Handing Over the Reins: A Comparative Study of Intergenerational Farm Transfers in England, France and Canada

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Paper prepared for presentation at the Xth EAAE Congress
'Exploring Diversity in the European Agri-Food System',
Zaragoza (Spain), 28-31 August 2002

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One of the most critical stages in the development of any family business is the transfer of its ownership and control to the next generation. However, the process by which this transfer is achieved in farming has been one of the least-researched facets of farm business management. This paper draws on an on-going research project which seeks to remedy this omission. Comparable data for a total of 3,500 farms in England, France and Canada has been analysed to provide a portrait of the main features of the process in which the older generation retires from the farm while the younger generation takes over its ownership and management. The paper begins by defining the three distinct, but interrelated, processes of inheritance, succession and retirement. Focusing on the process of succession, it briefly summarises some of the main similarities and differences in current practice among farm families in the three countries. Having presented a typology of patterns of farming succession based on a review of the literature, the paper goes on to modify this in the light of findings from the more recent surveys.

Keywords: Family Farms; Retirement; Business Succession

The intergenerational transfer of the farm family business

The prime objectives of many farm family businesses are the same as those of other *unquoted* businesses (i.e. those not listed on the Stock Exchange), "to maintain control and pass on a secure and sound business to the next generation" (Hay and Morris 1984). In some cases this objective is associated with the desire to "keep the name on the land", that is, to ensure that both the family and the business are successfully reproduced and continue to farm in a particular locality. This is the pattern depicted by Arensberg and Kimball (1968) in Ireland and by Voyce (1989) in south-west France.

However, there is a second pattern in which the attachment is to the occupation of farming rather than to a particular piece of land (Harrison 1981; Laband and Lentz 1983; Blanc 1987). In this case, the family may move away from the "home farm" but remain active in farming. Thus, while Harrison found that 80 per cent of the full-time farmers covered in his national survey of English farm businesses were the children of farmers, only 50 per cent were farming the same land as their fathers. Family continuity in farming does not necessarily imply geographic immobility and indeed anecdotal evidence of the new wave of migration of European farmers to North America perhaps illustrates the increasing geographic mobility of the farm family business.

Whichever of these two patterns is followed, a key characteristic of the farm family business is that both ownership and managerial control are transferred between the generations with the passage of time. But there is also considerable variation in this process (Gasson and Errington 1993: 182-189, Potter and Lobley 1996a: 66) and substantial differences have been observed between different parts of Europe, even within the same country (Perrier-Cornet *et al* 1991). Exported to the New World, these different traditions have persisted in different parts of north America several generations after the original European settlers established themselves in farming (Salamon and Davis-Brown 1988). This phenomenon is of considerable interest to agricultural economists, rural sociologists and anthropologists. However, compared with topics such as the gendered division of labour or the pluriactivity of farming families, it has attracted relatively little empirical investigation in recent years. This is unfortunate, not least because a growing body of evidence suggests the pattern of intergenerational farm transfer might have very significant implications for agricultural restructuring and rural development policies.

For the farm management specialist the crucial issue is probably the hiatus in business performance caused by the process of intergenerational transfer. As Harl (1972) and Boehlje and Eidman (1984) have pointed out, during the point of the family cycle where owner-equity is at its peak and the new generation is seeking to increase productivity or sustainability through investment, the older generation may be engaged in disinvestment to provide for their retirement. This is particularly likely where no separate pension provision has been made and the farm business itself is regarded as the retirement “nest-egg” (Pesquin *et al* 1999).

For the lawyer, accountant, extension worker or consultant seeking to advise the individual farm business, the main focus of attention will be how to maintain a viable business for the next generation, minimising the financial and emotional stress that is increasingly associated with the pursuit of this goal. The level of stress involved with intergenerational transfers may be considerably greater now than it was among previous generations. Some long-standing social norms (such as primogeniture) have been increasingly challenged and agricultural support measures in many countries have been capitalised into land values thus inflating the value of farm. Even for a medium-sized farm family business in the UK, the transfer of the land and quota to one child may make them into a paper millionaire, creating major problems for parents seeking “fair” treatment for all their children.

For the policy-maker, the interest in intergenerational transfers stems from increasing evidence that they have a considerable influence on farmer behaviour and their responsiveness to particular policy measures. For example, following their investigation of succession, successor and retirement effects on the behaviour of farm families in Britain, Potter and Lobley (1996b: 303) conclude that “planning for succession and carrying it through has an often profound impact on the management histories of farmers, triggering new phases of development or bringing others to a close on some farms and accounting for very long periods of apparently unbroken expansion elsewhere”.

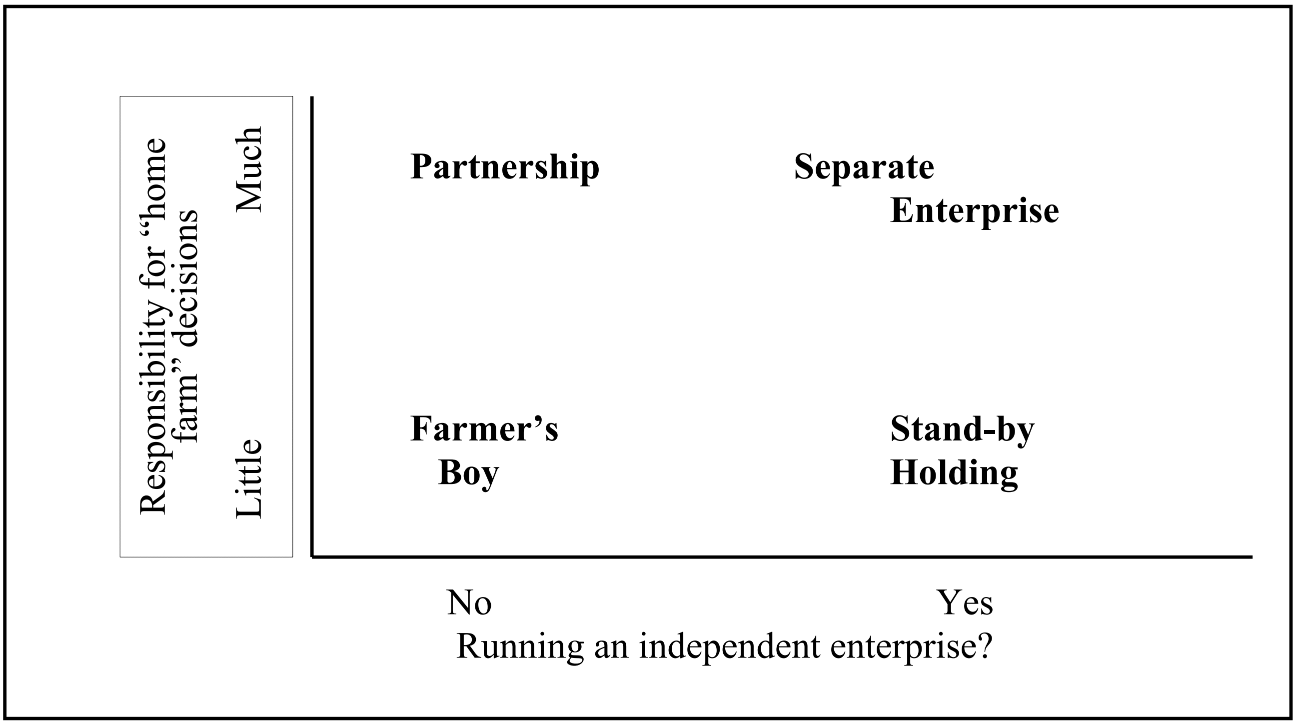
Finally, the encouragement of an earlier transfer of the farm business may be an explicit policy objective of Governments seeking to speed the adjustment of the farm sector. This is amply illustrated by the early retirement provisions of the Rural Development Regulation. In deciding whether to opt into, or out of, this component of the Regulation at mid-term review, it is important that policy-makers understand the existing processes of intergenerational transfer in their respective countries.

Patterns of farm succession: A suggested typology

The intergenerational transfer of the farm family business involves three distinct but related processes (Gasson and Errington 1993: 204-6). *Inheritance* denotes the legal transfer of ownership of the business assets (including land and quota); *succession* refers to the transfer of managerial control over the use of these assets, while *retirement* marks the withdrawal of the present manager from active managerial control and/or involvement in manual work on the farm. While conceptually distinct, the three are clearly related. Retirement is the mirror image of succession - as the new generation succeeds, the old generation retires - and since ownership confers the ultimate legal right to take decisions over the disposition of assets, inheritance automatically reassigns managerial control. This paper concentrates on the process of succession.

The existing literature describes many different patterns for the transfer of the managerial control of the farm family business from one generation to the next. There appear to be two key distinctions in these patterns, namely the amount of responsibility exercised by the successor in taking decisions on the "home farm" (i.e. the extent of delegated decision-taking) and the extent to which he or she is able to run a separate enterprise such as a pig unit or even a separate farm. Figure 1 uses these two dimensions to generate four ideal types of farming succession. Much of the empirical evidence found in the literature can be related to one or other of these types.

Figure 1 Patterns of succession among farm family businesses



Source: Gasson and Errington (1993: 204)

In the case of the "Stand-by holding" (Blanc and Perrier-Cornet 1992), the potential successor is set up on a separate farm where he[1] works for a number of years, developing his own husbandry and managerial skills. He may share machinery with the home farm and there is likely to be some co-operative labour-sharing at peak times, but he is substantially independent. Financial independence is particularly important since the additional holding provides a source of income and the "home farm" is not required to support two generations. Moreover, the successor can even begin to build up a separate capital base with which to pay out parents or siblings when he takes ownership of the home farm. Eventually, his father

[1] Throughout this section of the paper, the successor is referred to as male, reflecting current practice in the majority of European farm family businesses.

retires and the son's holding may be amalgamated with the home farm or he may simply swap farm (and farmhouse) with his parents who move on to the son's farm which now functions as a "retirement holding" for his parents.

In the case of the "Separate enterprise", the home farm is itself large enough to give the potential successor enough scope to develop his own enterprise, perhaps a pig unit or sheep flock. Once again, he has a good deal of autonomy in the development and management of this enterprise, developing skills which he is increasingly able to apply to the main enterprises on the farm on which he works alongside his father and with whom he often shares decisions. The separate enterprise also gives the successor a degree of financial independence and may again allow him to develop his own capital base. The French phrase to describe this arrangement, *association et autonomie*, provides an apt description of its two essential components.

Even where he does not have his own enterprise, the potential successor may gradually acquire considerable responsibility for particular aspects of the management of the home farm where this is feasible. A particular expertise with machinery, for example, may lead his father to involve him in discussions over machinery replacement and eventually leave such decisions to the successor himself. In this way, the potential successor works in a "partnership" which may eventually be cemented in a formal partnership agreement, such as the Dutch *Maatschap*.

In the case of the pattern labeled "Farmer's boy", the potential successor may spend many years working with (or more accurately "for") his father on the family farm but he has very little involvement in managerial activities and is mainly used as a source of manual labour. Because of this he has little opportunity to develop the managerial skills that he will eventually need in taking over the family business. To all intents and purposes he is simply a hired worker, though he may not even enjoy the hired worker's wage, and continues to be provided with an allowance on the grounds that his reward will be his eventual ownership of the family farm (the *salaire différé* to which French authors refer). Managerial control comes suddenly with his father's death or retirement and he may be ill-prepared for the management of the farm. The French term *aide familial(e)* aptly describes the role and status of the child involved in this pattern of succession.

These four cases are ideal types. In reality, the patterns of succession are many and varied, drawing elements from more than one ideal type. Moreover, the process of succession may involve movement from one category to another before managerial control is completely transferred.

Some empirical evidence

A number of surveys over the past decade have sought to explore geographic variation in the patterns of farming succession. To date, studies have been completed in England (Errington and Tranter 1991, Gasson *et al* 1998), France (Errington *et al* 1995) and Canada (Errington 1998)[2]. Information was gathered through structured self-completion postal questionnaires. While this may be a rather crude instrument with which to explore a process as complex as the transfer of managerial control, it did allow some basic information to be gathered from a substantial sample of farmers in a systematic and replicable fashion,

[2] In collaboration with the Beginning Farmers' Center of Iowa State University, the series of studies has now been extended to include the States of Iowa, Virginia and Pennsylvania in the USA, as well as Japan.

allowing some useful comparisons both between and within the three countries. Subtle differences in language (itself the product of particular social norms and institutional contexts) make comparison far from straightforward but the surveys did highlight some interesting differences - and similarities - between farmers in the different countries. The surveys have also generated hypotheses to be tested more rigorously using other research methods such as those in the ethnographic or anthropological tradition which have already proved so fruitful in this field - see for example Hutson (1987), Abrahams (1991), Keating and Little (1991) and Salamon (1992).

Details of the survey design, response rates and the analysis of non-response bias can be found elsewhere (Errington and Tranter, Gasson *et al* , Errington *et al* ,Errington *op cit*). Suffice to say that the surveys provided useable data from a total of just over 3,500 respondents (Canada 1,270; France 1,426; England 814). There was evidence of some non-response bias towards larger farms and older farmers in England and France, but this was not the case in Canada. In all three countries there was some evidence that response rates were higher among those who had attained educational qualifications since leaving secondary school and this needs to be borne in mind when examining the survey findings.

The surveys have gathered identical information in each country on the three main facets of intergenerational farm transfers, namely retirement, succession and inheritance. Among other topics, the questionnaire seeks information on the extent to which managerial control had already been transferred to a successor working on the same farm as the respondent. A question was developed to identify the current locus of managerial control between the two generations, and the next section explains how this was done.

Identifying the locus of managerial control

A long-established approach to occupational analysis and classification involves the listing of a number of activities and the identification of which individuals are involved in which activities. A variety of multivariate techniques such as cluster analysis and discriminant analysis may then be used to identify underlying occupational groups and measure their distinctiveness from each other. Marsh (1971) and Christal (1973) used this approach to identify occupational categories in the US Airforce and by the end of the decade it was being used in the UK to analyse a wide range of occupations (Youngman *et al* 1978). In the late 1970s Errington adapted the approach to examine staff supervision in British agriculture (Errington 1980) and in the early 1980s both Errington (1984) and Hastings (1984) extended its use to the study of farm business management.

Because of the large number of individual activities involved in farm management, the ideal approach would be to select a random sample from a comprehensive list of all farm management activities. However, since no such list exists, a purposive selection was made across what was thought to be the full range of such activities. This was based on a conceptual model suggested by Giles and Stansfield (1990: 9) who emphasise the place of decision-taking at the heart of management. Any decision requires the decision-taker to exercise judgement on the basis of knowledge gained from informal/experiential sources as well as from formal/external sources (Errington 1986). Managerial decisions are conceptualised as arising within the four main domains of management, namely production (e.g. deciding what type of agrochemical spray to use), marketing (e.g. deciding where to sell finished cattle), staffing (e.g. deciding when to take on additional staff) and finance (e.g. deciding whether to obtain a loan). Each of these decisions may be conceptualised as lying on a multi-dimensional surface which separates those less likely to be delegated from those more likely to be delegated by the owner-manager. Errington (1986) suggests four dimensions to this hypothetical surface, *viz* impact on the attainment of business objectives; reversibility; the nature of decision-rules (explicit *vs* implicit); the nature of the information on which decisions are based (formal/external *vs* informal/experiential).

As Table 1 shows, the items used by Hastings (1984) in his study of intergenerational farm transfers on 25 Warwickshire farms not only spreads across these four domains of management but also reflect some of the differences on the multidimensional surface described by Errington. Hastings' list was therefore adopted for the English, French and Canadian surveys. For each item, respondents (who had previously been asked "Have you identified a potential successor who will eventually take over the management of your farm?") were asked "If your successor is working on your farm, please place a mark at the point on the scale which most accurately represents the way in which each decision or action is taken". The 5-point scale[3] was anchored at either end with the statements "Decision/action taken by yourself alone" and "Decision/action taken by your successor alone". In the centre was the statement "Decision/action shared between yourself and your successor".

Table 1 A checklist of managerial decisions/activities

Domain of Management*	Decision/activity
S, P	1. Plan day-to-day work
P	2. Make annual crop/stock plans
P	3. Decide the mix and type of enterprises in the longer-term
P	4. Decide type and level of feed/fertilisers/sprays/drugs used
S,P	5. Decide timing of operations activities
M	6. Decide when to sell crops/livestock
M	7. Negotiate sales of crops/livestock
F	8. Decide when to pay bills
P, M, F	9. Decide type and make of machines and equipment
M, F	10. Negotiate purchase of machines and equipment
S	11. Decide when to take on additional employees
S	12. Recruit and select employees
S, P	13. Decide amount and quality of work expected
S	14. Supervise staff at work
S, P	15. Decide work method/way jobs are done
F	16. Decide and plan capital projects
F	17. Identify sources and negotiate loans and finance

*Key: S Staffing; P Production; F Finance; M Marketing

Source: Adapted from Hastings 1984: 257

The limitations of the approach are recognised, particularly with respect to recording the perceptions of only the older generation. However, in his field interviews Hastings gathered information from both father and son and reports a high level of consistency between them (Hastings 1984: 192).

[3] The original English survey (Errington and Tranter 1991) used an 11-point scale but this was reduced to 7 in the 1997 survey in England, and to 5 in the surveys in France and Canada.

Findings: Patterns of farming succession

Previous reports on this work (Errington *et al* 1995, Errington 1998) have shown that:

1. Though there are some minor differences between countries, the rank order of the items in terms of their mean scores are very similar. This suggests that on farms where two generations do work alongside each other for a period of time after the successor has left full-time education, the process of succession involves the progressive transfer of particular types of decision in a fairly systematic fashion. In other words, there is a discernable succession "ladder" which is essentially the same in all three countries, and indeed may have universal applicability. First, a number of *technical* and *tactical* decisions are transferred. Next come the decisions related to the longer-term *strategic* planning of the farm business. Then there are decisions related to the *employment and management of farm staff* (where there are any employees). On the fourth rung of the ladder the successor begins to become involved directly in *financial* matters such as negotiating sales of farm products - crops and livestock - and in identifying and negotiating financial loans. The fifth and final rung lies significantly higher than all the others. It is closely connected with the ability to make payments from the business account and is characterised as *control of the purse strings*. It is the last areas of responsibility to be handed on to the next generation and may only come with the current owner's death.

2. The succession process tends to be much more rapid in France than it is in England, while Ontario and Québec both fall between these two extremes. The difference may stem from deliberate policy - the early retirement incentives provided by the French government to encourage the earlier transfer of managerial control, for example (Daucé, Le Hy and Perrier-Cornet 1993, Trochon 1999). It may stem from the different economic circumstances faced by farmers in the different countries. For example, French farms tend to be smaller than their English counterparts and there is therefore less opportunity for more than one generation to work alongside each other for long periods of time. Moreover, English farmers tend to rely on continuing income from the farm family business to provide for them in their old age and they may therefore have a greater interest in protecting their "pension" by maintaining managerial control of the business (Errington, Barahona and Comont 1995: 60-63, Pesquin *et al* 1999). There may also be some fundamental differences in social norms between the countries which condition the behaviour of both generations.

This paper draws on the Canadian surveys in 1997 and a re-survey of the English sample in the same year to consider the different patterns of succession shown in Figure 1. These more recent surveys in the larger project include an additional question to establish whether those successors working alongside the older generation had "total responsibility for any enterprise (e.g. grains, pigs, custom work, machinery)". For those identified successors not currently working alongside the older generation, another question established how they were presently occupied, distinguishing categories such as "college/university", "employed full-time on another farm", "running a non-farm business" and "off-farm employment".

In order to distinguish between the two categories of "farmer's boy" and "partnership", included in Figure 1, it was necessary to derive a single measure from the 17 items listed in table 1 to distinguish those who were sharing considerable responsibility for management with the older generation from those who were not. Since the items in the list were selected purposively rather than randomly, it was not appropriate to proceed by simple addition of all the individual responsibility scores. Instead, hierarchical cluster analysis was used to identify a sub-set of six decisions that appeared to be clearly separated from each other (items 4, 5, 7, 8, 9, 17 in table 1) and the mean responsibility score calculated. This ranged from 6 (no sharing of responsibility with the successor) to 30 (responsibility for all decisions delegated completely to the successor). Where the score was 15 or more, respondents who were not running their own separate enterprise were allocated to the "partnership" category. Where it was less than 15 they were allocated to the "farmer's boy" category. The same procedure was used to sub-divide the "Separate Enterprise" category between those who were also "partners" in the main farm (i.e. scoring 15 or more) and those who were not.

The original typology was then modified both to distinguish these categories and to identify those running a separate farm. Two other categories were also included for those successors (aged 16 or over) not yet working in farming, namely those in full-time education and those on some form of "professional detour" such as running a non-farm business, employed off-farm or travelling abroad.

Table 2 Present occupation of identified successors aged 16 years or over*: England and Canada, 1997 (% in each category)

	England** (n=221)	**Ontario** (n=164)	**Québec** (n=244)
Farmer's Boy	32.3	8.8	7.7
Partnership	3.7	7.0	3.9
Separate Enterprise:	44.1	29.0	45.8
of which, responsibility score 15+	21.7	19.9	20.3
responsibility score <15	22.4	9.1	25.5
Other:	19.9	55.2	42.6
of which, runs own farm	6.8	9.9	5.9
in full-time education	2.9	15.1	22.2
other 'détour professionnel'	10.2	30.2	14.5
Total	100%	100%	100%

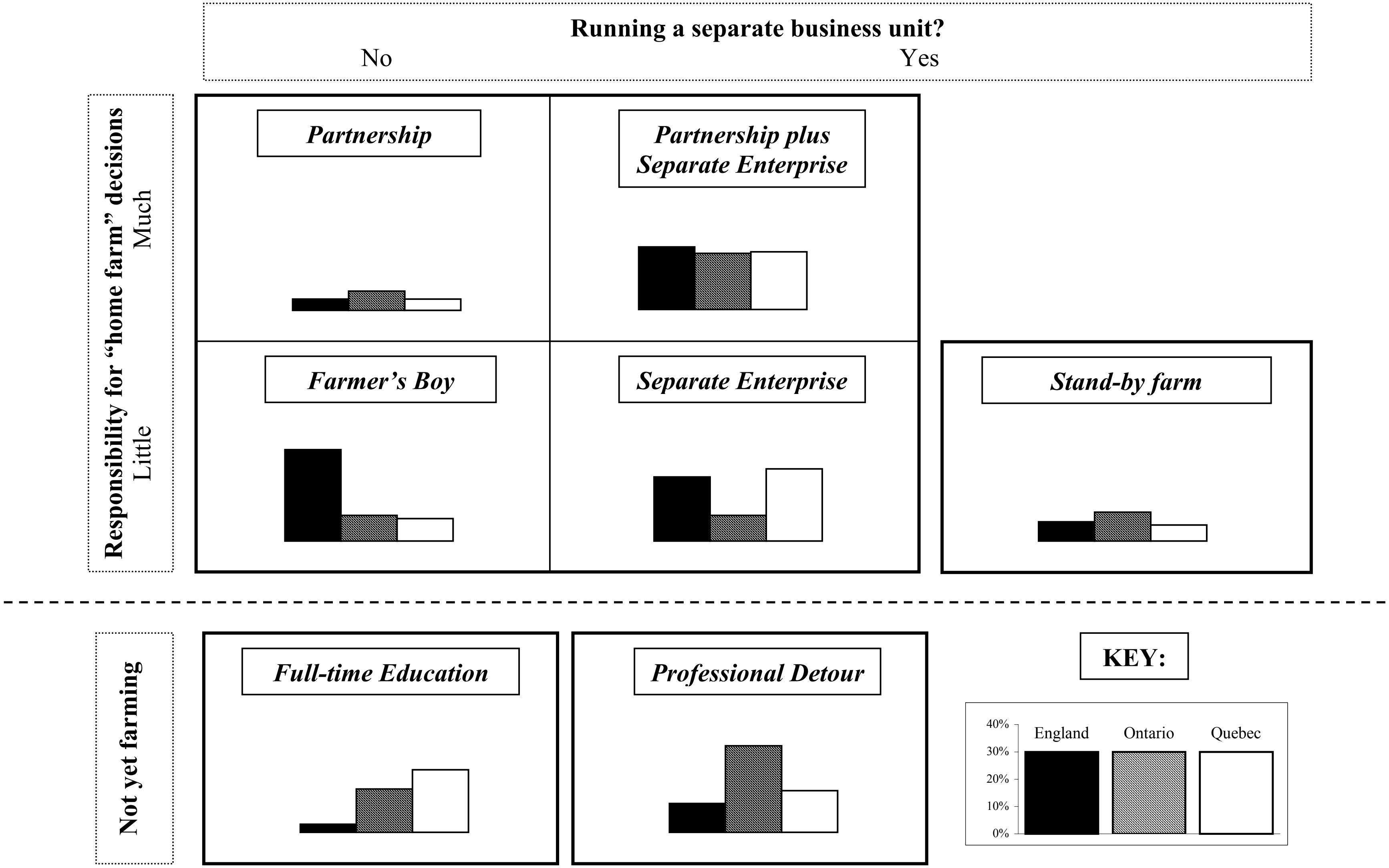
*a similar proportion of respondents in each Canadian province had an identified successor aged 16 or over – 31% in Ontario and 33% in Quebec. The proportion was considerably higher in England (42%)

** this data comes from a follow-up survey of respondents to the original English survey of 1990 (Gasson, Errington and Tranter 1998)

Source: Author's surveys

The results of this analysis are shown in table 2 and the modified typology as Figure 2. It is important to recognise that these findings are based on cross-sectional data showing the distribution of identified successors between the different categories at the time of the survey. The data reveal some striking differences between the three localities. The English successors tended to be rather older than their Canadian counterparts (reporting a mean of 32 years compared with 30 in Ontario and 26 in Québec) largely as a result of the slower pace at which full managerial control is transferred to the younger generation in English farming (see

Figure 2 Patterns of Farming Succession in England, Ontario and Québec (Source: Author's surveys)



above)[4]. As a result, many fewer were in full-time education at the time of the survey (though there was little difference in the proportion reported to have some further or higher education qualification by the time they were 25 - 69% in England, 70% in Ontario and 68% in Québec).

The use of a "stand-by farm" appears to be relatively rare in either England or Canada, accounting for only 10% of cases in Ontario and 6% in England and Québec. In England, where this pattern was more common among earlier generations, this is probably the result of the current high price of land and the lack of opportunities for new entrants to rent farms (Hastings 1984, Whitehead *et al* 1997).

A substantial proportion of successors in both Canadian provinces were not yet working on the home farm (55% in Ontario; 43% in Québec). While the Québécois were somewhat more likely to be involved in post-secondary education being somewhat younger, a much higher proportion of their Ontario counterparts were involved in some other form of "professional detour", often working in paid employment outside the agricultural sector (20% in Ontario; 7% in Québec).

Despite the similarity in farm size between the two Canadian provinces, a rather higher proportion of Québécois successors (57%, as against 45% in Ontario) were working alongside the older generation on the same farm. However, while many of them had a "separate enterprise" for which they had total responsibility the majority had relatively little responsibility delegated to them for decisions relating to the "home farm" as a whole.

However, the most striking difference between all three locations is the very much higher proportion of English successors in the "Farmer's Boy" category, working on the home farm with no responsibility for a separate enterprise of their own and relatively little involvement in the management of the farm family business. Nearly half (44%) of these successors were more than 30 years old and 14% were over 40 years old.

Conclusions

This paper has sought to identify similarities and differences in the patterns of farming succession found in England, France and two Canadian Provinces. It must be remembered that this analysis is based on cross-sectional data. Longitudinal studies would be required to examine the extent to which individuals move between categories, from a professional detour, for example, to work alongside the older generation as a "farmer's boy" before eventually becoming a partner in the family firm. However, a number of points are clear.

Relatively few successors appear to prepare for taking over managerial control of the home farm by running a separate "standby farm". In Canada they are more likely to follow a professional detour, sometimes outside farming. In England they are more likely to work alongside the older generation on the home farm for a long period of time.

In both England and Canada a significant proportion of successors run a separate enterprise on the home farm. This may help develop some of the business management skills eventually required to run the farm as a whole. The opportunity to develop such an enterprise

[4] This finding is consistent with the results of national censuses which show that English farmers are on average considerably older than their French or Canadian counterparts (Errington 1998).

may have increased in recent years with the encouragement of farm business diversification schemes, offering the possibility to earn additional income and to develop new skills that are potentially useful to farm family business as a whole.

English farmers are much more likely to have a successor working alongside them than either their French or Canadian counterparts. They appear to hand over managerial control of the home farm much more slowly, even though their successors are climbing a "succession ladder" that is virtually identical to that in France or Canada. In all three countries there appears to be a progressive transfer of different types of responsibility, starting with a number of technical and short-term tactical decisions, and ending with the transfer of financial decisions and ultimately financial control of the farm family business itself.

Some important implications flow from this picture. The sequence in which different areas of managerial control are transferred suggests that the optimum time for developing financial management skills may come many years after successors have completed their full-time education. It is therefore necessary to ensure that appropriate "post-experience" training opportunities are available to farming families for *Continuing Professional Development* (CPD) at that time. It is certainly the case that unprepared successors who have worked only as a "farmer's boy" are likely to present an increasing threat to the survival of farm family businesses which are tending to become ever more reliant on the business management skills of their owners.

While the succession ladder is essentially the same in all three countries, the rate at which it is climbed varies substantially between countries and is very much faster in France than it is in England. This is probably because France has opted in to the "early retirement" and "installation" ("beginning farmer") elements of the Rural Development Regulation of the Common Agricultural Policy (CAP) while the UK government has resolutely avoided opting in to this part of the Regulation. As a result, English farmers tend to be much older than their French (or indeed Canadian) counterparts and there are many more cases where the younger generation is presently working alongside the older generation as "farmer's boy" with little or no involvement in managerial decision-making. This may represent a significant underutilisation of the human resources potentially available to these businesses. It may also be a significant cause of stress within farming families, particularly at a time of agricultural recession when good strategic planning that takes account of the goals, ambitions and potential of all family members is so essential to the survival of the farm family business.

Acknowledgements

I am very grateful to all those colleagues who have contributed to this work over nearly two decades: to Mike Hastings for the original collaboration which led to the check-list of supervisory, and later managerial activities, in farming; to Richard Tranter and Carlos Barahona at The University of Reading and Eric Comont at the Institut Supérieur d'Agriculture in Lille for help with the original surveys in England and France; to the Canadian High Commission in London whose Faculty Research Award made the Canadian replication possible; to the staff of the Department of Sociology and Anthropology of Concordia University (Montréal) who were such kind and considerate hosts during my stay there in 1997; to Ray Bollman and his colleagues at Statistics Canada who answered all my queries, despatched the questionnaires and provided so much encouragement along the way;

to Diane Parent of L'Université Laval (Québec City) and Wayne Caldwell of Huron County and the University of Guelph for help and encouragement with the questionnaires; and to Roger des Ormeaux for his excellent translations into French (as well as some occasional - and welcome - suggestions for improvement to my original English text). And as we enter the new Millennium I am grateful for the productive collaboration with John Baker and Professor Mike Duffy of Beginning Farmers' Center at Iowa State University which has already led to replications of this work in Iowa and Japan.

I am grateful to colleagues at the Seale-Hayne Campus of the University of Plymouth - Martyn Warren, Paul Brassley and Matt Lobley - for their constructive comments on an earlier version of this paper.

Last, but by no means least, I am pleased to acknowledge the considerable practical assistance and continuing intellectual stimulus provided by my colleague Dr Ruth Gasson. I particularly value the time in which we worked together writing our book, *The Farm Family Business*. This continues to provide me with much of the stimulus for my ongoing research in this area. I am also grateful for her substantial input to the 1997 replication of the farm survey in England and for her suggested adaptation of the original questionnaire that made possible the empirical investigation of the typology of farming succession contained in this paper. Needless to say, the present author alone is responsible for any errors of omission or commission remaining in this paper.

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Nom du document : 067-errington
Dossier : C:\Documents and Settings\gilles\Bureau\EAAE
Modèle : C:\Documents and Settings\gilles\Application Data\Microsoft\Modèles\Normal.dot
Titre : Handing over the reins: A comparative study of intergenerational farm transfers in England and Canada
Sujet :
Auteur : aerrington
Mots clés :
Commentaires :
Date de création : 07/03/2002 18:06
N° de révision : 2
Dernier enregistr. le : 07/03/2002 18:06
Dernier enregistrement par : GILLE
Temps total d'édition : 1 Minute
Dernière impression sur : 07/03/2002 18:07
Tel qu'à la dernière impression
Nombre de pages : 14
Nombre de mots : 5 770 (approx.)
Nombre de caractères : 32 889 (approx.)