



Statement: **Co-operation is a prerequisite.**

	QUESTIONS	ANSWERS			
			%		%
Sub: 1 Q:1.1	Do you agree with the scenarios presented of three sectors concerning collaboration and confidence?	YES, I agree because.... <ul style="list-style-type: none"> ▪ Retailers are the strongest actors which decide and said the laws ▪ The food processors understand the necessity of information flows in the supply chain An association of producers might be able to facilitate cooperation ▪ All players within a supply chain exchange and share information one another only if they can take advantage from it. 	60	No, I disagree because... <ul style="list-style-type: none"> ▪ Never one of three sectors will enter any collaborative platform if they do not see any economic benefit. ▪ only retailers have the resources to utilise the sophisticated information ▪ 95% of the number of food processors are SME's ▪ Retailers information wealth is not transferred to upstream players 	50
Sub: 1 Q:1.2	Are the differences in these scenarios by country in the EU?	Yes, there are differences <ul style="list-style-type: none"> ▪ The greater difficulty is to associated, in particular countries recently annexed in EU. ▪ There are countries with a higher market share of supermarkets (like France and Germany) 	70	No, there are not differences <ul style="list-style-type: none"> ▪ Maybe we can see only different activity levels and willingness to cooperate 	10
Sub: 1 Q:2.2	Can confidence and cooperation be enforced to an agri-food player?	Yes, because.... <ul style="list-style-type: none"> ▪ Enforcement can be helpful especially for traceability issues. The mutual dependences are helpful for influencing cooperation 	30	Yes, but... <ul style="list-style-type: none"> ▪ only modestly, because the actors are not ready to share the information. A fair economic participation between the actors can gives more responsibility to the actors ▪ dependences are typically asymmetric, retailers often require suppliers to conform to certain standards ▪ in some case, for example in the areas of standards and traceability, enforcement is necessary ▪ It is not easy. There are some food-processes that constrain the cooperation and the confidence, such as traceability 	50





Sub: 4 Q:1.2	Do you think a system that discriminates between confidential information and exchangeable information facilitates the co-operation between food chain players and can pave the way for implementation of supply chain platforms?	Yes, but... <ul style="list-style-type: none"> ▪ It will be the definition of common standard and requirements for change the information ▪ Different access levels would work as a tool to limit information volumes and to group info, to make it more efficient to use. It's important when the retailers looking where to get the best deal. 	90	No <ul style="list-style-type: none"> ▪ There is no issue with exchanging information where the parties appreciate the relevance. 	10
Sub: 4 Q:1.3	Do you think that e-platforms within which there is discrimination of information, will facilitate involvement of retailers?	Yes <ul style="list-style-type: none"> ▪ If the participation of retailers in e-platform is beneficial for them, they will join it, providing the information required. ▪ One of the main factors to do a business in the system is going to be access and transparency of the information. 	80	No <ul style="list-style-type: none"> ▪ this becomes only important once they have been involved and using the e-platforms. 	20
Sub: 3 Q:3.1	From an economic point of you, will inter-brand competition between companies (producers, processors, distributors) be hindered in an e-platform?	No <ul style="list-style-type: none"> ▪ The adoption of an e-platform can improve market transparency and there by contribute to more efficient markets ▪ The competition of different brands will stay the same 	60	No, but... <ul style="list-style-type: none"> ▪ sharing information is essential to improve service and lower costs and therefore benefits the consumer 	20
Sub: 3 Q:3.2	Considering the natural behaviour of economic actors, will the collaborative e-platforms result in a control of product price?	Yes <ul style="list-style-type: none"> ▪ The cumulative effect would be more efficient markets ▪ The better knowledge about prices will help to lover the price level for same products ▪ There is a major control of product prices 	50	No <ul style="list-style-type: none"> ▪ The price difference could even increase between conventional and better quality products 	50





Statement: ICT is a tool for improving food quality.

	QUESTIONS	ANSWERS			
			%		%
Sub: 2 Q:4.2	Could a legally binding framework for a supply chain e-platform better guarantee food quality by applying a e-platform quality trade mark, compared to a co-operation of independent subjects?	<ul style="list-style-type: none"> A legally binding framework seems to work better 		<ul style="list-style-type: none"> Enforcement and legally binding are only workable in relation to specific issues as traceability and quality. 	
Sub: 2 Q:4.3	If yes, what obstacles do you see to a binding framework?	Obstacles are: <ul style="list-style-type: none"> Limits as creativity and versatility of the independent subject The players do not like enforcement, Inertia of farmers not to trust buyers and viceversa. 			
Sub: 2 Q:4.4	Can the establishment of an e-platform quality trade mark increase the negotiation power of food producers and food processors, in respect to retailers, and represent so an equalising element in the balance of dominating positions?	Yes but... There are many other potential equalising elements (e.g. processors and distributors had better information on certain aspects of their trade with retailers). This information could be provide using an e-platform. Also if food processors and distributors truly understood their cost to serve retailers they would have more power in negotiations. The balance of dominating positions depends on the relationship with consumers. Changing this factor may increase their negotiation power			
Sub: 2 Q:5.1	In your opinion, what valid methodologies could be used to measure quality performances taking into account the increasing convenience values?	<ul style="list-style-type: none"> To measure quality performances is it necessary to control parameters as: delivery time, food safety, food components, traceability, etc. Sensory analyses trough validated consume panels can be used to measure these performances <p>It can measured by consumer tests</p>			



Sub: 4 Q:2.3	Do you think that an objective-driven e-platform is the only possible way to establish food chain platforms?	Yes The strategic objective for an enterprise if joining an e-platform is always to improve business which implies an objective driven e-platform	50	Yes, if... All players joining an e-platform and having same strategic objectives they will be equals benefit.	50
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Statement: **“Transparent food safety” increases consumer confidence.**

	QUESTIONS	ANSWERS
Sub: 2 Q:2.1	In your opinion, what is the specific quality and safety information on food products of interest to consumers?	<ul style="list-style-type: none"> ▪ <u>Health</u>: some specific food components related to health (if the product contain toxic residues) ▪ <u>Risk Communication</u>: having of a food any specific risk of containing allergens or GMO ingredients ▪ <u>Information about the producers</u>: HACCP applications, when the product was produced ▪ <u>Traceability information</u> ▪ <u>Information on conservations and preparation</u>
Sub: 2 Q:2.2	What information format is the most consumer-friendly?	One international logo. Generally logos are more consumer-friendly, more effective and more easily perceptible
Sub: 2 Q:2.3	From the information you listed above would this present a problem for food chain players to reveal such information?	<ul style="list-style-type: none"> ▪ It's complicated to describe on the farm effect on environment and environment effect on the product. ▪ Often the origin of the products lacks <p>Some producers may also not to prefer to declare if the product is irradiated or genetically modified</p>
Sub: 2 Q:2.4	How is it possible to demonstrate the truth of the supplied information to consumers?	<p style="text-align: center;">It's possible through...</p> <ul style="list-style-type: none"> ▪ On long-term interaction and partnership, where consumers are involved as shareholders ▪ Efficient traceability methods, for example through internet and effective auditing ▪ Crop Protection Consortium which verify the correct information in the label <p>Certification system developed with involvement of consumers and specialists because know is best for healthy diet</p>



Statement: Capacity building for the food chain is requested.

	QUESTIONS	ANSWERS
Sub: 2 Q:3.1	Do you think it is possible to overcome this gap by creating a system of training activities and capacity building to increase competences of food chain players, particularly SMEs?	<p style="text-align: center;">Yes</p> <ul style="list-style-type: none"> ▪ The training to the food enterprise management is necessary to increase the IT knowledge ▪ Information should be available for all interested, for all food chain players <p>Industry-wide initiatives to improve ICT competences could help, but there is a lack of resources in SMEs that can be dedicated to increasing company level.</p>
Sub: 2 Q:3.2	If yes, to which target do you think it should be addressed: to single enterprises or to horizontal associations?	<ul style="list-style-type: none"> • Horizontal association it should probably have more advantage since single ones have limited resources. • Horizontal association should be encouraged to provide the information and implementation expertise <p>The single enterprises participating in a horizontal/vertical/multidimensional collaboration</p>



Statement: **Whether centralised or decentralised e-platforms are better, is not a general rule.**

	QUESTIONS	ANSWERS			
			%		%
Sub: 1 Q:1.3	Does the level of horizontal co-operation influence the potential for vertical collaboration/partnership?	Yes <ul style="list-style-type: none"> ▪ The level and the way of the horizontal cooperation among players influence the vertical cooperation ▪ If all producers, all processors, all distributors, all retailers and even all consumers cooperate with each other horizontally then they can drive change vertically. ▪ But depend on the sector and the business culture of the given countries 	60	No <ul style="list-style-type: none"> ▪ Actually, really don't think that it will be possible to make a collaboration bet the players stronger enough to change the direction of information flow from horizontal to vertical. ▪ There is some between processors, distributors and consumers as they fight the common enemy 	20
Sub: 1 Q:1.4	Is greater horizontal collaboration desirable for producers/processors/retailers?	Yes <ul style="list-style-type: none"> ▪ Horizontal collaboration will work out especially in agriculture. It can also be appropriate for SMEs if it ensures the benefits in transportation, sales, such as reducing the costs, etc. ▪ A better integration would be favourable to have force to trade. 	60	Yes, but... <ul style="list-style-type: none"> ▪ only if is done in the spirit of improving quality ▪ protection on the consumer's interest not always playing its role. 	30
Sub: 1 Q:1.5	Can greater communication flow vertically overcome the need for greater horizontal collaboration?	Yes <ul style="list-style-type: none"> ▪ the communication is an important issue to reach a good result with an horizontal collaboration. It's important to respect the privacy of each actor ▪ Both flows are important and serving for the different purposes 	30	Yes, but <ul style="list-style-type: none"> ▪ Depends on the context of both the horizontal collaboration and the vertical communications flows. ▪ Depends on what information and what areas of cooperation. The e-platforms only make sense in the context of real problems/issues. ▪ It's difficult imagine either horizontal or vertical collaboration involving big retailers. 	70



Sub: 1 Q:2.3	Are centralised or decentralised platforms easier to implement in the current agri-food supply chain?	CENTRALISED because... <ul style="list-style-type: none"> ▪ with a centralised system many opportunities can be done, for example: clearer distribution of rules, faster decisions, better international organizations. ▪ Centralised system area easier to implement because they reflect the dominant position of particular actors (typically retailers) 	50	DECENTRALISED but... <ul style="list-style-type: none"> ▪ Decentralised model can be realized only if alternative physical distribution (logistic, delivery) infrastructure is added to it. ▪ Is more difficult to implement due to the need to integrate heterogeneous information systems and software. ▪ Is much slower process but probably more sustainable in the long term 	40
Sub: 1 Q:2.4	Which is the influence of the size of the players in the development of a centralised and decentralised platform?	<ul style="list-style-type: none"> ▪ Smaller size could work better in the centralised platform and big size in the decentralised platform ▪ Size is important in development of platform from the point of power and resources ▪ Size obviously helps in terms of power and resources but again if a benefit can be identified and quantified then size should be irrelevant 			
Sub: 1 Q:2.5	Are centralised or decentralised platforms providing more benefits to the market and the consumers?	<ul style="list-style-type: none"> ▪ For the market is better to have a decentralised system (better adoption to the market needs) ▪ For the consumers, instead, is better to have a centralised system (could be more efficient and provide cheaper products) ▪ Centralized retailer-dictated platform can easier ensure the uniformity and traceability of the produce ▪ The vantages of decentralised system would depend on finding good logistics/delivery/distributions solutions 			
Sub: 2 Q:1.1	Do you think a decentralised food supply chain e-platform can solve the problem of guaranteeing a high quality food production to consumers?	NO, because... A decentralised e-platform could not solve the excess decisional power wich is possessed by the retailers.	70	No, it's impossible, but... e-platforms would help to increase the flow of information, to induce benchmarking and maybe the quality of the food products	20
Sub: 2 Q:1.2	If yes, how do you think it is possible to equally involve retailers in a decentralised e-platform?	Yes, if... <ul style="list-style-type: none"> ▪ equality of their involvement should be a condition ▪ there is an identifiable and benefit 			



Statement: E-platforms as service providers.

	QUESTIONS	ANSWERS			
			%		%
Sub: 4 Q:2.4	Do you think that objective-driven e-platforms are a valid instrument for overall good economic performance within a food chain?	Yes... If one manages to reconcile the interest of different players into a common objective. E-platform as such have the potential to reduce cost trough improved supply chain system.			
Sub: 4 Q:2.5	Since the e-platform will allow improvement of business performance of the whole food chain, somehow a system should be developed for the redistribution of the value produced. Can such a system be innovative: for instance be based on the actual added value contribution of each player? Do you have other ideas on how the overall increased value added chain should be distributed amongst members of the e-platform?	Directly trough increased sales of individual companies (in case of e-market place) or indirectly trough a cost reduction thanks to their participation Profit is shared depending on the transaction volumes via the system			
Sub: 4 Q:3.10	Do you think that the possibility of a partial food chain e-platform is feasible? How realistic do you feel this is? Do you know similar situations already?	Yes... ▪ but only on horizontal level and only concerning non competitive issues such as definition of common standards and quality requirements. ▪ when retailers are separated from rest of the chain we already might have to now when very big processing plants or associations coordinating price levels or negotiating with supermarkets	70	No such chain seems very similar to the systems existing now, just with part of functions transferred from a retailer himself to a kind of a subcontractor	20
Sub: 4 Q:3.11	Could this proposal at a later stage be an instrument in facilitating the participation of the retail sector into the e-platform? In your opinion, what are the stimuli which foster retailers to join an e-platform management system?	Participations of consumers in the system might be one of the main stimuli for retailers to join			
Sub: 4 Q:3.12	3.3 Do you think that a more competitive food chain would result?	Yes ▪ The savings could be in marketing campaigns, more efficient logistics and management. ▪ If e-platform will be established once successfully ▪ E-platforms will absolutely help, but only when will be designed o address specified business objectives.			



<p>Sub: 3 Q:1.1</p>	<p>On the basis of food chain problems, in your opinion are there specific topics to suggest for better implementing ICT technologies in the food chain? If yes, what are they?</p>	<p>Yes ICT technologies can:</p> <ul style="list-style-type: none"> ▪ Be used to improve information exchange in countless areas ▪ Promoting farms and farms product to develop farm data base and farm pages which would be available to access on the internet. 	<p>50</p>	<p>But...</p> <ul style="list-style-type: none"> ▪ The food chain has special conditions as the organisation, logistics, productions, but the average consumers would not be beneficiaries too much, due to their weak and limited accessibility to ICT tools ▪ For successful implementation of ICT there should be no differences between urban and rural communities in adoption of these technologies. 	<p>40</p>
<p>Sub: 3 Q:2.1</p>	<p>In your opinion, what are the factors which push food companies to consider ICT solutions?</p>	<ul style="list-style-type: none"> ▪ Achieving better international economic competitiveness ▪ Following quality standards ▪ Be up to date with technology development ▪ Increase the efficiency and profitability (lower costs) 			
<p>Sub: 3 Q:2.2</p>	<p>What are the processes/services which can be improved by the adoption of ICT technologies?</p>	<ul style="list-style-type: none"> ▪ Quality management activities ▪ Marketing and promotions actions ▪ Customers targeted information ▪ Optimum management of transport and warehousing resources (just in time) ▪ Reducing the human error probability 			
<p>Sub: 3 Q:3.7</p>	<p>Will the supply chain e-platform end up to be an infrastructure benefiting the consumers?</p>	<p>Yes, because...</p> <ul style="list-style-type: none"> ▪ It could guide to lower prices, higher quality and safety food products ▪ This platform will benefit to all chain parts including consumers 			
<p>Sub: 3 Q:3.8</p>	<p>Which are the benefits and the dangers that the consumer can have?</p>	<p style="text-align: center;">Benefits</p> <ul style="list-style-type: none"> ▪ Better service including safer products and lower cost ▪ Better informed consumer and faster supply ▪ Additional information about products 	<p>70</p>	<p style="text-align: center;">Dangers</p> <p>In the long run companies which are not in the platform might not competitive</p>	<p>20</p>

