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ABSTRACT

This paper investigates the degree to which Greek butchers try to come to grips with the implications of long term modern trends. The “traditional butcher versus modern supermarket” conceptual dichotomy is a dead-end for the former. In order to meet the long term challenges of contradictory consumer behavior trends, Greek butchers must embrace them and use them to their own advantage, rather than resist them. The paper deals with issues of innovation adoption by the sector, emphasising the role of the sectoral collective institutions that act as the collective consciousness of their constituents and can hinder or facilitate innovation diffusion.

Keywords: Conservative Disposition, Convenience Food, Cooking, Customer Trust, Greek Butcher, Greek Housewife, Innovation, Social Network

INTRODUCTION

Then my most earnest advice to you is not to keep it going any longer ... How long have you been playing with fire? (Uncle Vanya advising his brother not to invent fire, in Roy Lewis’ The Evolution Man)

The purpose of this paper is to set the groundwork for the investigation of the degree to which Greek butchers try to come to grips with the implications of long term modern trends of meat consumption that gradually turn clients towards supermarkets and away from traditional neighborhood butchers. The issue is viewed through the entrepreneurial versus conservative disposition dichotomy and is informed by the present day economic crisis, which forms the backdrop against which the story is unfolding.

By now it is clear that the economic crisis we are going through is not going to have the asteroid impact that wiped out the dinosaurs, large and small. It is highly probable however that, at least in Greece, it will on the one hand leave behind a trail of ruined small business as it reduces the disposable income of lower and middle classes, and on the other hand will usher in an even more hectic life-style as it dismantles the public sector. Against this background, our subjects are a group of shop-owners that do not possess any of the kudos of high-tech

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SMEs nor are they expected to spearhead the recovery of the economy; in fact their job is a very prosaic one, butchering carcasses and selling meat. Our primary research subjects were seventy SME clients of Provil S.A., a food ingredients producer. Their mundane job however and their embeddedness in the local society – which makes them representative of many small enterprises - offers no protection from the developments set in motion by globalisation. So, is the Greek neighborhood butcher on his way to joining the gallery of lost traditional professions like the travelling knife-sharpener and ice-cream seller?

The proposition of this paper is the following: The “traditional butcher” versus “modern supermarket” conceptual dichotomy that dominates at present the sectoral discourse is a dead end, because it implicitly stresses the personal relationship and trust between shop-owner and customer without actually enhancing and utilising it to accommodate evolving customer needs. In order to meet the long term challenges of contradictory consumer behavior trends, such as the dominance of convenience food and health concerns, the Greek butchers have to embrace them and use them to their own advantage, rather than resist them.

THE SETTING

In the value chain linking the farm to the plate, butchers traditionally position themselves as experts of carcass selection and curving that can be trusted by their customers, who lack that expertise. The traditional Greek housewife on the other hand, historically the butcher’s main client, positions herself in “the historically consolidated role” of the cooking specialist, proud of her skills and her social role in the family context (Sarri & Trihopoulou, 2005). The cooperation of these two covers the whole value chain and thus has developed over the years into a strong interpersonal bond, based on trust and inter-dependence.

The predominantly conservative nature of Greek eating culture (Wright, Nancarrow, & Kwok, 2001) has elevated the trust bond to an effective barrier against the domination by supermarkets of the fresh meat market; about 70% of the market is still served by ‘traditional” butchers (Bourlakis, Ness, & Priporas, 2006). Without going into too much detail, we could say that until recently, irrespective of the type of retail outlet utilised, the desired end for the Greek client was fresh, healthy, nutritious and tasty meat at an affordable price.

The super market environment attempts to meet this end by means of standardised packaging and labeling; this approach is backed by an ever increasing amount of legislation at European level. The client is thus called to use her rational, label-decoding abilities, augmented by inherent sensorial cues, to make a solitary, unaided choice (West, Larue, Gendron, & Scott, 2002). The available international empirical research seems to indicate that this approach is not wholly satisfactory and that clients tend to be uncertain of their sensorial ability to choose and confused by the labeling systems available (Barnhart, 2005; Rimal, 2005). Be that as it may, in the modernist Western urban societies, most clients tend to have a few alternatives; thus, developing ever more detailed and reader-friendly traceability and labeling systems is more or less a one-way street.

The “traditional” Greek butcher on the other hand, meets the above mentioned basic needs by offering social persuasion; he (and it is invariably a male role) is a trustworthy specialist who protects his clientele from unsafe choices. The persistence in modern Greek language of the tradition-laden Turkish “kasap” against the neutral sounding alternative of “kreopolis” (which literally means meat-seller) and the continued presence of the young “kasap” figure as the amorous macho male in Greek popular songs, are indications of the historical depth and resilience of the butcher – housewife habitus.

In this habitus, quality assurance is not offered by an impersonal control system but has a specific face and usually a smile. By placing her trust (Wood, Boles, Johnston, & Bellenger, 2008) on the butcher rather than on the supermarket, the Greek housewife rejects
the silent objective in favour of the eloquent subjective. It is really very difficult for her to articulate rationally the causes of that trust; a 2007 market research on behalf of the Association of Butchers of Thessaloniki is revealing in this respect: asked why they trust their neighborhood butcher, 47.8% responded “just because” and a further 39.8% “because I’m certain I buy quality meat”, a fine example of cyclical reasoning. Shopping for meat in her neighborhood remains part of the social network of the Greek woman, where she can interact with others as the sovereign of her household, rather than as the disenfranchised individual we usually call a “customer”. Not surprising then, a sovereign - expert interpersonal bond is created, a bond which the former party loathes to let go. Even if an individual butcher displeases or betrays her, the sovereign will replace him by another, rather than forego the type of relationship itself.

This bond however is under pressure from two sources. On the one hand most of the meat consumed in Greece these days is imported, thereby undermining the butchers’ claim to carcass selection specialty. Even though only about half of the consumed meat is locally produced (European Commission, 2003), consumers tend to be nationalistic (Chryssochoidis, Krystallis, & Perreas, 2007) and somehow most butchers manage to offer ‘Greek grown” meat. Unavoidably, there is a nagging suspicion among consumers that their beef was fattened in a French stable, rather than raised on the Greek hills; still, this suspicion has not totally undermined the trust bond yet, and many a conversation end with the faith proposition that “my butcher is not like the rest”.

On the other hand, present day Greek women are income earners, as much as mothers and wives, trying through the everyday hustle to balance the conflicting demands of this multiplicity of roles on their limited time and energy. The sovereign housewife of old is being increasingly replaced by the stressed working woman who has to rush home, take the kids from school and prepare dinner, usually without the support of the extended family. This individual, has not lost her identity as the mother-figure responsible of the proper nutrition of the family, far from it, but lacks the time and often the skills to engage in lengthy shopping (Reed, Mcllven, & Strugnell, 2000) and elaborate cooking respectively (Lyon, Colquhoun, & Alexander, 2003).

The lead in this direction comes, not surprisingly, from the United States, where “convenience, in terms of reducing or eliminating the amount of food preparation needed to serve a meal, is a trend that is likely to continue over the next decade” (Food Navigator, 17/06/2010). The pressure seems to be stronger on households with two working parents (Food navigator, 09/09/2009) and has proven resilient to the pressures of the economic crisis (Food Navigator, 31/08/2009). We can safely say however that the trend has already reached the Greek society and is likely to stay, even if its intensity is lower than that found in other, less traditional, Western societies.

Does the above reading of the exiting situation mean that convenience is the dominant trend in modern family meal decisions? The answer is no, things are much more complicated because “food is culture” (Montanari, 2004) and being a beaten renegade of one’s social role is not a comfortable cultural identity for any subject. The public discourse on food today seems to evolve around the themes of affordability, healthy eating, as well as national and gourmet cuisines (Bugge, 2003). The popularity of these themes is attested by the rich offering of Greek TV programmes, lifestyle magazine articles, weekend newspaper supplements and the like.

Economy then, in terms of both shopping and cooking time becomes a paramount constraint; a constraint which makes life poorer and for which the subject is likely to feel resentment, which in turn could be transformed into gratitude for whomever assists her in coping with it without sacrificing her social roles. In short, we propose that meeting the added needs of, on the one hand saving time in terms of planning, purchasing and preparing the weekly family meals, and on the other hand facilitating participation in the above mentioned discourses is the new challenge for Greek butchers if they
are to defend successfully against the encroaching supermarkets. The question of course is: do they see this and if so, are they willing to take steps in that direction?

TRADITIONALISTS AND CONSERVATIVES AS RELUCTANT INNOVATORS

The protagonists of this paper are the numerous small butcher shops in the wider region of Thessaloniki and Northern Greece; these are mostly papa-and-mama operations, often handed down to the next generation and organised in geographic Associations. Our empirical research took place just before the economic crisis was about to get hold of Greece and in this sense it offers us a picture of the mental terrain of the sector as it was about to take the plunge with the rest of us.

It is of course established wisdom that in order to overcome the crisis, businessmen must develop a strong entrepreneurial orientation; after all, if you want to get over the hill you apply the accelerator and not the breaks of our car. Is however entrepreneurial orientation prevalent among SME owners? Apparently not, for many owner/managers, their foremost entrepreneurial act was to establish their company, followed by an essentially conservative business attitude. In the entrepreneurial versus conservative orientation dichotomy, the existing bibliography favours heavily the ideal at the expense of the actual.

There are a number of studies in the fields of politics and psychology examining the psychological factors underlying the propensity of people towards conservatism. Jost, Glaser, Kruglanski, and Sulloway (2003) for instance relate conservatism to, among others, intolerance of ambiguity and uncertainty and need for cognitive closure and structure, while Cornelis and Van Hiel (2006) identify the need for predictability as a contributing factor. Useful as they might be, it is difficult to draw practical conclusions from such studies. To start with, not all types of conservatism have the same psychological antecedents (Crowson, 2009); but more than that, we cannot discourage a person from opening his own butcher shop if his psychological profile is not supportive to entrepreneurial behaviour, nor can we draw much comfort from a predictive proposition that those with the wrong profile are less likely to survive the present crisis. One has simply to resign to the reality that most people, most of the time, adopt a conservative attitude towards many of the issues they are faced with. Given that, we should seek to come up with proposals that would assist the conservative majority to survive this and the future crises with as few losses as possible. It is perhaps worth reminding ourselves here that a crisis is not only an unstable situation of extreme danger, but also a point of time when decisions must be made.

So what is a conservative disposition? To answer this question we will turn to Michael Oakeshott (1991), the foremost British conservative thinker. He understands the conservative disposition as a propensity to use and enjoy what is available, rather than to look for something else or new; as an appreciation of what exists, rather than as a wish to gain what might be. This appreciation of, and thankfulness for, the present is anchored on the warmth of familiarity, rather than on admiration for antiquity per se. It follows from this definition that the strength of the disposition depends on the condition of the present and the past for the subject; if the present has little comfort to offer the conservative might look to a, real or constructed, better past for a more firm footing. If on the other hand the present is pleasant (or tolerable) but appears to be in danger, the conservative disposition is likely to be strengthened. To be conservative therefore, is to be content– not necessarily happy – with one’s existence, and surely most of us are content with at least some aspects of our private or public life and in this sense conservative.

Change is of course unavoidable, but for the conservative person regrettable, in so far as it deprives him of something he had learned to enjoy and presents him with something else to
which he has not attachment. Small and gradual change in a predictable direction is consequently more palatable to the conservative, as it gives him the time to assimilate it and does not entail the threat of destruction of valued aspects of the present; while large, abrupt and open ended changes are perceived as threatening.

Resistance to change however cannot be elevated to the cardinal characteristic of the conservative disposition, for as we have said change is unavoidable. It is the mode of accommodation to change that gives us the real mark of conservativism, and here the conservative thinker meets the post-modernists. For change represents a threat to identity, and for Oakeshott identity is nothing more than an unbroken rehearsal of contingencies, this concept is not dissimilar to the idea of identity as a consistent self-discourse.

So, in what way does a conservative differ from a traditionalist? The latter experiences his identity (personal or professional we may say) as a castle in which he has to retire and which he has to defend from the onslaughts of change, the only alternatives being preservation as-it-stands or destruction; the former sees the defense of identity as an open field combat, with tactical retreats that absorb the worse of the impact and small counter attacks that gradually succeed in neutralising and eventually assimilating the foes.

In other words, the conservative might not be an ardent innovator himself, but he will accept - after close scrutiny - innovations as a means of preserving the essence of his identity, provided that the cost-benefit balance is demonstrably favorable and that the unintended changes that always accompany any innovation are to some degree foreseeable and limited. In short, the position of a conservative vis-a-vis innovation will be informed by the central consideration that a known good is not lightly to be surrendered for an unknown better.

Writing these lines, I cannot help remembering my grandmother, who was proud of her traditional tomato sauce with olive oil, oregano and basil. For her, this was the quintessential Greek sauce to be spread over steaming spaghetti and any attempted innovations on this recipe were frowned upon; little did it bother her that the tomato was introduced in the Middle East around the 19th century and that the idea of Spaghetti reached her via Italy. I guess that if she were around in the 19th century, she would treat tomato like an exotic fruit suitable only for pretentious aesthetes, much like she treated the avocado with shrimps prepared by her granddaughter for our 20th century feasts. At any rate, in classic conservative fashion, the novelty of tomato was slowly assimilated in Greek cuisine once a way was found to use it in a familiar way of cooking.

THE PROTAGONISTS

At the time that the empirical research was carried out, our sample of butchers had reasons enough to be content with the performance of their shops, but there were also some worrying signs in the horizon.

Asked about the trend of their revenues in the last three years, 69.80% reported growth, 23.80% static sales and 6.30% a decline in sales. Of those reporting growth, 88.4% were satisfied with their present performance and only an entrepreneurial 11.6% reported unsatisfied. Even more tellingly perhaps, of those with static sales, 53.3% were content enough to report satisfied; a figure that naturally dropped to 25% for those few who reported falling sales. Taken altogether, the above figures do not paint a picture of a group with strong entrepreneurial impulses, but rather one that is happy to ride the long term wave of increased meat consumption by the Greek households.

Turning our attention to the issue of performance in terms of profitability, the percentages of the sample reporting growth drops to 41.70%, while the majority report static (48.30%) or declining (10%) profits. Again however, a majority of 52.50% of the respondents reported satisfied with their performance.

In fact, there is a small group of five respondents, accounting for 7% of the total sample, who report satisfied with their static...
sales and profits. We could say that these are the nonchalant conservatives, content with their lot in life and happy to keep on doing in the future what they do at present and has served them adequately in the past. A similar in size group reports dissatisfaction despite growth in both sales and profits; these are the hardcore entrepreneurs, more interested in their potential rather than their actual performance. Of more interest to us, are perhaps the twenty individuals, accounting for almost 29% of the sample who reported increased revenues and static or falling profits; these are the retailers who were unable to retain their share of the added value chain under pressure from their suppliers, these therefore are the people who could be swayed either towards a defensive, traditionalist, behaviour, or towards the adoption of innovations that could improve their performance.

For the purposes of this paper, innovative behaviour is the introduction of semi-prepared meat dishes in the offering of the butcher shop, apart from the traditional butcher sausages; hence the sub-title “think meal not meat”. The degree of adoption of the innovation will be measured in terms of the percentage of total revenue that these artifacts represent.

As we can see from Figure 1, the average revenue from semi-prepared dishes is just under 25%, but the curve is skewed to the left and there is no a normal distribution. The median is 20%. Overall, 43.10% of the sample report less than 20% contribution to sales, the same number report contributions between 20 and 40% and 13.8% of the sample report contribution of over 40%.

By tabulating the degree of innovation adoption with sales and profit trends and satisfaction, we can see that the relationships are not linear.

One thing that stands out from Table 1 is that the middle group - one that we could call the “reluctant innovators” - seems to be doing considerably less well than the non-innovators both in terms of sales and profitability trends. On the other hand, the third, smaller, group - which we shall call the “enthusiastic innovators” - is doing much better than the rest. Based on the above, one could say that, while the conservative, reluctant innovators are dissatisfied with their present performance and trying to find a solution, their over-cautious approach is not paying off. The degree of reluctance to embrace innovation of this group is highlighted by Table 2 which tabulates the perceived need to modernize with the contribution of artifacts to the overall revenue.

As we can see, the less than 20% group, which has not made significant moves to innovate at this stage, is on the whole willing to contemplate a response to changes in the environment, with over 76% responding Yes or probably Yes. At the other end of the spectrum, the enthusiastic innovators, even though they are presently performing better than any other group, see their present situation as one of continuous change. The reluctant innovators however behave exactly as Oakeshott would expect them to; they have taken a relatively small step and are waiting to see its results before committing to a new one.

The obvious next question is: what is it that these groups expect to achieve from innovation? The answer is the same for both reluctant and enthusiastic innovators. They expect to differentiate themselves from the competitors, increase their profitability, expand their customer basis, increase customer loyalty and lastly increase their revenues, in that order of significance.

If as we’ve seen the motives of both groups are similar, what is it that differentiates them in terms of their success in improving performance? The answer seems to be their ability to secure a strong local clientele basis and establish a reputation that can attract customers from outside the normal trading area of a neighborhood butcher.

As we can see from Table 3, the reluctant innovators are the only ones who have not secured a strong local following but rely on custom from the wider area; this in turn makes them more vulnerable to competition from supermarkets, who offer the convenience of one-stop shopping. They have to resist that pressure and since their differentiation efforts have been half-hearted, they probably resort to price
competition, hence their low profitability. The enthusiastic innovators on the other hand, not only have secured a strong local basis, but are also able to attract customers who are willing to travel by car to reach them.

In order to find out how well the different groups deal with the challenges of persuading their customers to take up the new offerings, we’ve asked them to prioritize the sources of customer resistance; the results are shown in Table 4.

As we can see, the hierarchies of obstacles are quite different. The enthusiastic innovators have been able to overcome resistance to taste (the difference between a professionally and a home prepared marinade for instance) and their main challenges are to persuade customers about the meat quality of the artifact and of course to persuade the customer to accept a rather inflated price tag. The reluctant innovators on the other hand are still struggling to persuade their customers to try the new idea and to fine-tune the taste of their artifacts.

Viewing the issue through the lens of the innovation diffusion theory we could say that our reluctant innovator group has taken the first three steps of the Rogers’ model (MacVaugh & Schiavone, 2010), are currently in the implementation stage and considering their options about the final, confirmation, stage. The findings of Table 2 are not very encouraging about the prospects of this group deciding to intensify the innovative effort before reaching its final conclusions. Thus, it would not be too adventurous to hazard a guess that given their mixed results up to this stage and the propensity of people to become more conservative in conditions of crisis, at least part of this group is likely to abandon the innovation in the near future. Doing so, would throw these shop-

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**Figure 1. Revenue from semi-prepared meat dishes**

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**Table 1. Revenue source and revenue and profitability trends and satisfaction**

<table>
<thead>
<tr>
<th>revenue source</th>
<th>revenue growth%</th>
<th>revenue satisfaction%</th>
<th>profitability growth%</th>
<th>profit satisfaction%</th>
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<tbody>
<tr>
<td>from artifacts</td>
<td>Growth</td>
<td>Static</td>
<td>Decline</td>
<td>Yes</td>
</tr>
<tr>
<td>0- 19%</td>
<td>73.68</td>
<td>21.05</td>
<td>5.26</td>
<td>77.78</td>
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<tr>
<td>20- 40%</td>
<td>72.73</td>
<td>18.18</td>
<td>9.09</td>
<td>66.67</td>
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<tr>
<td>over 40%</td>
<td>85.71</td>
<td>14.29</td>
<td>0</td>
<td>100</td>
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owners back to the perfect storm of Porter’s five forces without a compass.

At this stage we should make it clear that we do not claim that widening the product range offering is a one-size-fit-all proposition; it comes with both internal and external prerequisites. The external prerequisites are related to the geographic location of the shop and its catchment area. As Zizek (2009) warns us, every perspective has a blind spot; by focusing on the conservatism of shop-owners we should not become oblivious to the conservatism of customers. It is more than likely that clients from certain social backgrounds will simply refuse to adopt the new offering; butchers that cater largely for such clientele will find our proposal irrelevant. A number of traditionalist shop-owners that are doing quite well and are content with their performance could well be long in this group, so could some members of

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<th>Table 2. Perceived need to modernize</th>
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<tr>
<td>% of revenue from artifacts</td>
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<tr>
<td></td>
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<td>less than 20%</td>
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<td>20-40%</td>
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<td>41% over</td>
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<th>Table 3. Customer distribution</th>
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<tr>
<td>% of revenue from artifacts</td>
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<td>41% over</td>
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<th>Table 4. Sources of customer resistance reported as very important</th>
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<tr>
<td>reluctant innovators</td>
</tr>
<tr>
<td>resistance to novelty 63.6%</td>
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<tr>
<td>resistance to taste</td>
</tr>
<tr>
<td>resistance to price 50%</td>
</tr>
<tr>
<td>resistance on suspicion of meat quality 35.7%</td>
</tr>
</tbody>
</table>
what we have called the “reluctant innovators”,
who in reality could be hapless innovators.

Turning our attention to the internal pre-
requisites, apart from the fundamental issue of
shop size, we will now focus on the required
new identity of the shop owner as a chef-expert
and consultant of the end client. Could it be that
our reluctant innovator is also a clumsy one?
The continued resistance of their clients to the
novelty of semi-prepared meat dishes could
reflect just that. Let’s see this from the point of
view of the customer, presented with, let us say,
mariated pieces of pork mixed with chopped
red, yellow and green bell peppers and herbs,
ready to pop in the oven for a mouth watering
stew. What does she see? She is supposed to
see time saved and a well fed, content family.
What doesn’t she see? She doesn’t see the colour
of meat, nor can she smell it. She is deprived
of her sensorial ability to examine the food.
The bond of trust between her and her butcher
should be enough to compensate for this loss,
but that bond was built on different premises,
trust is not blind faith.

To alter the balance of the cost-benefit
calculation in his favor, the innovative butcher
needs to add to the benefit side by shifting his
position along the farm-to-plate chain and
come closer to his clients with a combination of
product and service offerings. He must become
a persuasive chef-expert; he must develop new
core competencies. In this sense, we must take
exception to the claim of Wolf and Pett (2006)
that the impact of process innovation can be
evaluated separately from product innovation.

If the above line of reasoning is correct, then
the diffusion of innovation among the Greek
butchers cannot be based simply on imitation
and should be best examined using a structural
model (Troshani & Doolin, 2007). The difficulty
lies in the required combination of offering a new
bundle that includes both products and services,
a bundle that cannot be supported by the old
competencies of carcass selection and cutting. In
this context, one should not ignore the potential
significance of the presence in the outlet of a
butcher’s wife; after all, she is likely to possess
the cooking skills that her husband might lack,
and as a figure she can be the symbolic linking
pin between the display fridge and the home
oven. In addition, the neighborhood butcher
would do well to take a leaf from the book of
their supermarket competitors and develop
point-of-sale-promotion skills (Petrak, 2002).

Acquiring the above bundle of skills in
order to engage in innovation adoption with a
reasonable chance of success, is not something
that we can hope that will develop spontane-
ously and in time among a sufficient number of
individual shop-owners. If we want to adopt an
interventionist approach, we would have to turn
to the institutional leadership, as the collective
consciousness of the sector, for entrepreneurial
orientation. The Butchers’ Associations, inside
the framework of the Small Business Chambers
in which they belong, are the only nodes in the
sectoral network that have both the centrality
and the salience to speed up the diffusion of
innovation. Alternatively, the job will be left
to the food ingredient companies, who educate
their clients in an effort to boost their sales.

Unfortunately, at this stage we have no
evidence to indicate that the Associations are
moving in this direction. The market research
mentioned above for instance was designed to
confirm the existing “traditional” identity of
neighborhood butchers and their contribution
to the traditional needs of Greek households.
What we propose is that the institutional leader-
ship should articulate on behalf of its members
an enhanced version of the role that they were
always playing in the fabric of the traditional
neighborhood. This role definition should centre
on the concept of the socially embedded firm and
place emphasis on the co-creation of knowledge
with the customers. In addition, even though
location is still a paramount factor, the sector
should broaden its understanding of the spatial
“neighborhood”, which is gradually losing its
social dimension in Greece as everywhere else
in the Western world, and start including in its
vocabulary the concepts of virtual communi-
ties of interest.
REFERENCES


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