

**Greece – innovation 2:**

**PARTICIPATORY GUARANTEE SYSTEM (PGS)**

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[www.uth.gr/en/](http://www.uth.gr/en/)

- Location: Thessaly, Greece
- HNV system: Shepherd sheep and goat farming milk system, Potentially all HNV farming systems
- Scale of operation: On the scale of every holding (herd and parcel for forage) integrated in Terra Thessalia
- Timespan: Tool developed and implemented as a pilot project by the Laboratory of Rural Space (University of Thessaly) within the framework of the Lactimed programme between 2015 and 2016
- Keys to success: a) funding by the European programme ENPI MED, b) integration actors specialised in the services of herd management, livestock feed, diet, etc., c) new technology integration d) strengthening of small territorial chains without assuming an additional legislative certification



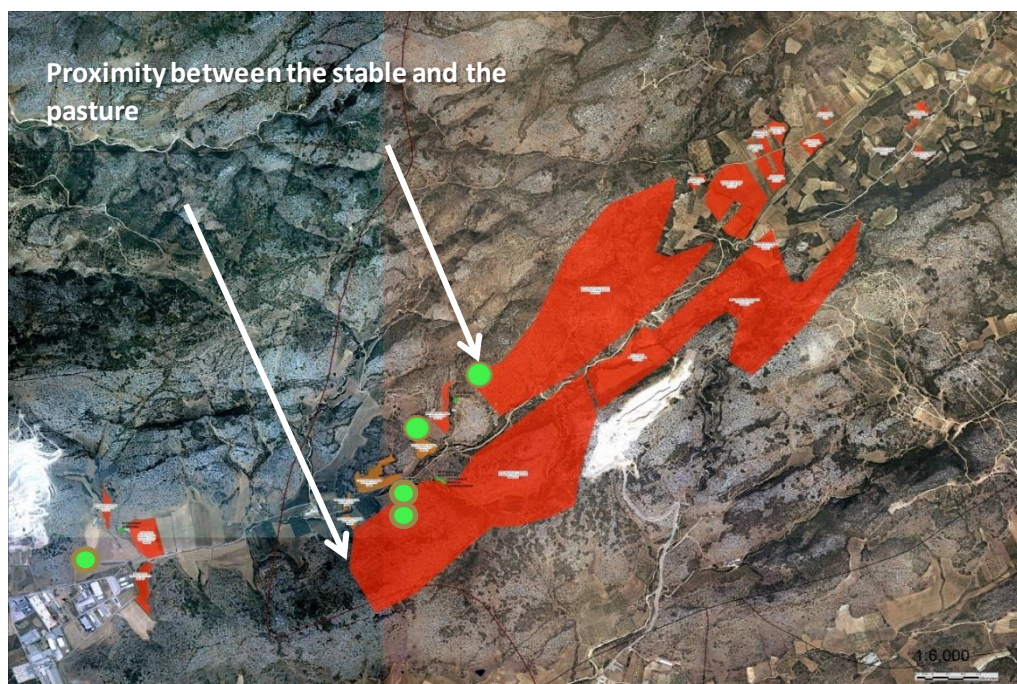
**Scale of operation**

After pilot implementation of the PGS in 15 herds (4.500 animals), its effectiveness was proved and can be now implemented in a larger scale: within a group of livestock breeders or a livestock cooperative but also within the limits of a community

**Problems addressed by this example**

- Asymmetrical power relations in the governance of the value chain of PDO cheeses (Feta cheese) do not promote the local specificities or guarantee that the characteristics of the dairy product, both inherent and extrinsic, are linked to HNVF holdings, operating thus in favor of large industrial dairies and distribution networks (oligopolistic market structures).
- Inability of the pastoral holdings, despite the high quality of the produced milk, to tackle the continuous decrease on the price of the milk and compete the intensive holdings,
- Lack of a monitoring system (herd management, local livestock feed, diet, etc) for the respect of the specifications that define the holdings' HNV character
- The asymmetry of the information relationship (particularly about the HNV character of the holdings and the "artisanal" character of small dairies) that influences the producer-consumer relationship





### Story in a nutshell

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A key objective for Terra Thessalia was to develop a way to continuously enrich and update quality claims related to place-based attributes. For this purpose, Terra Thessalia has undertaken the implementation of a Participatory Guarantee System (PGS) whose goal is to reveal and guarantee the specific characteristics of the dairy resource as well as to foster it. This System is defined as a means of utilizing the dairy resource and the HNVf. Its objective is twofold: a) to observe, support and control the implementation of the obligations that every pastoral holding has and b) guarantee at the consumers the HNV character of pastoral holdings and its sustainable links with their operating place. PGS adopts an integrated methodology that combines consultations, a monitoring system using technological tools whose data are displayed in a database and the Terra Thessalia site that is accessible to consumers. All the actors of the dairy chain and a group of scientific and technical support (interdisciplinary and technical working group) participated in its implementation

### Keys to success:

- Objectives, layout and timetables of the LACTIMED project (European programme ENPI CBC MED). The role of the working group with the support of specialists from specialized laboratories and local development agencies (organizational, scientific and technical support)
- Specialization of the Laboratory of Rural Space (University of Thessaly) in the development and implementation of technological tools in order to support educational, consultation and monitoring needs (3D spatial representation, GIS, satellite imagery etc.). These tools contributed in the function of the PGS as a support tool for the strengthening of active participation and as a technique for the creation of trust.
- Organization of regular and continuous information meetings, educational cycles and consultations
- Connection of the livestock breeders' participation in the PGS with the redistribution system of the profits deriving from the increase of the products' value
- PGS ability to support the development of a territorial Marketing
- Ability to substitute or/and supplement the certification standards by third parties
- The procedure and guarantee means have a low cost because they are based in soft rather than hard technology and in organizational innovation but also because the tool guarantees practices and actions that producer is already implementing within his HNVf.

## What does «PGS» achieve for HNV farming?

Key points :

- Effective monitoring and guarantee of the organization and function of HNV livestock farm units
- Producers' active participation in issues a) farm unit managing and b) documentation of the HNVf character
- Successful pilot application in 15 sheep and goats herds (4.500 animals)



### *General achievements of the action*

- A guide (methods, tools) for diagnosis, evaluation and guarantee procedures
- Educational material in order to train farmers and producers to actively participate in the guarantee of the HNVf-product relationship
- PGS contribution in the development of a territorial marketing for the promotion of HNVF products in niche markets under the Terra Thessalia label

### *Does it improve the socio-economic situation of HNV farming? examples*

It is an information, education and training tool for the producers on issues of HNVf improvement and management. At the same time, it functions interactively as a forum where producers and researchers/technicians can meet and exchange knowledge and experiences, familiarizing at the same time producers with the knowledge and use of new technologies. PGS contributes to the promotion of the value of products produced by HNV holdings and indirectly in the viability of HNVf production unit. Its pilot application has proved its contribution through the expression of interest on behalf of markets and consumers

### *Does it maintain or improve HNV values? Examples*

PGS as a basic guarantee instrument for the connection between the quality of the product and holding's HNV characteristics, a connection that promotes to consumer society, it contributes to the recognition of the value of the HNV dairy product. This is a two-way process so that consumers and producers can actually understand the importance of local breeds, grazing and traditional practices

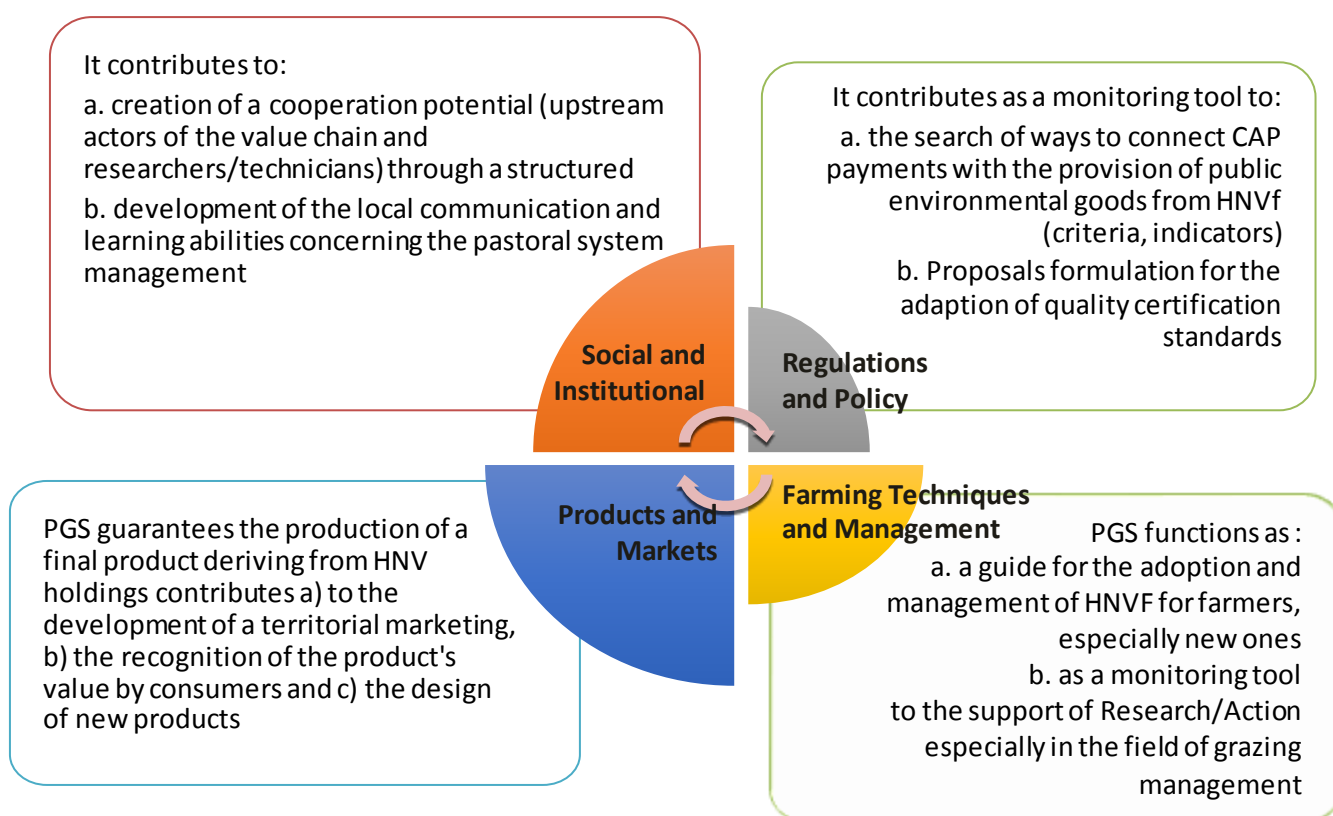
### *Does it include conservation of nature values as an explicit objective?*

PGS was implemented only in HNVF holdings (only pastoral herds with local breeds) following TERRA THESSALIA's marketing policy which is based on preserving and promoting the HNV character of its collaborating holdings production systems. The charter signed by the small dairy territories, explicitly mentions the respect of the objective above and the adoption of a redistribution system in favor of the bodies that are involved with specific actions in preserving the HNV character of those production systems.

Could the innovation be made more directly beneficial for HNV farming and nature values? If so, how? HNVF can directly benefit by the implementation of the tool because it also functions as an adoption guide of HNVF by the new entrant farmers. What is more PGS funding will reinforce its capacity to broaden and deepen the guarantee fields and promote more effectively the HNVF image and the multifunctional role of farm units, helping thus to better inform consumers on the value of HNVf and the products it produces. The cooperation with collective territorial bodies (e.g. PINDOS initiative) that represent HNVf areas can utilize PGS as a policy tool (monitoring, control and reward of services and also support of a wider marketing strategy). Technically, strengthening this role of the PGS is possible without a big cost. It is necessary to strengthen the technical support group, implement a diagnostic study for every area or group of holdings, secure a specialized training (registration of information, use of technological tools etc.). Finally, this tool can also be used for the development of pastoral tourism as an important promotion part of HNVf values.

Already, the collaborating laboratories within the framework of Terra Thessalia aim to enrich PGS with criteria and indicators that will promote on one hand the relationship between biodiversity and HNVf (grazing management plans, ecological corridors, hedges etc.) and on the other hand the research promotion for the relationship biodiversity and farm unit productivity.

### How does «PGS» respond to the HNV LINK innovation themes?



In the category “Social and Institutional”, PGS works as a new cooperation form which ensures that all the actors of the value chain and the research/support group will meet aiming at the bottom-up capture, planning and implementation of ways and means that will guarantee the holdings' HNV character.

In the category “farming techniques and management”, PGS functions as a diagnosis and monitoring tool of the holdings' organization. It gets support thus from technological tools, its multidisciplinary team (zootechnicians, range scientists, informaticians, facilitators etc.), the provided education and frequent and regular meetings that tend to establish. The use of new technological tools functions also here as a means of strengthening the capacity and ability of actors, especially livestock breeders, to actively participate in the diagnosis and planning of spatial interventions, a fact that facilitates cooperation with experts and public services.

In the thematic “Products and markets” PGS contributes to the promotion of HNV territorial resources and products, based on new spatial representation technologies, multi-media etc. PGS, with the tools it uses, can locate and guarantee elements and practices that can attribute to the product properties and characteristics connected to HNVF (e.g. spring grazing milk, movement, high-quality pastures etc.). These data are then used to shape the label and enrich the promotion message (visual and written). The innovative role of PGS is reinforced since it also functions as a two-way route of exchange, contacts and navigation in the world of HNVF for consumers.

In the categories “Regulations and Policy”, as well as “Products and markets”, PGS contributes to the issue of the necessary adaptation of certification standards to the small scale specificities based on the experience of active participation of the directly and indirectly involved actors in the production procedure of the raw material and final product. These specification standards can also complement the control generalizations and weaknesses of the standards offered (or imposed) by third parties.

The increase in the value of the products promoted by PGS and the activation of RDP measures will contribute to the better and more balanced contribution of PGS in thematic concerning innovation - especially in the thematic Regulations and Policy and Farming techniques and management - as a diagnosis and monitoring-control tool of the holdings' HNV characteristics and their relationship with biodiversity with the potential to enrich relevant criteria and indicators in the scale of the holding and the community.

### **The process that made it happen and critical factors for success**

- Project and technical support team
- Identification of elements directly linked to the relationship of the final product and HNVF and which can be guaranteed by the PGS
- Organization of training, consultation and implementation of action cycles for the producers by utilizing new tools
- Implementation of PGS with a monitoring form for the control, guarantee and supply of the territorial marketing



*Actors and roles: who made it happen, who talked to whom, what roles were played by each key actor?*

The driving force was the Laboratory of Rural Space, University of Thessaly and the multidisciplinary team that was formed with the participation of the Agricultural University of Athens (milk sector, pasture management, organization of the livestock farms etc), Panteion University of Athens (label, certification, PDO, PGI, marketing) and the local Development Agencies. The first actor, the Laboratory of Rural Space, contributed with the development of technological tools concerning 3D spatial representations, territorial diagnostic etc. Next, the implementation team was organized with the participation of researchers and technicians from those institutions and members of livestock cooperatives, small cheese makers that keep their artisanal character. After that there was a series of regular and continuous information meetings, training cycles.

*Institutional context that made it possible*

The institutional entity of Terra Thessalia and the institutional recognition status of the operation of some research laboratories as certification centers

*Resources: funding, staff etc*

The progress of the programme was made without problems due to funding from the ENPI MED

*Processes*

The building process that was followed concerns 3 sectors:

- Organization and implementation of PGS : a) creation of a project team that integrates the services of the actors involved in the fields of research, organizational and technical support etc., b) definition of guarantee sectors and fields that are linked to the HNV characteristics of the area and the holdings and refer to environmental values (print, sustainability, HNVF etc.), c) creation of an integrated diagnosis and guarantee methodology (sources, methods and integration of technological tools developed and adapted by LPS) and d) organization of regular and continuous information meetings, training cycles and consultations.
- Evaluation-Guarantee : a. implementation of a monitoring system, b. storage and processing of data in a database-portal at the University of Thessaly, c. issuing guarantee certifications for every thematic (grazing, management, local breeds practices, origin of forage, HNV level etc.)
- Supplying a "territorial" marketing for the promotion of its basic products in the market: a. data on quality and identity characteristics of the final products, b. integration of these elements in the label and packaging shaping and also the promotion message (visual and written)

*Critical factors for success: opportunities, threats, timing, individuals, continuity...?*

The intensification of competition (expansion of the dairy companies and intensification of livestock holdings), the economic crisis, the failure to organize the feta PDO status in national level so that a higher value can be secured were the main factors that favored the adoption of PGS of the different actors in the value chain. New opportunities arise by a) the fact that despite the crisis consumers are turning to local and Greek food products (value for money) and b) the forthcoming activation of RDP measures (creation of Label systems, actions to strengthen biodiversity etc.) Also, new entrant farmers will play an important role in the adoption of PGS due to their orientation towards HNVF and the production of territorial products. The redistribution system adopted in the framework of Terra Thessalia reinforces the role of PGS making it necessary for producers while it secures recognition among consumers. This responds to the new expectations by an increasing part of the consumers that link the quality and the identity of the product with HNV systems and areas.

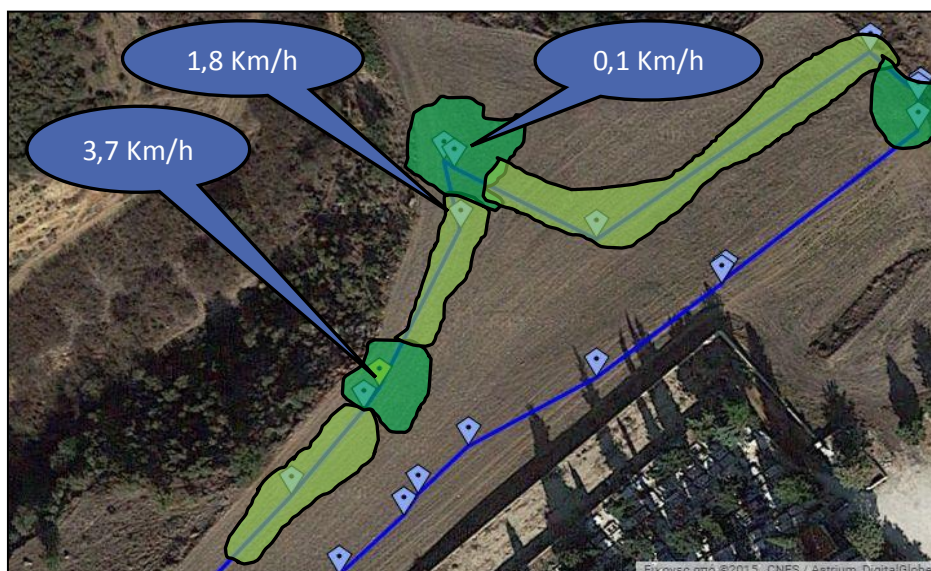


*Limiting factors, actual/potential problems, and how could they be overcome?*

The adoption of the tool by an increasing number of producers depends largely on the response of consumers and markets. It is necessary to continuously improve and adapt the technological tools on monitoring and control issues. Also the expansion of the tool creates the need to expand the members of the scientific and technical team as a response to the continuous emergence of new research, evaluation (pasture quality, endemic plants, nutritional characteristics of plants etc.) and guarantee fields. Finally, delays in the activation of national and European funding tools (e.g. RDP) is the main restrictive factor. However, as the value of the promoted products in quality markets increases, at the same time the possibility of at least self-financing the PGS application will also increase

**Lessons learnt from this innovation example, and its potential replication**

- The ties between products and HNvf can be substantiated by producers themselves if they are provided with means, training and support
- The functional incorporation of adjusted technologies in PGS transforms them into popular communication and learning tools
- The recognition of the value of HNvf products by the market upgrades the value of HNvf itself in the eyes of consumers, producers and local actors



**Figure X** Utilization of animal speed in order to identify high quality pastures

*Overall lessons from this example, especially from point of view of HNvf farming?*

If we adapt and integrate new technologies (GPS, 3D, Internet, satellites etc.) in a functional and targeted tool they can become a great instrument of a) informing, raising awareness and training producers and processors, b) farmers' active participation in control and guarantee systems of their holdings' HNvf characteristics. In this case due to these technologies PGS transforms into an interactive tool that allows also the participation of local consumers (taste control, respect of traditional techniques, ethical aspects linked with the processing phases of the final product) reinforce the effectiveness and legitimacy of PGS

Local actors' participation in documenting and guaranteeing the specificities of a territorial resource (HNvf), aiming at informing consumers and supporting a competitiveness based on discretion, is more effective than certification systems by third parties.

*Is the innovation unique to its territory and its characteristics, or is it replicable in other areas?*

Expanding PGS is easy and relatively inexpensive due to the immaterial technology that is used. Its implementation in other areas requires above all the agreement between producers and one or more cheese-makers, then securing a technical coordination and monitoring body for the implementation of the PGS and the utilization of its results. The tool can be applied to all types of agri-food.

*Could it be rolled out on a bigger territorial scale?*

PGS can be applied in the scale of the holding, the team of a cheese-maker's holdings, the community and the LA

*What would be needed to do this successfully?*

Training the participating producers, creation of a central support group and small thematic structures of technicians and researchers (pastures, ration, local breeds etc.). Utilization of RDP funding tools.







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