WG8 main goal is to create and manage a central online platform where members of the Pact for Skills in the agri-food sector can easily find and share training materials, project results, and useful resources. This platform will be simple to use and will let people search for content that matches their needs, making learning more accessible for everyone, including those in rural or small-scale settings.

WG8 also will work on building skills and knowledge by supporting both members and outside partners with e-learning tools. The group will regularly update the Pact for Skills website with new materials and improvements and will present its progress and results at the annual Forum 2050 event. The aim is to make learning and sharing knowledge easier and more inclusive for the whole agri-food community.

### 2.8.2 Main activities implemented (Year 1)

During the first year, WG8 worked on the coordination of a knowledge-sharing system within the Pact for Skills network for the agri-food sector. Key efforts included defining the scope and objectives of the WG and initiating the development of a centralised digital repository and e-learning platform.

Parallel to these technical preparations, WG8 undertook stakeholder engagement and outreach activities. The group contacted coordinators of relevant EU-funded projects and external networks to source training materials and explore collaboration opportunities, although responses were limited during this period. Initial steps were also taken to strengthen partnerships with other WGs, particularly WG4, to align repository development with sustainability strategies.

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### 2.8.3 Next steps

Looking ahead, WG8 will intensify and diversify stakeholder engagement by renewing outreach efforts to additional project coordinators and external networks, aiming to accelerate the collection of training materials for the repository. Structured content collection from Pact for Skills members will be initiated, supported by internal meetings to further refine the repository's scope and structure. Collaboration with other WGs will be strengthened through scheduled cross-WG meetings to ensure alignment with long-term sustainability strategies. As training materials become available, the group will implement open science and licensing procedures, preparing selected resources for publication on Zenodo and ensuring compliance with Creative Commons guidelines. These steps will help establish the repository as a dynamic, accessible hub for ongoing learning and cooperation within the agri-food sector.

## 3. Conclusion notes and recommendations

The work carried out across the Observatory Working Groups highlights a shared understanding of the rapid transformation facing the agri-food sector and the urgent need for coordinated skills intelligence and action.

To facilitate rapid understanding, this summary highlights the main achievements and emerging themes from each Working Group, enabling readers to grasp the Observatory's overall direction and priorities without needing to review every chapter in detail.

### **WG1: Monitoring**

WG1 established a framework for collecting and analysing labour market intelligence in the agri-food sector. Key achievements include the development of harmonised KPIs, the launch of the first annual member survey, and the creation of sustainable monitoring practices. These efforts ensure that evidence-based insights will inform policy and workforce strategies across Europe.

### **WG2: Skills Intelligence**

WG2 mapped 240 occupational profiles and initiated activities to identify current and future skill needs. Through surveys and focus groups, the group will align training provision with labour market demands and supporting the sector's long-term vision. The annual skills survey and stakeholder engagement are central to this ongoing work.

### **WG3: Communication and Dissemination**

WG3 focused on enhancing the visibility and outreach of the Observatory and its flagship event, Forum 2050. By implementing targeted communication campaigns and supporting the dissemination of WG outputs, WG3 is strengthening stakeholder engagement and attracting new members to the Pact for Skills community.

### **WG4: Roadmap, Business Model and Long-Term Action Plan**

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WG4 delivered a comprehensive 12-year strategic roadmap and developed a tailored business model to ensure the Observatory's financial sustainability and operational autonomy. The group's comparative analysis of EU and national observatories, along with its funding research, provides a solid foundation for long-term success.

### **WG5: Quality and Certification**

WG5 is developing a shared framework for quality assurance and certification, with a focus on micro-credentials. The group's mapping of European and national systems, stakeholder consultations, and policy alignment activities are paving the way for greater transparency and recognition of learning outcomes across the agri-food sector.

### **WG6: Scenarios and Policy Forum 2050**

WG6 acts as a strategic foresight hub, updating scenario studies and facilitating policy discussions on future skills and training needs. Through workshops and the Policy Forum 2050, WG6 is fostering collaboration, scenario-based planning, and the integration of long-term perspectives into the Observatory's work.

### **WG7: Micro-Credentials Learning Design**

WG7 is working towards an EU-wide framework for micro-credentials, supporting flexible and recognised training pathways. The group's focus on inclusivity, stakeholder engagement, and alignment with European standards aims to help drive the adoption and recognition of micro-credentials in the sector.

### **WG8: Training Content Repository**

WG8 is building a central online platform for sharing training materials and resources. By coordinating content collection and strengthening partnerships, WG8 aims to make learning more accessible and inclusive for all members of the Pact for Skills.

## **3.1 Lessons Learned**

The first year of the Agrifood Pact for Skills Observatory demonstrated the importance of establishing a clear governance structure and fostering strong collaboration among diverse stakeholders. Early investment in operational frameworks and participatory processes proved essential for aligning objectives and ensuring transparency. The phased approach adopted by the Working Groups allowed flexibility and responsiveness to emerging needs, while co-creation activities, such as KPI development, highlighted the value of engaging Pact members from the outset. Another key lesson is that cross-WG coordination is critical to avoid duplication and maximise synergies, particularly between monitoring, skills intelligence, and foresight activities.

## **3.2 Recommendations**

Looking ahead, the Observatory should prioritise consolidating its knowledge base and strengthening stakeholder engagement through regular surveys, interactive consultations, and open-access resources. Greater emphasis on digital tools and collaborative platforms will enhance data collection and dissemination, supporting evidence-based decision-making. It is recommended to maintain iterative feedback loops across WGs to ensure coherence and adaptability, while accelerating efforts to develop sustainable business models and funding strategies. Finally, fostering stronger links between scenario analysis and skills intelligence will help anticipate future needs and guide policy recommendations, ensuring the Observatory remains a dynamic and forward-looking resource for the European agrifood sector.

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### 4. ANEXXES

#### 4.1 ANNEX 1: EU and National Observatories

##### A COMPARATIVE ANALYSIS

##### 11 Case Studies

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**Table 1: EU Observatories' Denominations & Starting Dates**

EU Agri-Food Chain Observatory (AFCO)	2024
EU Soil Observatory (EUSO)	2020
European Observatoire of Sport and Employment (EOSE)	2002
European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)	2009
European Observatory on Health Systems and Policies	1998
European Higher Education Sector Observatory (EHESO)	2024
EU Observatory on Deforestation and Forest Degradation	2023
FutureFoodS - Food Systems Observatory	2024

**Table 2: National Observatories' Denominations & Starting Dates**

Osservatorio Permanente sui Giovani e l'Alcool (OPGA)	1991 - 2023
Tromsø Geophysical Observatory (TGO)	1928 (in 2000: reorganization and assumption of the current name - TGO)
Food Sustainability Observatory	2017

**Table 3: EU Observatories' Missions**

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EU Agri-Food Chain Observatory (AFCO)	To provide insights into how the agri-food supply chain functions, with a focus on bringing increased transparency on prices, structure of costs and distribution of margins and added value.
EU Soil Observatory (EUSO)	To be the principal provider of reference data and knowledge at EU-level for all matters relating to soil, in order to support EU soil policies.
European Observatoire of Sport and Employment (EOSE)	Skills & Workforce development in the sport sector across Europe.
European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)	Consolidated database of aggregated and harmonized data and a large network of experts in fisheries and aquaculture.
European Observatory on Health Systems and Policies	To identify what health systems and policies evidence Europe's decision makers need.
European Higher Education Sector Observatory (EHESO)	To combine the best of the current EU data tools and capacities in one single place, while further enhancing their use and relevance for policy makers, universities, students and researchers.
EU Observatory on Deforestation and Forest Degradation	To monitor changes in the world's forest cover and related drivers.
FutureFoodS - Food Systems Observatory	To support the sustainable transformation of European food systems through monitoring, evaluation and policy decision support based on sound scientific evidence.

**Table 4: National Observatories' Missions**

Osservatorio Permanente sui Giovani e l'Alcool (OPGA)	The enhancement of a multidisciplinary culture on alcohol, inspired by the principles of bio-psycho-social alcology. The Observatory operated with its skills and expertise in research and public communication in order to promote and foster the dissemination of a scientifically based and reliable alcological culture on alcoholic beverages and to increase knowledge on all alcohol-related subjects from an integrated perspective, called bio-psycho-social. The Observatory favored an anti-prohibitionist and harm minimization approach.
Tromsø Geophysical Observatory (TGO)	Conducting long-term geophysical observations, focusing on: <ul style="list-style-type: none"> <li>• Magnetometry: monitoring the geomagnetic field through a network of stations distributed from southern Norway to Svalbard.</li> <li>• Ionosphere: study of the Earth's ionosphere using a shortwave radar (ionosonde) located at Ramfjordmoen, near Tromsø.</li> <li>• Space and space weather: management of the Norwegian Center for Space Weather (NOSWE), which provides operational alerts on space weather events that could affect technology and society.</li> </ul>

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Food Sustainability Observatory	To contribute to the sustainable transformation of the agri-food system through empirical scientific research and dissemination activities, focusing on the role of innovation. It aims to support agri-food companies in moving from isolated product and technological innovations to systemic innovations in business models and processes, creating shared value along the supply chain and in society.
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**Table 5: EU Observatories' Fundings**

EU Agri-Food Chain Observatory (AFCO)	Primarily funded by the European Commission. The observatory is closely linked to the European Commission's policies on agriculture, food, and food security.
EU Soil Observatory (EUSO)	Funded by the European Commission, through programs like Horizon Europe and other initiatives related to environmental sustainability and soil management. It may also receive support from scientific and environmental organizations.
European Observatoire of Sport and Employment (EOSE)	Funded by EU funds, particularly through the Erasmus+ program and other initiatives aimed at developing the sports sector and employment in Europe. It may also receive support from national public funds.
European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)	Primarily funded by the European Commission through the European Maritime and Fisheries Fund (EMFF) and other policies focused on sustainable fisheries and aquaculture.
European Observatory on Health Systems and Policies	Receives funding from the European Commission and programs related to health and well-being, such as Horizon Europe and the Health Programme. It may also receive contributions from national bodies and international health organizations.
European Higher Education Sector Observatory (EHESO)	Primarily funded by the European Commission, through the Erasmus+ program for higher education, research, and student mobility. It also receives support from other education and research-related policies and funds.
EU Observatory on Deforestation and Forest Degradation	Primarily funded by the European Commission through programs related to environmental protection and sustainable forest management, such as Horizon Europe and other initiatives for sustainable natural resource management.
FutureFoodS - Food Systems Observatory	This observatory is funded by Horizon Europe and other European initiatives and funds focused on research and innovation in sustainable food systems and the green and digital transitions. Additionally, it may receive contributions from private foundations and international organizations focusing on sustainable food.

**Table 6: National Observatories' Fundings**

Osservatorio Permanente sui Giovani e l'Alcool (OPGA)	Fully privately funded by AssoBirra – The Italian Brewers and Maltsters Association. This Observatory has also received public grants at both National and European levels, through competitive tender procedures.
Tromsø Geophysical Observatory (TGO)	TGO is part of the Arctic University of Norway (UiT) and is funded as a university research unit. It is also involved in the Nordic Observatory

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	Collaboration (NOC), receiving support through institutional cooperation across Nordic countries (e.g. Norway, Finland, Sweden). Funding comes mainly from public research institutions and university resources.
Food Sustainability Observatory	<p>The Observatory is funded by multiple partners, including:</p> <ul style="list-style-type: none"> <li>• Corporate Sponsors: Illycaffè, Unitec Group, Fratelli Beretta, Mondelez, Number 1 Logistics Group, MBS Consulting.</li> <li>• Partners: Fondazione Banco Alimentare Onlus, Assolombarda Confindustria Milano, Monza, Confagricoltura, Brianza e Lodi, Associazione Italiana Food &amp; Beverage Manager.</li> </ul>

**Table 7: EU Observatories' Governance & Structures**

EU Agri-Food Chain Observatory (AFCO)	<ul style="list-style-type: none"> <li>• Members: National authorities; Organizations representing stakeholder; Observers.</li> <li>• Other Contributors: sub-groups; invited experts.</li> <li>• Chair and Consultation / Secretarial Services: DGAGRI.</li> </ul>
EU Soil Observatory (EUSO)	<ul style="list-style-type: none"> <li>• Established and operated by: the JRC within Directorate D "Sustainable Resources".</li> <li>• Steering Committee: it will be chaired by the Director of JRC.D. and composed of representatives of the main Commission Services with relevant to soil policy.</li> <li>• Secretariat (will support the Steering Committee).</li> </ul>
European Observatoire of Sport and Employment (EOSE)	<p>37 member organisations – 4 members of the secretariat - 50 partner organisations - 4 members of staff – 6 executive board members.</p> <p>Full members are made up of:</p> <ul style="list-style-type: none"> <li>• National Expert Organisations: Independent and not-for-profit organisations.</li> <li>• International / European Organisations.</li> <li>• Individuals: Recognised experts in the areas and willing to act as national point of contact.</li> </ul>
European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)	<ul style="list-style-type: none"> <li>• Initiative of EU Commission - Directorate-General for Maritime Affairs and Fisheries (DG MARE).</li> <li>• International team of fisheries and aquaculture experts and analysts.</li> <li>• EUMOFA Team.</li> <li>• The Editing Committee: European Commission policy officers and representatives of the EUMOFA team.</li> </ul> <p>Under the supervision of DG MARE, EUMOFA services are managed by a group of companies led by COGEA (Italy), in partnership with:</p> <ul style="list-style-type: none"> <li>• AND (France)</li> <li>• EUROFISH (Denmark),</li> <li>• KONTALI ANALYSE (Norway),</li> <li>• Business Integration Partners (Italy).</li> </ul>
European Observatory on Health Systems and Policies	<ul style="list-style-type: none"> <li>• EU Countries</li> <li>• Non-EU Countries: <ul style="list-style-type: none"> <li>- Canada</li> </ul> </li> </ul>

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	<ul style="list-style-type: none"> <li>- United States of America</li> <li>- United Kingdom</li> </ul> <p>Partnership hosted by the WHO Regional Office for Europe with OECD and European Commissions, which includes:</p> <ul style="list-style-type: none"> <li>● Governments,</li> <li>● Health insurance bodies,</li> <li>● and International Organizations.</li> </ul>
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**Table 8: National Observatories' Governance & Structures**

European Higher Education Sector Observatory (EHESO)	<ul style="list-style-type: none"> <li>● The European Education and Culture Executive Agency (EACEA) signed a service contract to develop the EHESO.</li> <li>● The consortium implementing the activities of the service contract is coordinated by PPMI, in Lithuania, and it also includes: <ul style="list-style-type: none"> <li>- the Centre for Higher Education (CHE) in Germany,</li> <li>- the Centre for Higher Education Policy Studies (CHEPS) at the University of Twente in the Netherlands,</li> <li>- the Austrian Institute of Technology (AIT) and</li> <li>- Joanneum Research in Austria.</li> </ul> </li> </ul> <p>Supported by the Nordic Institute for Studies and Innovation, Research and Education (NIFU) in Norway &amp; the Centre for Science and Technology studies (CWTS) from Leiden University in the Netherlands, as well as a number of individual members.</p>
EU Observatory on Deforestation and Forest Degradation	<ul style="list-style-type: none"> <li>● Managed by the European Commission's Joint Research Centre (JRC).</li> </ul> <p>The Observatory collaborates with various stakeholders, including:</p> <ul style="list-style-type: none"> <li>● All 27 EU Members States</li> <li>● Non-EU countries: Notable partner countries include: Brazil; Colombia; Australia; Côte d'Ivoire; Ghana; and Cameroon.</li> <li>● Trade and business associations</li> <li>● NGOs: Fern; Fair Trade Advocacy Office (FTAO); Client Earth; Rainforest Alliance, Solidaridad, Tropenbos International, and IUCN Netherlands.</li> <li>● International organizations: FAO; Forest Stewardship Council (FSC); European Forest Institute (EFI).</li> </ul>
FutureFoodS - Food Systems Observatory	<ul style="list-style-type: none"> <li>● Governing Board (GB): The central decision-making body, responsible for the overall strategic direction of the partnership. It includes representatives from the European Commission, particularly the Directorate General for Research and Innovation (DG-RTD).</li> <li>● Management Board (MB): Manages day-to-day operations and ensures effective communication among consortium members. Supports the organization of meetings and distribution of information among all levels of governance.</li> <li>● EU Food Systems Executive Board (FSEB): Focuses on implementing and monitoring defined actions according to established work plans, executing research and innovation</li> </ul>

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	<p>activities, and establishing an interface between science and policy.</p> <ul style="list-style-type: none"> <li>• Steering Committee (SteerComm): Focuses on aligning partnership activities with national priorities and ensures that actions taken do not conflict with national food systems programs.</li> <li>• Call Board (CB): Is the decision-making body for all aspects of practical implementation and follow-up of joint transnational calls. It is supported by the Call Office (CO).</li> <li>• Ethical, Regulatory, and Deontology Advisory Board (ERDB): An independent body that ensures adherence to ethical standards, regulatory compliance, and deontological principles.</li> <li>• Scientific &amp; Stakeholder Advisory Board (SSAB): Composed of experts from various fields, it provides scientific guidance.</li> </ul>
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**Table 9: EU Observatories' Priorities (pt.1)**

EU Agri-Food Chain Observatory (AFCO)	<ul style="list-style-type: none"> <li>• Measures to safeguard food security and support EU farmers;</li> <li>• Ensuring availability and affordability of fertiliser;</li> <li>• European Food Security Crisis preparedness and response mechanism (EFSCM).</li> </ul>
EU Soil Observatory (EUSO)	<ul style="list-style-type: none"> <li>• Soil monitoring elements of the Horizon Europe Mission 'A Soil Deal for Europe' (Mission Soil) and its annual work programme;</li> <li>• Citizen engagement and awareness raising actions by promoting the European Green Deal aspirations on soil to society;</li> <li>• Interact and collaborate with relevant EU Agencies and international organisations.</li> </ul>
European Observatoire of Sport and Employment (EOSE)	<ul style="list-style-type: none"> <li>• Research and analysis;</li> <li>• Project development and management;</li> <li>• EU policies and new initiatives;</li> <li>• Technical expertise in identifying and meeting skill needs;</li> <li>• Workforce development planning;</li> <li>• Sport and education systems;</li> </ul>
European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)	<ul style="list-style-type: none"> <li>• Increase the coverage of the supply chain and the number of countries involved in the data collection system;</li> <li>• Improve dissemination tools, providing market perspectives;</li> <li>• Analyze the international context and trade flows.</li> </ul>

**Table 10: EU Observatories' Priorities (pt.2)**

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European Observatory on Health Systems and Policies	<ul style="list-style-type: none"> <li>• Country monitoring: providing analytic and evaluative descriptions of country health systems and systematically monitoring developments;</li> <li>• Analysis: exploring how health systems 'work' and policy briefs on key and emerging challenges;</li> <li>• Performance assessment: supporting the development and interpretation of indicators for practical policy use and to help improve performance;</li> <li>• Knowledge brokering: making Observatory evidence visible and useful to its target audiences in a range of formats.</li> </ul>
European Higher Education Sector Observatory (EHESO)	<ul style="list-style-type: none"> <li>• Strengthening the European dimension in higher education and research;</li> <li>• Supporting universities as lighthouses of our European way of life;</li> <li>• Empowering universities as actors of change in the twin green and digital transitions;</li> <li>• Reinforcing universities as drivers of the EU's global role and leadership.</li> </ul>
EU Observatory on Deforestation and Forest Degradation	<ul style="list-style-type: none"> <li>• Global Forest Mapping and Monitoring;</li> <li>• Production and Trade of Commodities;</li> <li>• Global Land Use Carbon Fluxes;</li> <li>• EU Tools for Forest Monitoring.</li> </ul>
FutureFoodS - Food Systems Observatory	<ul style="list-style-type: none"> <li>• Changing the way we eat: Promoting sustainable and healthy food environments; addressing malnutrition; encouraging balanced and culturally acceptable diets.</li> <li>• Changing the way we process and supply food: Orient food production and distribution toward carbon neutrality and circularity, reducing waste and improving resource efficiency.</li> <li>• Changing the way we connect to food systems: Strengthening citizen engagement and consumer trust in sustainable food systems through inclusion and active participation.</li> <li>• Changing the way we govern food systems: Improving the governance of food systems by addressing fragmentation and promoting integrated and inclusive policies.</li> </ul>

**Table 11: National Observatories' Priorities (pt.1)**

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<p>Osservatorio Permanente sui Giovani e l'Alcool (OPGA)</p>	<p>OPGA was an Independent Association financed by:</p> <ul style="list-style-type: none"> <li>- AssoBirra - The Italian Brewers and Maltsters Association;</li> <li>- Università degli studi di Perugia;</li> <li>- Fondazione Unipol.</li> </ul> <p>These partners were represented in:</p> <ul style="list-style-type: none"> <li>- General Assembly;</li> <li>- Executive Board;</li> <li>- Chaired by:</li> <li>- President of the Association</li> <li>- Vice-President and the</li> <li>- Secretary General: in charge of the ordinary management of the Association.</li> </ul> <p>Scientific inspiration of the Observatory was expressed by a Scientific Laboratory, whose composition (approx. 20 people) was made by experts in different disciplinary fields:</p> <ul style="list-style-type: none"> <li>- Anthropology;</li> <li>- Social and Medical Epidemiology;</li> <li>- Public Health Statistics;</li> <li>- Sociology;</li> <li>- Psychiatry;</li> </ul> <p>The initiative of the Observatory has the approval of an Ethical Committee. A Communication Office was in charge of communication and dissemination activities of the Observatory, including the organization of Events and Conferences.</p> <p>The association also conducted relations with Italian and foreign scientific and institutional entities, collaborated with other scientific societies, participated in the national alcoholic debate with its own original perspective, and communicated to the public.</p>
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**Table 12: National Observatories' Priorities (pt.1)**

<p>Tromsø Geophysical Observatory (TGO)</p>	<p>The TGO is an independent research unit within the Faculty of Science and Technology at Tromsø Arctic University (UiT). It is headed by the Scientific Director Magnar Gullikstad Johnsen, with a team of researchers and engineers specializing in space physics, electrical engineering and data management.</p>
<p>Food Sustainability Observatory</p>	<p>The Observatory is led by a team of principal investigators and researchers from the Politecnico di Milano School of Management:</p> <ul style="list-style-type: none"> <li>● Principal Investigators: Raffaella Cagliano, Federico Caniato, Paola Garrone, Marco Melacini, Alessandro Perego.</li> <li>● Research Team: Giulia Bartezzaghi, Federica Ciccullo, Claudia Colicchia, Mattia Iannantuoni, Annalaura Silvestro, Andra Riandita.</li> </ul> <p>The Observatory operates within a neutral and pre-competitive network, bringing together academics, companies, startups, non-profit organizations, and policymakers.</p>

**Table 13: EU Observatories' Roadmaps – Action Plans (pt.1)**

## A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills

<p>EU Agri-Food Chain Observatory (AFCO)</p>	<p>Contingency plan roadmap: the Commission conducted an analysis which formed the basis for a staff working document that was published and other supporting documents, including the Decision and Synopsis. The aim is to inform citizens and stakeholders about the Commission's work in order to allow them to provide feedback and to participate effectively in future consultation activities.</p> <p>Roadmap organization:</p> <ul style="list-style-type: none"> <li>● A: Context → Problem the initiative aims to tackle / Basis for EU intervention (legal basis and subsidiarity check).</li> <li>● B: What does the initiative aim to achieve and how.</li> <li>● C (Better regulation): Consultation of citizens and stakeholders → Evidence base and data collection.</li> </ul> <p>Consultation process:</p> <ul style="list-style-type: none"> <li>● Stakeholder consultation</li> <li>● Expert Group for Agricultural Markets meetings</li> </ul> <p>Tools - Actions:</p> <ul style="list-style-type: none"> <li>● Commission's sectoral Market Observatories</li> <li>● Dashboards (monitoring; alerts; qualitative assessment)</li> </ul>
<p>EU Soil Observatory (EUSO)</p>	<ul style="list-style-type: none"> <li>● European Soil Data Centre (ESDAC)</li> <li>● EU-Wide Soil Monitoring System</li> <li>● EUSO Soil Health Dashboard</li> <li>● EUSO Stakeholder Forum (+ Annual hybrid workshop AND European Mission Soil Week)</li> <li>● Technical Working Groups</li> <li>● EU4Soils portal</li> </ul>

**Table 14: EU Observatories' Roadmaps – Action Plans (pt.2)**

<p>EU Soil Observatory (EUSO)</p>	<ul style="list-style-type: none"> <li>● European Soil Data Centre (ESDAC)</li> <li>● EU-Wide Soil Monitoring System</li> <li>● EUSO Soil Health Dashboard</li> <li>● EUSO Stakeholder Forum (+ Annual hybrid workshop AND European Mission Soil Week)</li> <li>● Technical Working Groups</li> <li>● EU4Soils portal</li> </ul>
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### A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills

<p>European Observatoire of Sport and Employment (EOSE)</p>	<ul style="list-style-type: none"> <li>• Creation of an online resource that will guide organizations and individuals, supported by good practice guidance and case studies;</li> <li>• A selection of national colleagues in Member States to become national Employment Innovation Experts, who will serve as points of contact in their own countries;</li> <li>• Lifelong Learning Strategy for Sport and Physical Activity (7 Step Model);</li> <li>• EOSE has developed a co-ordinated response in order to respond to the education and training challenges of the sector and ensure that the sector delivers its potential;</li> <li>• EOSE collaborates with its network of members and partners through ambitious transnational initiatives and projects to analyse the European and national sport labour markets, and to promote and support the modernisation of education systems and the development of a competent paid and unpaid workforce that is essential to the success of the sector.</li> </ul>
<p>European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)</p>	<ul style="list-style-type: none"> <li>• The EU Market Overview (structural information and analyses of the whole European fisheries and aquaculture industry, at EU and Member State level) presented through dedicated "profiles" (country - species);</li> <li>• Data: the EUMOFA database is accessible by supply chain stage, through simple and advanced tables, and through the bulk download facility. Data are available on weekly, monthly and yearly bases;</li> <li>• Studies and Reports (Monthly Highlights; the EU Fish Market; case studies on Price structure analysis; thematic analyses).</li> </ul>

**Table 15: EU Observatories' Roadmaps – Action Plans (pt.3)**

<p>European Observatory on Health Systems and Policies</p>	<p>Programmes:</p> <ul style="list-style-type: none"> <li>• Health and economy (Topics: Making the Economic Case for Health; Economics of Healthy and Active Ageing; PASH Simulator; MOVE Simulator; Ageing in the Western Pacific; Financial Crisis).</li> <li>• Governance (Topics: Inter-Sectorality; Civil Society; Centralization/Decentralization; European Integration and Mobility; TAPIC; Health Systems Governance; Tallinn Conference 2023).</li> <li>• Integration (Topics: Implementation; Skill mix/workforce; Patient Centredness)</li> <li>• Innovation (Topics: Organizational Innovation; Technology; Antimicrobial Resistance).</li> <li>• Performance (Topics: HSPA Studies; Quality of Care; Efficiency).</li> </ul>
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European Higher Education Sector Observatory (EHESO)	<ul style="list-style-type: none"> <li>• Benchmarking Tool for Higher Education Institutions for selecting the best places for studying, in synergy with other platforms.</li> <li>• Analysis of data on students and graduates from EHESO statistical institutional data, institutional and student surveys, EUROGRADUATE, EUROSTUDENT and other sources.</li> <li>• European Student Observatory (by 2026): a Tool to inform students about the diversity of university profiles and study programmes.</li> <li>• Microdata Access: an Open Access Data Centre that allows users to download all relevant EHESO microdata and information at different levels of aggregation: country, institution and institution type.</li> <li>• Strategic Transformation Toolbox: It contains various tools and resources to facilitate their participation in strategic transformations of the European higher education sector.</li> </ul>
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**Table 16: EU Observatories' Roadmaps – Action Plans (pt.4)**

EU Observatory on Deforestation and Forest Degradation	<ul style="list-style-type: none"> <li>• The EU observatory on deforestation and forest degradation will support the EU's new rules laid down in the Regulation on deforestation-free products (EUDR).</li> <li>• The Forest Information System for Europe (FISE) will be enhanced to become the cornerstone for harmonised forest data in Europe.</li> <li>• The EU Observatory should participate in the development of an early warning system combining research and monitoring capacity. It provides continuous monitoring and early notification of possible deforestation or forest degradation activities.</li> </ul>
FutureFoodS - Food Systems Observatory	<p>The Food Systems Observatory roadmap within the FutureFoodS partnership is outlined in its SRIA, which guides research and innovation activities for the transformation of European food systems. Series of strategic actions for the next 7-10 years, divided into core and cross-cutting activities:</p> <ul style="list-style-type: none"> <li>• Co-funding and joint calls: 6 joint calls for research and innovation projects (first by the end of 2024). The calls will cover topics such as: <ul style="list-style-type: none"> <li>- Transition to sustainable and resilient food systems.</li> <li>- Innovations in novel foods.</li> <li>- Promotion of sustainable food choices.</li> </ul> </li> <li>• Food Systems Observatory: Creation of an observatory to monitor progress in the transition to sustainable food systems.</li> <li>• Living Labs Hubs: Development of interactive, real-world environments where diverse stakeholders collaborate to co-create innovative solutions.</li> <li>• Knowledge Sharing: Organizing knowledge sharing events to strengthen and expand the food systems community. Also, organization of SRIA update activities and EU and global mapping and benchmarking to ensure inclusion of all food system stakeholders.</li> <li>• Continuous SRIA update: Periodic review of the SRIA involving all stakeholders to ensure an inclusive and participatory approach.</li> </ul>

**Table 17: National Observatories' Roadmaps – Action Plans**

## A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills

<p>Osservatorio Permanente sui Giovani e l'Alcool (OPGA)</p>	<p>OPGA operated with annual and multi-year planning was structured around four operational pillars:</p> <ul style="list-style-type: none"> <li>- Research (scientific reports and articles);</li> <li>- Communication (publications and media);</li> <li>- Alcohol Policy (and campaigns);</li> <li>- Training/Education (Schools, Health Professionals, Journalists).</li> </ul>
<p>Tromsø Geophysical Observatory (TGO)</p>	<ul style="list-style-type: none"> <li>● Long-Term Geophysical Monitoring: TGO maintains extensive, long-term datasets on Earth's magnetic field and the ionosphere. These measurements are crucial for understanding space weather phenomena and their impact on technology and society. The observatory operates 18 magnetometer stations across Norway and Svalbard, some of which have been active since the early 20th century.</li> <li>● Space Weather Services: TGO hosts the Norwegian Centre for Space Weather (NOSWE), which provides operational alerts and forecasts related to space weather events that can affect satellite communications, navigation systems, and power grids.</li> <li>● International Collaboration: TGO is a founding member of the Nordic Observatory Collaboration (NOC), established in 2018 to enhance coordination among geomagnetic and atmospheric observatories in the Nordic region. This collaboration focuses on harmonizing data collection and sharing best practices.</li> <li>● Research Infrastructure: The observatory operates several field stations, including Ramfjordmoen, Adventdalen in Svalbard, and Skibotn, supporting both its own research and guest instruments from various scientific projects.</li> </ul>
<p>Food Sustainability Observatory</p>	<p>While a detailed roadmap is not publicly available, the Observatory's activities include:</p> <ul style="list-style-type: none"> <li>● Research Courses: Conducting empirical research through surveys, interviews, and case studies.</li> <li>● Workshops and Seminars: Organizing interactive workshops and seminars with partners, sponsors, and other stakeholders.</li> <li>● Public Conferences: Hosting public conferences to disseminate research results.</li> <li>● Publications: Publishing reports, articles, and online content to share findings and best practices.</li> <li>● Educational Activities: Offering webinars and MOOCs to increase awareness and disseminate research results.</li> </ul>

### Observatories' General Conclusions

To date, Confagricoltura has conducted a comparative analysis of EU and National Observatories to identify the main features and to gain a comprehensive understanding of their structure and functioning.

This study has been conducted for the WP1 – The Observatory and Long-Term Action Plan, led by CONFAGRI, which aims to establish the Observatory of the Agrifood Pact for Skills, focusing on governance, structure, and operational mechanisms.

The term Observatory includes very different organizational modes and objectives. This analysis focused on key aspects such as the date of establishment, mission, funding, governance and organizational structure, strategic priorities, and corresponding roadmaps and action plans.

This study covered eight European Observatories and three at the National level, with the aim of examining both the European and National dimensions and obtaining a broader perspective on their operational models.

### EU Observatories' Conclusions: Summary of Findings (pt.1)

## A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills

The establishment of the Observatories spans from the late 1990s to as recently as 2024.

Regarding the mission of the Observatories, activities such as data collection/creation of a harmonized database and its sharing; sector monitoring; and the evaluation of applied policies and policy decision support appear to largely prevail over other areas of focus, such as pricing and cost structures, as well as sector-specific skills and workforce issues.

Regarding funding, the European Commission is the main source of support for all these observatories, primarily through various programs and thematic funds such as Horizon Europe, Erasmus+, the European Maritime and Fisheries Fund (EMFF), and other sector-specific initiatives. Some observatories may also receive funding from national authorities or international organisations, depending on specific needs and collaborations.

Concerning the governance and organizational structure of the Observatories, a light structure but structured governance model, with vertical governance seems to be favored: Board, Executive director, Scientific & Advisory Committee, Stakeholder Committees, and Representatives from the European Commission. Many Observatories share a multi-level governance structure, including Central operational units or technical secretariats; Thematic or technical working groups; Stakeholder forums or advisory committees; National experts or country-level focal points. A common feature is a decentralized and collaborative governance focused on transparency and inclusivity.

### EU Observatories' Conclusions: Summary of Findings (pt.2)

To conclude, about the Observatories' roadmaps and action plan, below is a summary organized by key shared themes:

Strategic roadmaps or SRIAs with ongoing revision: almost all observatories operate under some form of Strategic roadmap or agenda, which defines clear medium- to long-term objectives (e.g., FutureFoodS SRIA, AFCCO Contingency Plan); Phased implementation actions, and in some cases, ongoing participatory review processes (e.g., FutureFoodS, Health Systems). A common feature is the dynamic and updatable roadmaps aligned with broader EU programs (e.g., Horizon Europe, sectoral regulations).

Broad stakeholder consultation and engagement: many observatories promote structured stakeholder consultations, including: Active involvement of citizens, universities, businesses, and civil society (e.g., AFCCO, EUSO, EHESO, FutureFoodS); Tools such as annual forums, participatory labs, surveys, and public consultations. A common feature is the emphasis on engaging multiple stakeholders at both EU and national levels.

Integration of digital tools and data platforms: all Observatories rely on advanced digital tools for monitoring and analysis: Dashboards, data portals, and information systems (e.g., EUSO, EHESO, EUMOFA, Deforestation Observatory, FutureFoodS); Open access to microdata and harmonized datasets (e.g., EHESO, EUMOFA); Early warning or forecasting systems (e.g., Deforestation, Health Observatory). A common feature is the use of digital tools and transparency through open data access.

### EU Observatories' Conclusions: Summary of Findings (pt.3)

- Inter-institutional and cross-border cooperation: most observatories operate through collaborative networks, including: Cooperation with EU agencies, European Commission DGs, international organizations, and expert networks (e.g., EUSO, EOSE, Health Systems, FutureFoodS); Joint initiatives and projects (e.g., EOSE, FutureFoodS). A common feature is network-based governance that integrates both EU and national levels.
- Operational actions: implementation of pilot actions, projects, and operational tools: Each observatory implements concrete actions, such as: Pilot projects (e.g., Living Labs –

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FutureFoodS); Benchmarking systems (e.g., EHESO); Simulation tools (e.g., Health Systems); Good practices and operational toolkits (e.g., EOSE, EHESO). A common feature is the deployment of practical and applicable tools to facilitate the implementation of strategies.

- As for the Observatories' strategic priorities, the following seem to be recurring: Data monitoring & analytics; Policy support & evidence-based governance; Strategic research & foresight; Institutional collaboration & stakeholder engagement; Citizen participation & communication; Skills development & capacity building; Sustainability, resilience, and climate alignment.

### National Observatories' Conclusions: Summary of Findings (pt.1)

The establishment of these Observatories The three observatories were established across a broad time span, ranging from the late 1920s to the 2010s.

Regarding the mission of the Observatories, despite the diversity of their subject areas—ranging from public health and social behavior to geophysical phenomena, to sustainable food systems - all three Observatories are united by a commitment to:

- Advancing scientific research;
- Integrating multidisciplinary approaches and perspectives;
- Translating research into actionable insights for societal benefit;
- Dissemination of knowledge to inform practice, policy, or public understanding.

Regarding funding, regarding funding, the main source of support for all these observatories comes from a combination of institutional, public, or private sector contributions. While the specific balance varies, they all rely on multi-source funding models that reflect their collaborative nature and the need to sustain long-term research. Each observatory engages with stakeholders beyond academia—such as governments, private companies, and nonprofit organizations—indicating a shared emphasis on applied research and societal relevance.

### National Observatories' Conclusions: Summary of Findings (pt.2)

Concerning the governance and organizational structure of the Observatories, concerning the governance and organizational structure of the Observatories, they all operate within a framework that combines scientific leadership with multi-stakeholder collaboration. Each Observatory is guided by a core scientific or academic team responsible for research direction and oversight, while also engaging external actors—such as universities, companies, public institutions, and experts from various disciplines—to support governance, strategic alignment, and outreach activities. This shared model allows them to remain scientifically rigorous while maintaining relevance to broader societal, institutional, or industry contexts triggering a real-world impact.

As for the Observatories' strategic priorities, all three Observatories share a strong focus on generating knowledge that addresses complex societal or environmental challenges. Whether it's promoting responsible alcohol consumption among youth, monitoring geophysical and atmospheric conditions, or driving innovation in sustainable food systems, they each aim to translate scientific research into practical impact. Moreover, they all emphasize prevention, long-term monitoring, and the promotion of informed decision-making—highlighting their commitment to sustainability, public well-being, and collaborative progress.

### National Observatories' Conclusions: Summary of Findings (pt.3)

To conclude, about the Observatories' roadmaps and action plan, the three Observatories, while operating in distinct domains, all adopt structured, multi-dimensional approaches to guide their activities over time. Each of them combines long-term strategic planning with flexible, action-oriented programming. Their operational models are built around recurring cycles of research, dissemination,

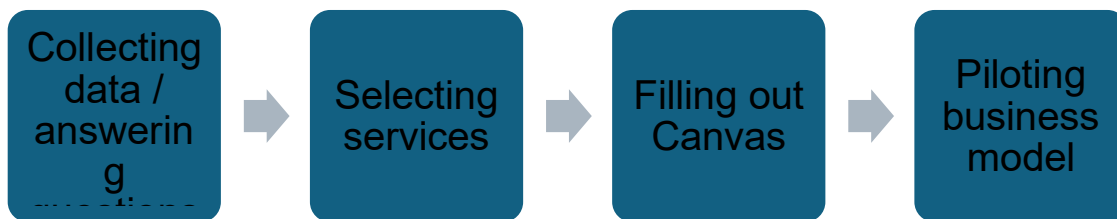
### **A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills**

and stakeholder engagement, ensuring that scientific output is consistently translated into practical outcomes. While formal roadmaps may not always be publicly detailed, their consistent use of tools such as annual planning, long-term data monitoring, educational initiatives, and collaborative events demonstrates a shared commitment to impact-driven research. Ultimately, their action plans are dynamic in nature, evolving in response to emerging societal needs, technological developments, and the broader policy context in which they operate.

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### 4.2 ANNEX 2 Running the Observatory – business models

Building a successful business model requires more than just a great idea—it demands a structured approach. To start, you need a clear understanding of your value proposition and the problem you aim to solve. Identifying your target market and analysing competitors helps you position your offering effectively. Additionally, defining revenue streams, cost structures, and key resources ensures financial sustainability. Finally, integrating these elements into a coherent framework allows you to transform concepts into actionable strategies. One way to collect thoughts and systematically approach this huge question ahead, Canvas business model can help organize all ideas and information needed for building a business model.



Canvas for building a business model consists of 9 boxes namely the followings:

- **Customer Segments**  
Defines the different groups of people or organizations the business aims to serve
- **Value Propositions**  
Describes the bundle of products and services that create value for specific customer segments
- **Channels**  
Explains how the company communicates with and delivers value to its customers
- **Customer Relationships**  
Outlines the types of relationships a company establishes with specific customer segments
- **Revenue Streams**  
Represents the cash a company generates from each customer segment
- **Key Resources**  
Lists the most important assets required to make the business model work
- **Key Activities**  
Describes the most important actions a company must take to operate successfully
- **Key Partnerships**  
Identifies the network of suppliers and partners that help the business function
- **Cost Structure**  
Summarizes all costs incurred to operate the business model.

The Canvas can be filled out several times with modifications and after each box is filled, business models can be selected. There are several tips for designing a Canvas, for example it is useful to collect handy questions for guiding the listing for the 9 points.

#### Customer Segments:

- Who are your most important customers?
- What are their key characteristics (demographics, behaviours, needs, other traits)?
- Are there defined segments between customers?
- Which problems are you solving for each segment?
- How do these segments differ from each other?

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- Which segment generates the most revenue or strategic value for the company?

### Value Propositions

- What unique value do you deliver to your customers?
- Which customer problems are you solving and how?
- What benefits do customers gain from your product/service?
- How does your offering differ from competitors?
- What makes your solution indispensable or hard to replace?

### Channels

- What are the channels to communicate?
- Through which channels do customers want to be reached?
- How do you currently deliver your value proposition?
- Which channels are most cost-effective?
- How do channels integrate with customer routines?
- How do you raise awareness, enable purchase, and provide support?
- Which channels are most expensive and require the most work?

### Customer Relationships

- What type of relationship does each customer segment expect?
- How do you currently interact with customers?
- Are relationships automated, personal, or self-service?
- How do you maintain customer loyalty?
- How do relationships impact your cost structure?
- Are there any latent need or tendencies showing?

### Revenue Streams

- What value are customers willing to pay for?
- How do customers prefer to pay (subscription, one-time, etc.)?
- What is the pricing strategy (fixed, dynamic)?
- Which revenue stream is most profitable?
- Are there opportunities for upselling or cross-selling?

### Key Resources

- What physical, intellectual, human, or financial resources are essential?
- Which resources are critical for delivering your value proposition?
- What resources do you need for distribution channels?
- Which resources are required for customer relationships?
- Which resources are most expensive?

### Key Activities

- What activities are crucial for delivering your value proposition?
- Which activities are needed for distribution and sales?
- What activities maintain customer relationships?
- Which activities generate revenue streams?
- What activities differentiate you from competitors?

### Key Partnerships

- Who are your key partners and suppliers?
- Which resources do you acquire from partners?
- Which activities do partners perform?
- Why do you need partnerships (risk reduction, optimization)?
- How do partnerships impact your cost structure?

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### Cost Structure

- What are the most significant costs in your business model?
- Which resources and activities are most expensive?
- Are costs fixed, variable, or both?
- How do economies of scale or scope affect costs?
- How does your cost structure align with your revenue streams?

There are probably some questions that are cannot be solved by simple desktop research. Based on the questions ahead, there a few research need to be done among identified stakeholders such as a market analysis, purchase and customer habit research, legislation research and financial research as well.

### 1. Market Research

**Industry trends:** What is happening in your sector? Growth rates, emerging technologies, regulations.

**Market size & growth potential:** How big is the opportunity? Is it expanding or shrinking?

**Customer needs & pain points:** What problems are customers trying to solve?

**Competitor analysis:** Who are the main players? What are their strengths and weaknesses?

**Pricing benchmarks:** What do customers currently pay for similar solutions?

### 2. Customer Research

**Segmentation:** Who are your ideal customers (demographics, behaviors)?

**Buying habits:** How do they purchase? Online, offline, subscription?

**Decision drivers:** What factors influence their choice (price, quality, convenience)?

**Customer feedback:** What do they say about existing solutions?

**Willingness to pay:** How much value do they place on solving the problem?

### 3. Regulatory & Legal Research

**Industry regulations:** Are there compliance requirements?

**Licensing or certifications:** Do you need any approvals?

**Data protection laws:** Especially if handling customer data.

**Tax implications:** For your business model and pricing.

### 4. Operational & Resource Research

**Key resources availability:** Talent, technology, suppliers.

**Cost structure benchmarks:** Typical costs in your industry.

**Supply chain risks:** Reliability and scalability.

**Technology trends:** Tools or platforms that can reduce costs or improve efficiency.

### 5. Financial Research

**Revenue models:** Subscription, freemium, pay-per-use, etc.

**Funding options:** Grants, investors, loans.

**Break-even analysis:** How long until profitability?

**Pricing elasticity:** How sensitive is demanded to price changes?

Combining all information as a next step it is crucial to consider based on the findings, what services and products can a company provide and on what financial basis. On previous desktop research the followings were found to be suitable for the Observatory based on other Observatories' services and similar institutions.

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**Data commerce:** Data is more valuable nowadays than money. Since the Observatory would be dedicated to monitor and observe the industry and its trends, data collection can be one of the services. This would allow more complex other services as well, such as consultation.

**Teaching services and learning materials provider:** Since our mission is to create learning materials and services, regularly or occasionally we can provide teaching services. From an other point of view, teaching materials can be sold through different platforms, or can be available in exchange for some kind of fee. Not only the materials ready can be a subject to this but also workshops and events of similar kinds can be organized in the same way.

**Publication:** Based on the data and the teaching services, the gained knowledge and experience could be published as a scientific paper into many platforms. There are several websites offering access to many kinds of papers online, prices are usually low but monthly paying options or access fee for only one publication.

**Consultation services:** Hopefully on the long run, many stakeholders (companies, resource institutions) would trust the work the Observatory does, this would allow consultation services for different kinds of issues.

Based on these services the following business model is recommended. Please note that many sites recommend mixed business models and not using exact ones, that allows some flexibility. Since there are many possibilities, a co-creation workshop would be great to continue. Here is a recommendation for running the Observatory based on the current knowledge as a Canvas.

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### Business Model Canvas

Establish the basics of the Observatory



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### 4.3 ANNEX 3: Business model review for the operation of the observatories

#### Business models recommended:

Step by step to build a model:

1. Market potential analysis
2. Identify customer needs, buying habits
3. Search for possible models
4. Take into consideration that combined models are way more effective
5. Competitiveness analysis: know the strengths and weaknesses of the company
6. Financial situation and financial analysis: can the model fit the budget plan in the long run

<https://emeritus.org/blog/business-management-how-to-choose-the-right-business-model/>

EU observatories are usually funded by EU tenders, and allocated funds, often participated countries contribute.

Example: [https://www.obs.coe.int/en/web/observatoire/financial-resources-and-output#{%2250510033%22:\[\]}\]](https://www.obs.coe.int/en/web/observatoire/financial-resources-and-output#{%2250510033%22:[]}])

#### Some possible business models for the Observatory as a servicing faculty with illustration of the models with everyday examples\*:

- Open source: mostly recommended to software, the basic service is free and available for everyone, can be freely traded, but the extras need to be purchased (\*Linux)
- Razor and Blades: the basic service is quite cheap, but the additional services (which are essentials) quite expensive and must be bought regularly (\*Nespresso capsules)
- Reverse Razor and Blades: the basic service is cheap/affordable for everyone, but limited to the point where it decreases the customer's satisfaction, so the customer needs to buy the extension services (which can be buy only at the company) (\*Ambi Pur)
- Freemium/Premium: there is a free demo version of the service, which is limited, therefore extended services are needed for the usage of the whole package (\*Spotify premium)
- Subscription: regularly paid amount of money from the customer for the service (\*Netflix)
- Fee-for-service: an additional fee needs to be paid for a service; the service needs to be very specific and outstanding in the market for success (training courses, microlearning...)
- B2B subscription: similarly to the subscription model, but the customers are companies
- Sponsoring: the seller sponsors for fees at websites/events/trainings, the additional customers need to fit the company's image
- Nonprofit/ foundation: the budget comes from fundings and tenders (in this case probably EU ones)
- Public finance: ensures that individuals pay regularly (similar to donations), the company can offer a small service for it (monthly newspaper e.g.)
- Grant-based: the government and private investors pay the fees of operating the company (can be open access)
- Start-up accelerator: the founding comes from supporting start-ups and receiving contributing money after the success
- Industry partnership: founding partnerships with similarly profiled companies (in this case, be one's company's research base)

Used links:

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- <https://innovationdesign.hu/business-design/10-uzleti-modell-10-percben/>
- <https://www.investopedia.com/terms/b/businessmodel.asp>
- <https://innovation-entrepreneurship.springeropen.com/articles/10.1186/s13731-022-00251-2>
- <https://vbn.aau.dk/en/publications/innovation-and-business-models>
- <https://guidingcounsel.com/evaluating-partnership-models-for-business-success/>
- <https://www.kiflo.com/blog/types-of-strategic-partnerships>
- <https://northsearegion.eu/media/21111/new-business-models-for-skills.pdf>
- <https://www.lmsportals.com/post/building-a-scalable-training-business-model-key-considerations-for-startups>

### Pro and contra for some business models:

<https://www.aha.io/roadmapping/guide/product-strategy/what-are-some-examples-of-a-business-model>

<https://fastercapital.com/topics/the-pros-and-cons-of-each-type-of-business-model.html>

### Some tools for building:

<https://blog.invgate.com/business-model-canvas>

<https://fifthchrome.com/top-business-model-strategy-ma/>

[https://bmtoolbox.net/patterns/?\\_gl=1\\*8fkhzt\\*\\_up\\*MQ.\\*\\_ga\\*NjM5MTE1NTEwLjE3NTAyMjk0NDU.\\*\\_ga\\_VRRXHH7S2L\\*czE3NTAyMjk0NDUkbzEkZzAkDE3NTAyMjk0NDUkajYwJGwwJGgw](https://bmtoolbox.net/patterns/?_gl=1*8fkhzt*_up*MQ.*_ga*NjM5MTE1NTEwLjE3NTAyMjk0NDU.*_ga_VRRXHH7S2L*czE3NTAyMjk0NDUkbzEkZzAkDE3NTAyMjk0NDUkajYwJGwwJGgw)

### Additional links for promising business models, initially:

Open-source model:

- <https://insights.blossomcap.com/successful-open-source-business-models-2709e831e38a>
- <https://dl.acm.org/doi/abs/10.1145/1330311.1330321>

Razor and blades model:

- <https://www.sciencedirect.com/science/article/abs/pii/S0007681316000124>
- <https://heinonline.org/HOL/LandingPage?handle=hein.journals/uclr78&div=15&id=&page=>
- <https://www.investopedia.com/terms/r/razor-razorblademodel.asp>

Reverse Razor and Blades:

- <https://learningloop.io/plays/business-model/reversed-bait-and-hook>

Premium-premium model:

- <https://billingplatform.com/blog/freemium-pros-cons>
- <https://www.emerald.com/insight/content/doi/10.1108/intr-03-2014-0064/full/html>
- <https://www.sciencedirect.com/science/article/abs/pii/S0306457321000248> (this is for a consulting service)
- <https://core.ac.uk/download/pdf/30834165.pdf>

Subscription model:

- <https://www.emerald.com/insight/content/doi/10.1108/jstp-02-2023-0054/full/html>
- [https://en.wikipedia.org/wiki/Subscription\\_business\\_model](https://en.wikipedia.org/wiki/Subscription_business_model)

Fee-for-service model:

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- <https://www.4lenses.org/setypology/ffs/>
- <https://www.emerald.com/insight/content/doi/10.1108/josm-04-2013-0103/full/html>

B2B model:

- <https://www.ecwid.com/hu/blog/what-is-b2b.html?q=%2Fhu%2Fblog%2Fwhat-is-b2b.html>
- <https://europepmc.org/article/med/11183982> (this is for a hub)

Public finance model:

- <https://www.investopedia.com/terms/c/crowdfunding.asp>
- <https://www.tandfonline.com/doi/full/10.1080/00472778.2019.1661682>

Some grouping:

- Used for research center like facilities: Grant-based, subscription, open access, industry partnership, public funding, start-up accelerator
- Used for education and training: subscription, freemium/premium, grant-based, fee-for-service

### More about the industry partnerships (AI searched):

The **Industry Partnership Model** is a business approach where organizations collaborate with industry players to drive innovation, share resources, and achieve mutual benefits. Here are some key aspects:

- **Strategic Alliances: Companies form partnerships to leverage complementary strengths without merging ownership. This helps in market expansion and technological development.**
- Joint Ventures: Two or more firms create a new entity to pursue shared business goals, pooling expertise, and financial resources.
- **Technology Partnerships: Businesses collaborate on research and development to create innovative solutions, often seen in sectors like pharmaceuticals and tech.**
- Reseller or Distribution Partnerships: One company sells or distributes another's products, expanding market reach.
- Franchising: A business licenses its brand and operations to partners, allowing for rapid expansion while maintaining control over standards.

Each model has its advantages depending on the industry and objectives. You can explore more details [here](#) or check out different strategic partnership types [here](#).

Links for the AI search:

<https://www.kiflo.com/blog/types-of-strategic-partnerships>

<https://guidingcounsel.com/evaluating-partnership-models-for-business-success/>

In the following section, there are services that we collected from different websites as revenue-generating tools for ensuring financial stability. These can be used as channels as well during the building process. The compatible business models under them are more likely suggestions and ideas rather than facts.

### Some recommended services and enclosed business models:

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- **Data commerce:** since this Observatory's main goal is to gain data and provide information about the observed reality, entering the data market is crucial. Data is more valuable nowadays than money. We should sell data previously collected to consumers (including research facilities and companies). Data management and statistical approaches could be another service provided by the Observatory in a cheaper form, securing a plus income.
- Compatible business models: freemium/premium, subscription, fee for service, B2B,
- **Publication fees:** so many people on the data market wouldn't need that much information about a specific topic. The Observatory can write scientific publications and journal articles about observed trends. In exchange, monthly or yearly access should be provided for single publications for a single fee.
- Compatible business models: subscription, fee for service, B2B
- **Learning and teaching services:** We can cooperate in making study materials by handling the collected information, since it's up to date. We can also make short videos about specific topics for supporting teaching facilities or hold workshops and courses online and offline as well.
- Compatible business models: fee-for service, B2B,
- **Consulting services:** by collecting information, our team should consult with companies and educational institutions about what needs to be done to develop functional and cost-efficient teaching and learning in both cases.
- Compatible business models: nonprofit, B2B, fee for service, razor and blades (for regular services)
- **Start-up managing** that's a bit pricy but helping innovative start-ups selected to our observed problems in the Agri industry, we can support different but related start-up companies or ideas and ask for share in advance.
- Compatible business models: start-up accelerator, nonprofit, grant based, razor and blades, reverse razor and blades
- **Holding events:** as previously mentioned, workshops and courses could be held, but as an observing system, we can demonstrate our knowledge in different kinds of meetings and events, as experts.
- Compatible business models: B2B, grant based, fee for service
- **Tools:** some other observatories offer different kinds of tools on their websites, such as business calculators, predictions, AI helping systems etc. With the data, there is room for something like this in our case too.
- Compatible business models: freemium/premium, subscription, fee-for-service, open source (for developing softwares)
- **Donation button:** Smaller observatories gain donations via websites to secure long-term functioning parallel to the EU fundings. Small amounts go a long way.
- Compatible business models: public funding, nonprofit
- **Recommending services:** we can advertise companies on different issues on the website and during consultations, education etc. It can be a regular income if it's done well.
- Compatible business models: fee for service, subscription, nonprofit, razor and blades
- **Collaborating with other organizations:** when a business is more like a research station, collaboration could be necessary for regular income. An observatory can work as a research facility under several companies or organizations by providing data, knowledge, and training for funding bodies.

There is no uniform business model for EU observatories; almost all of them function differently. The above-mentioned services often occur via official websites and ideas for enhancing financial stability.

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Used observatory links:

<https://www.eose.org/eose-expertise/>

<https://eumofa.eu/about-us>

<https://eurohealthobservatory.who.int/>

<https://forest-observatory.ec.europa.eu/>

<https://www.futurefoodspartnership.eu/funding-opportunities>

<https://www.tgo.uit.no/about/about.html>

<https://www.eoslhe.eu/who-we-are/>

<https://climate-adapt.eea.europa.eu/en/observatory/About>

<https://www.euipo.europa.eu/en/about-us/observatory>

[https://www.clustercollaboration.eu/funding?f%5B0%5D=status%3A1\\_open](https://www.clustercollaboration.eu/funding?f%5B0%5D=status%3A1_open)

Observatory-like facilities:

<https://merlin.obs.coe.int/>

<https://www.ie.edu/observatory-finances-households-smes/>

<https://membership.ceps.eu/>

[Who we are | Corporate Europe Observatory](#)

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### The Canvas tool to build a business model:

Canvas is a widely known builder template for business models consisting of 6 steps:

1. Market potential analysis
2. Identify customer needs, buying habits
3. Search for possible models
4. Take into consideration that combined models are way more effective
5. Competitiveness analysis: know the strengths and weaknesses of the company
6. Financial situation and financial analysis: can the model fit the budget plan in the long run

Can be downloaded here:

<https://www.strategyzer.com/library/the-business-model-canvas>

Useful videos/sources understanding the use of canvas:

<https://www.youtube.com/watch?v=Snau1uizuW0>

#### The 20 Minute Business Plan: Business Model Canvas Made Easy

It helps to summarize all the key aspects in templates, such as channels, partnership, finances, and main aims to help to choose the right model. After understanding the main focuses, this tool helps to visualize the collected aspects. The gathered information helps to guide building the model. The canvas is usually a beginner step in the whole process (1.-2. points above). The services we gathered can also provide guidance filling the boxes, like tools/channels for example.

After filling out each block, one should create a detailed document (well known as the business model itself). The blocks should provide a structure for the document. During the writing process the document can be extended if needed with other aspects. It is possible to use an already existing model/model mix that fits well with the canvas or can be totally unique. The models mentioned above can help guide writing down our model, but usually 2-3 model types are used nowadays in business plans. This is 3.-5. step in building the model.

Usually, when this document is ready, companies test its effectiveness by running it for a while, to see how it fits the business itself. Many times (since it is more like an approach at first) the model lack important points. Whenever someone notices a gap or missing part, the canvas itself should be revised. For example, in market analysis no one noticed that a major age group is a huge part of the consumers and the marketing is not targeting them, the created canvas should be completed in the proper boxes (consumers: that generation we noticed, channel: they use Instagram, we can reach them via it, tool: short videos are liked in this age group, etc.). Building a model is an iterative process. (6. step)

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### 4.4 ANNEX 4 Funding opportunities

#### Funding Opportunities for the Long-Term Sustainability of the Agrifood Skills Observatory

The long-term sustainability of the Agrifood Skills Observatory relies on its capacity to access European funding streams that support digital infrastructures, knowledge ecosystems, multi-stakeholder cooperation, innovation services, and cross-border data governance. After the end of AGRIFOODSKILLS (GA 101183898), the Observatory is expected to continue operating through new project proposals, participation in European initiatives, and integration into broader EU data and knowledge ecosystems.

This document maps funding programs that can support Observatory's long-term sustainability, autonomy and operational continuity. The analysis focuses on funding streams directly relevant to the Observatory's governance, data ecosystem, digital infrastructure, research and innovation capacity, and cross-border cooperation.

In alignment with WP1 – Task 1.3, the objective is to identify mechanisms capable of maintaining and expanding the Observatory beyond the lifetime of the AGRIFOODSKILLS project. As required by the Long-Term Action Plan, these mechanisms must provide the “sources of funding to ensure continuity, exploitation and maintenance of results”, ensuring that the Observatory remains active over time and that its outputs continue to evolve, scale, and remain usable for stakeholders.

While European-level instruments remain the primary source of long-term support, national funding programs can also contribute to the Observatory's sustainability. Examples from Italy and Belgium are included, as these national schemes often finance complementary activities - such as digital infrastructures, data governance, skills development, territorial pilots, and innovation ecosystems - that align with the Observatory's mission and strengthen its capacity to operate across institutional and geographical contexts.

The Observatory will target the following funding streams:

#### EU Funding Opportunities

EU Programme / Initiative	Short Description	Relevance for the Observatory	Type (Call / Framework)	Official Link
<b>Horizon Europe – Cluster 6 / Sustainable Food Systems Partnership</b>	EU Framework Programme for research and innovation, supporting sustainability, food systems, digitalisation, and multi-actor innovation models.	Ideal for supporting research, monitoring methodologies, strategic foresight, data-driven platforms, and long-term knowledge production of the	Competitive calls	<a href="https://research-and-innovation.ec.europa.eu">https://research-and-innovation.ec.europa.eu</a>

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		Observatory .		
<b>LIFE Programme</b>	EU programme for environment and climate goals, funding monitoring systems, sustainability tools and environmental data infrastructures .	Supports Observatory activities related to sustainability indicators, climate impact monitoring, and environmental analytics.	Competitive calls	<a href="https://cinea.ec.europa.eu/life_en">https://cinea.ec.europa.eu/life_en</a>
<b>Digital Europe Programme (DIGITAL)</b>	Programme supporting digital transformation, data spaces, AI tools, advanced digital skills and infrastructures .	Highly suitable for maintaining and upgrading the Observatory's digital platform, data ecosystems, AI-driven monitoring tools, and interoperability frameworks.	Calls & funding instruments	<a href="https://digital-strategy.ec.europa.eu/en/activities/digital-programme">https://digital-strategy.ec.europa.eu/en/activities/digital-programme</a>
<b>Digital Europe Programme European Data Spaces /</b>	EU funding and support for sectoral data spaces, trust frameworks and data governance infrastructures .	Directly aligned with the Observatory's role as a potential European Agrifood Data Hub, focusing on data governance, interoperability and	Calls / Work programmes	<a href="https://digital-strategy.ec.europa.eu">https://digital-strategy.ec.europa.eu</a>

### A Strategic Community of Practice and Observatory for the Agrifood Pact for Skills

		secure data sharing.		
<b>Interreg (European Territorial Cooperation)</b>	Programme supporting cooperation across EU borders to share practices, data, and innovation.	Supports Observatory cross-border data exchange, joint reporting, and collaborative governance models.	Competitive calls	<a href="https://interreg.eu">https://interreg.eu</a>
<b>Single Market Programme (SMP)</b>	Supports SME competitiveness, innovation ecosystems and sustainable market transitions.	Useful to empower agrifood SMEs within the Observatory network, strengthening innovation uptake and data sharing.	Calls & financial instruments	<a href="https://single-market-economy.ec.europa.eu">https://single-market-economy.ec.europa.eu</a>
<b>InvestEU – Social Investment and Skills &amp; SME Windows; InvestEU Advisory Hub</b>	EU investment programme providing guarantees and financial instruments for digital, innovative and sustainable projects.	Can support large-scale infrastructural or digital upgrades of the Observatory, including data infrastructures and long-term scaling.	Financial instrument (indirect access)	<a href="https://invest-eu.europa.eu">https://invest-eu.europa.eu</a>
<b>European Innovation Council (EIC) &amp; Startup Europe</b>	Funding for deep-tech innovation, entrepreneurship and digital transformation.	Relevant if the Observatory develops innovation services, entrepreneurial ecosystems or digital	Competitive calls & startup schemes	<a href="https://eic.ec.europa.eu">https://eic.ec.europa.eu</a>

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		incubation pathways.		
<b>Green Deal funds / LEADER / Regenerative Initiatives</b>	Local and regional funds supporting sustainability, regenerative practices and rural innovation.	Useful for piloting Observatory methodologies in real territories and testing models in rural/agri contexts.	Regional/national calls	<a href="https://agriculture.ec.europa.eu">https://agriculture.ec.europa.eu</a>

### National Funding Opportunities

National Programme Initiative	Short Description	Relevance for the Observatory	Type (Call / Framework)	Official Link
<b>ITALY</b>				
<b>PNRR National Recovery and Resilience Plan – Mission 2 (Green Transition) &amp; Mission 4 (Education and Research)</b>	National funding for digitalisation, sustainability, precision farming, training systems, and research infrastructures.	Supports pilots, digital tools, data monitoring methodologies, training modules, and territorial testing aligned with the Observatory's digital and skills components.	Competitive national calls (ministries & regions)	<a href="https://www.italiadomani.gov.it">https://www.italiadomani.gov.it</a>
<b>MASAF National Strategic Plan of the CAP (PSN PAC) - SRA30 – Innovation &amp; Advisory Services SRA10 – Cooperation for Innovation</b>	Funds multi-actor innovation projects, digital transition in agriculture, advisory systems, and knowledge-	Supports the Observatory's multi-stakeholder knowledge ecosystem, digital advisory tools, and methodologies for	National/regional calls (PSN CAP)	<a href="https://www.politicheagricole.it">https://www.politicheagricole.it</a>

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<b>(Operational Groups)</b>	exchange initiatives.	innovation uptake.		
<b>MUR – National Research Programmes (PRIN / FOE)- PRIN – Projects of National Research FOE – Funding for National Public Research Bodies</b>	Funds research on digitalisation, sustainability, data systems, environmental monitoring, and innovation infrastructures.	Supports data models, monitoring methodologies, analytical frameworks, and digital knowledge infrastructures.	Research calls	<a href="https://mur.gov.it">https://mur.gov.it</a>
<b>Cariplo, Compagnia di San Paolo, regional innovation foundations</b>	Funding for environmental sustainability, digital transformation and territorial innovation.	Useful for pilots, regional scaling, community engagement and co-creation processes.	Calls / Grants	<a href="https://www.fondazionecariplo.it">https://www.fondazionecariplo.it</a> <a href="https://www.compagniadisanpaolo.it">https://www.compagniadisanpaolo.it</a>
<b>BELGIUM</b>				
<b>VLAIO – Flanders Innovation &amp; Entrepreneurship - R&amp;D Grants; ICON Projects; Living Labs; Digital Flanders</b>	Funding for digital innovation, data platforms, SME innovation, and multi-stakeholder collaboration.	Supports development and scaling of data ecosystems, digital observatory infrastructure, SME engagement.	Competitive calls	<a href="https://www.vlaio.be">https://www.vlaio.be</a>
<b>SPW Recherche – Wallonia – Research Collective; DigitalWallonia4.ai; Circular &amp; Green Innovation</b>	Funds environmental innovation, AI systems, digital tools, and circular economy solutions.	Supports AI-enabled monitoring tools, data systems, and sustainability analytics.	Regional calls	<a href="https://recherche.wallonie.be">https://recherche.wallonie.be</a>

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<b>Innoviris Brussels Capital Region – Co-Create; R&amp;D Support for Digital &amp; Societal Transitions</b>	Mobility, sustainability, digital transformation and living labs.	Supports multi-stakeholder governance, territorial experimentation, and data-driven innovation.	Regional calls	<a href="https://innoviris.brussels">https://innoviris.brussels</a>
<b>National Research Funds (FWO &amp; F.R.S.– FNRS) - FWO (Flanders) / FNRS (Wallonia- Brussels Federation)</b>	Research funding for digital innovation, data systems, sustainability and socio-economic studies.	Supports analytical frameworks, impact studies, and long-term methodological research.	Research calls	<a href="https://www.fwo.be">https://www.fwo.be</a> <a href="https://www.frs-fnrs.be">https://www.frs-fnrs.be</a>











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Country	Name of the Programme	Level of Funding	Granting Body		Centralised; Decentralised	Name of the call	Project theme		Budget	Deadline		Beneficiaries	Useful link(s)	Comments	
			Granting Body	Granting Body Comments			Project theme	Other		Deadline date	Deadline status				
France	France travail	National	supports jobseekers and mobilises funding	is the national authority responsible for allocating and regulating funding for vocational training and apprenticeships	study programs/ apprenticeship (+0.55% of the gross payroll) collected by France competences and/or additional contractual contributions under a sectoral agreement	often centralised by an OPOC	POEC (Préparation Opérationnelle à l'Emploi Collective)	Education / Training / Micro-credentials	designed to prepare several job seekers acquires skills identified by a professional branch or an OPOC. * not limited to education/training/micro-credentials	3 to 4 months ( 400 h Max)	recurrent annual calls	On track	unemployed people	<a href="https://www.opoc.org/">https://www.opoc.org/</a> <a href="https://opoc.org/fr/emploi-collective-actuel-formation">https://opoc.org/fr/emploi-collective-actuel-formation</a>	sector of activity determines as having a shortage of skilled workers (Companies benefit from a talent pool without paying training fees)
France	France travail	National	supports jobseekers and mobilises funding	France Compétences (national government)	Statutory level (as described above)	centralized	POEI (Préparation Opérationnelle à l'Emploi Individuelle)	Education / Training / Micro-credentials	*It's an individual training program * not limited to education/training/micro-credentials	from a few hours to a few months ( 600 h Max)	It operates as an ongoing scheme rather than a time-limited call	On track	* unemployed people with a job offer promise that requires upskilling before employment * Workers with disabilities employed in a sheltered workshop.	<a href="https://actuel.formation.francecompetcences.fr/operationnelle-emploi-individuelle-poei/">https://actuel.formation.francecompetcences.fr/operationnelle-emploi-individuelle-poei/</a>	
France	OPOC OCAPIAT Opérateur de Compétences agriculture & IAA ("skills operator" agriculture and food industry)	National	upskilling of employees	OPOC /France compétences	France competences (via the Statutory level) and/or additional contractual contributions under a sectoral agreement (NB: these additional contributions are above the statutory minimum, exceeding the basic legal requirements.)	decentralised en région	diversity of programs	Other (specify)	This program concerns any sector of activity covered by agriculture and food industry including soft skills	according to an hourly rate	It operates as an ongoing scheme rather than a time-limited call	On track	employed people	<a href="https://www.ocapiat.fr/">https://www.ocapiat.fr/</a>	There are 11 skills operators in France which, depending on the professional sector (in our case OCAPIAT is the operator designed for agriculture and the food industry), fund employee training and support companies in analyzing the definition of their needs, particularly in light of the economic and technical changes in their sector of activity.
France	PRF Programme régional de formation	Regional	financé par conseils régionaux	Conseil régional (regional/local authority)	The region buys training places from QUALIOPI-certified providers	decentralized	18 specific regional programs	Other (specify)	address regional skills needs and support reintegration into the workforce	approximately €5,000 annually	recurrent annual calls	On track	Career changes, school leavers, and persons with disabilities.	<a href="https://www.france-travail.fr/candidation-formation/ma-aides-financieres/le-programme-regionale-de-formation.html">https://www.france-travail.fr/candidation-formation/ma-aides-financieres/le-programme-regionale-de-formation.html</a>	Each region establishes the specific characteristics of its initiatives, encompassing areas such as social inclusion, ecological transition, and beyond.*
France	BPI France	National	French investment Bank	Financial Institution	Ecological, energy and digital transition	decentralized	individual call	Ecological/energy and digital transition	Project holders in agricultural installations are individuals who wish to become farm managers by creating or taking over a farm	according to your business plan	It operates as an ongoing scheme rather than a time-limited call	On track	Business founder	<a href="https://www.bpi.fr/fr/financement/1/bpi-france">Financement   Bpi.france</a>	aid provided as loans
France	VIVEA	National	training insurance fund intended for self-employed agricultural workers	National Government	Specific contribution to the CPF (Personal training account)	centralized	New funding modalities of VIVEA	Other (specify)	*Facilitate farm installation and generational renewal in agriculture.*	3 000 euros per person/per year	Annual renewal during the duration of the installation project	N/A	Project holders in agricultural installations are individuals who wish to become farm managers by creating or taking over a farm	<a href="https://www.vivea.fr/financement/vivea-pour-les-futurs-agriculteurs-et-futurs-agricultices-un-levier-concret-pour-l-installation-vivea">Un nouveau financement VIVEA pour les futurs agriculteurs et futures agricultrices : un levier concret pour l'installation - VIVEA</a>	Since July 1, 2025, VIVEA has introduced a new funding modality to support individuals preparing to establish themselves in agriculture
France	chambre d'agriculture France (CASDAR)	National		Farmer / Producer Organisation	CASDAR	centralized	RMT ClimA	Sustainability & Climate Smart Agriculture	can finance equipment / platform	according to identified projects for climate change adaptation	Fin 2026	Approaching	Farmers	<a href="https://www.casdar.fr/developpement-et-formation-au-service-de-l'adaptation-au-changement-climatique-des-exploitations-agricoles-Chambre-d'Agriculture-France">Recherche Développement et formation au service de l'adaptation au changement climatique des exploitations agricoles - Chambre d'Agriculture France</a>	workshops by theme, seminars, webinars

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				Granting Body	Granting Body Comments			Project theme	Other		Deadline date	Deadline status			
Germany	ichtlinien (BIFÖR)	Regional		Authority	Forsten und Tourismus	centralised		/Micro -credentials	Scholarship for farmers	€ 2000 per person	None	N/A	Farmers	<a href="https://www.bundesagentur.de/Content/NavigationPages/Bildung/foerderungen/ichtlinien-bifoer.html">https://www.bundesagentur.de/Content/NavigationPages/Bildung/foerderungen/ichtlinien-bifoer.html</a>	
Germany	Continuing Education Scholarship (Weiterbildungstipendium)	National	Individual grants for young skilled workers; typically several thousand EUR over multiple years.	National Government	Federal Ministry of Education and Research (BMBWF)	centralized	Continuing Education Scholarship	Education / Training / Micro -credentials	Scholarship for farmers	9135€ per person	None	N/A	Farmers	<a href="https://www.landwirtschaftskammer.de/bildung/weite-rbildungstipendium/index.htm">https://www.landwirtschaftskammer.de/bildung/weite-rbildungstipendium/index.htm</a>	
Germany	LEADER – Rural Development (CAP Strategic Plan)	Regional	Funding intensity and amounts depend on Local Action Groups (LAGs)	Regional / Local Authority	Bavarian State Government / LAGs	decentralized		Sustainability & Climate Smart Agriculture	Training, knowledge transfer, rural innovation, smart villages.	Part of Bavaria's CAP/ELER budget	Set Locally	N/A	Farmers, SMEs, cooperatives, municipalities, NGOs, training providers.	<a href="https://www.stmff.bayern.de/leader/index.html">https://www.stmff.bayern.de/leader/index.html</a>	
Germany	Joint Task for the Improvement of Agricultural Structures and Coastal Protection (GAK)	National		Regional / Local Authority	Federal Ministry of Food and Agriculture (BMEL) + Bavarian State Government / LAGs	mixed	No single call name	Education / Training / Micro -credentials	Advisory services, training, capacity building.	Annual federal-state budget	Varies by measure	N/A	Farmers, rural businesses, advisory and training bodies.	<a href="https://www.bml.de/DE/themen/laendliche-regionen/fortbildung-des-laendlichen-raumes/gemeinschaftsaufgabe-struktur-kuestenschutz/gak.html">https://www.bml.de/DE/themen/laendliche-regionen/fortbildung-des-laendlichen-raumes/gemeinschaftsaufgabe-struktur-kuestenschutz/gak.html</a>	