Targeted survey for the impact assessment of new legislation on New Genomic Techniques

This is a targeted survey for the Impact Assessment of new legislation on New Genomic Techniques. The aim of this survey is to gather your input on the various impacts of elements for future policy options for the legislation on plants produced using genomic techniques (NGT). This survey is part of the "Study supporting the impact assessment of legislation for plants produced by certain new genomic techniques" commissioned by the European Commission (DG SANTE) to an independent consortium of policy research bureaus led by Technopolis Group.

Dear {TOKEN:FIRSTNAME} {TOKEN:LASTNAME},

Welcome to this survey to gather your input on the various impacts of elements for future policy options for the legislation on plants produced using certain new genomic techniques (NGTs). This survey is part of the "Study supporting the impact assessment of legislation for plants produced by certain new genomic techniques" commissioned by the European Commission (DG SANTE) to an independent consortium led by Technopolis Group.

In this survey we present various changes that could be envisaged regulating specifically **plants developed through targeted mutagenesis (TM) and cisgenesis (CG)**. Thus, from the many techniques that NGTs cover, any reference to NGTs in this survey is understood as TM and CG only. For each potential element for policy options, we ask you to assess their potential positive or negative specific socio-economic, health and environmental impacts in the period 2030-2035. In addition, we ask you to provide information on costs and benefits.

Completing the survey will take 45-90 minutes of your time, depending on your level of expertise. The survey must be completed online, but a printable copy (/upload/surveys/959299/files/PrintableSurveyTest.pdf) of all questions can be downloaded as PDF (/upload/surveys/959299/files/PrintableSurveyTest.pdf)prior to providing your response.

This survey is different from the open public consultation. It gathers in a more structured and detailed manner information on specific impacts for various scenarios for 2030-2035 among a selected group of experts and stakeholders.

Please read and accept our privacy statement below before starting the survey.

There are 97 questions in this survey.

Identification

Introduction

The questions in this section will be used to better understand the background of respondents to this survey.

Do you fill-out this survey as an individual or on behalf of your organisation? *

Choose one of the following answers
Please choose **only one** of the following:

- ◯ Individual
- ◯ Organisation

In which Member State are you (professionally) / is your organisation based? *

Choose one of the following answers
Please choose **only one** of the following:

- ◯ Austria
- ◯ Belgium
- ◯ Bulgaria
- ◯ Croatia
- ◯ Cyprus
- ◯ Czech Republic
- ◯ Denmark
- ◯ Estonia
- ◯ Finland
- ◯ France
- ◯ Germany
- ◯ Greece
- ◯ Hungary
- ◯ Ireland
- ◯ Italy
- ◯ Latvia
- ◯ Lithuania
- ◯ Luxembourg
- ◯ Malta
- ◯ Netherlands
- ◯ Poland
- ◯ Portugal
- ◯ Romania
- ◯ Slovakia
- ◯ Slovenia
- ◯ Spain
- ◯ Sweden
- ◯ Other [ ]

Which category characterises your organisation / the organisation you are affiliated with best? *

Choose one of the following answers
Please choose **only one** of the following:

- ◯ Academic/research organisation
- ◯ Non-governmental organisation (NGO)
- ◯ Public authority
- ◯ Business association
- ◯ Large company/business (>250 employees)
- ◯ Individual expert
- ◯ Small and medium-sized enterprise (SME) (up to 250 employees)
- ◯ Consumer organisation
- ◯ Trade union
- ◯ Other

What is your field of activity or sector? *

Check all that apply
Please choose **all** that apply:

- ☐ Plant products / fertilisers
- ☐ Plant breeding / seeds
- ☐ Feed
- ☐ Trade
- ☐ Farming
- ☐ Organic sector
- ☐ GM-free sector
- ☐ Food processing / manufacturing
- ☐ Food retail / services
- ☐ Green biotechnology / bio-based industry
- ☐ Ornamental plants
- ☐ Forestry
- ☐ Other:

Where would you position yourself in the value chain? *

Check all that apply
Please choose **all** that apply:

- ☐ Agro-suppliers
- ☐ Breeders
- ☐ Farmers
- ☐ Traders
- ☐ Processors
- ☐ Distributors
- ☐ Retailers
- ☐ Consumer assocations
- ☐ Ministry
- ☐ Authorising authority
- ☐ Other:

In the wider area of the agricultural market, to what extent do you consider yourself knowledgeable on the following impact areas? *

Please choose the appropriate response for each item:

	Not at all	To some extent	To a moderate extent	To a great extent	I don't know
Economic impacts (e.g., costs, income)	◯	◯	◯	◯	◯
Strategic impacts (e.g. competitiveness, food security)	◯	◯	◯	◯	◯
Impact of coexistence	◯	◯	◯	◯	◯
Health, consumer and social impacts	◯	◯	◯	◯	◯
Consumer/operator information impacts	◯	◯	◯	◯	◯
Environmental impacts	◯	◯	◯	◯	◯
Impacts on regulatory and/or enforcement costs	◯	◯	◯	◯	◯

If we look ahead at 2030-2035 and future markets of NGTs, at what level of the agricultural market are you able to assess future impacts? *

ⓘ Choose one of the following answers
Please choose **only one** of the following:

◯ For the overall agricultural market in the EU
◯ For the overall agricultural market in the member state that you're based in
◯ For a specific crop / plant market in the EU
◯ For none of these levels

For which crop/plant market would you be able to assess future impacts under different scenarios for 2030-2035? If you work with multiple crops, please choose the crop which is most important for your organisation.

N.B. these categories are based on the official Eurostat categories used for the Annual crop statistics Handbook (https://ec.europa.eu/eurostat/cache/metadata/Annexes/apro_cp_esms_an1.pdf). *

Only answer this question if the following conditions are met:
((MarketLevel.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59740) == "SEU"))

Choose one of the following answers
Please choose **only one** of the following:

- ◯ C0000 Cereals for the production of grain (including seed)
- ◯ C1000 Cereals (excluding rice) for the production of grain (including seed)
- ◯ C2000 Rice
- ◯ P0000 Dry pulses and protein crops for the production of grain (including seed and mixture
- ◯ R0000 Root crops
- ◯ R1000 Potatoes (including seed potatoes)
- ◯ R2000 Sugar beet (excluding seed)
- ◯ R9000 Other root crops
- ◯ I0000 Industrial crops
- ◯ I1000 Oilseeds
- ◯ I2000 Fibre crops
- ◯ I3000 Tobacco
- ◯ I4000 Hops
- ◯ I5000 Abarcelonatic, medicinal and culinary plants
- ◯ I6000 Energy crops
- ◯ I9000 Other industrial crops
- ◯ G0000 Plants harvested green from arable land
- ◯ G1000 Temporary grasses and grazings
- ◯ G2000 Leguminous plants harvested green
- ◯ G3000 Green maize
- ◯ V0000 Fresh vegetables (including melons)
- ◯ V1000 Brassicas
- ◯ V2000 Leafy and stalked vegetables (excluding brassicas)
- ◯ V3000 Vegetables cultivated for fruit (including melons)
- ◯ V4000 Root, tuber and bulb vegetables
- ◯ V5000 Fresh pulses
- ◯ V9000 Other fresh vegetables
- ◯ S0000 Strawberries
- ◯ U1000 Mushrooms
- ◯ H0000 Permanent crops for human consumption
- ◯ F0000 Fruits, berries and nuts (excluding citrus fruits, grapes and strawberries)
- ◯ F1000 Fruits from temperate climate zones
- ◯ F2000 Fruits from subtropical and tropical climate zones
- ◯ F3000 Berries (excluding strawberries)
- ◯ F4000 Nuts
- ◯ T1000 Oranges
- ◯ T2000 Small citrus fruits
- ◯ T3000 Lemons and acid limes
- ◯ T4000 Pomelos and grapefruit
- ◯ T9000 Other citrus fruits
- ◯ W1000 Grapes
- ◯ O1000 Olives
- ◯ H9000 Other permanent crops for human consumption
- ◯ None of these markets

If you selected a primary crop in the previous question, please indicate any other major crops in your portfolio below (if any)? You can select multiple options.

N.B. these categories are based on the official Eurostat categories used for the Annual crop statistics Handbook (https://ec.europa.eu/eurostat/cache/metadata/Annexes/apro_cp_esms_an1.pdf).

Only answer this question if the following conditions are met:
(! is_empty(CropCategory.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59741)))

Check all that apply
Please choose **all** that apply:

- [ ] C0000 Cereals for the production of grain (including seed)
- [ ] C1000 Cereals (excluding rice) for the production of grain (including seed)
- [ ] C2000 Rice
- [ ] P0000 Dry pulses and protein crops for the production of grain (including seed and mixture)
- [ ] R0000 Root crops
- [ ] R1000 Potatoes (including seed potatoes)
- [ ] R2000 Sugar beet (excluding seed)
- [ ] R9000 Other root crops
- [ ] I0000 Industrial crops
- [ ] I1000 Oilseeds
- [ ] I2000 Fibre crops
- [ ] I3000 Tobacco
- [ ] I4000 Hops
- [ ] I5000 Abarcelonatic, medicinal and culinary plants
- [ ] I6000 Energy crops
- [ ] I9000 Other industrial crops
- [ ] G0000 Plants harvested green from arable land
- [ ] G1000 Temporary grasses and grazings
- [ ] G2000 Leguminous plants harvested green
- [ ] G3000 Green maize
- [ ] V0000 Fresh vegetables (including melons)
- [ ] V1000 Brassicas
- [ ] V2000 Leafy and stalked vegetables (excluding brassicas)
- [ ] V3000 Vegetables cultivated for fruit (including melons)
- [ ] V4000 Root, tuber and bulb vegetables
- [ ] V5000 Fresh pulses
- [ ] V9000 Other fresh vegetables
- [ ] S0000 Strawberries
- [ ] U1000 Mushrooms
- [ ] H0000 Permanent crops for human consumption
- [ ] F0000 Fruits, berries and nuts (excluding citrus fruits, grapes and strawberries)
- [ ] F1000 Fruits from temperate climate zones
- [ ] F2000 Fruits from subtropical and tropical climate zones
- [ ] F3000 Berries (excluding strawberries)
- [ ] F4000 Nuts
- [ ] T1000 Oranges
- [ ] T2000 Small citrus fruits
- [ ] T3000 Lemons and acid limes
- [ ] T4000 Pomelos and grapefruit
- [ ] T9000 Other citrus fruits
- [ ] W1000 Grapes
- [ ] O1000 Olives
- [ ] H9000 Other permanent crops for human consumption

What is your experience with GM crop authorisation in the European Union until today?

Check all that apply
Please choose **all** that apply:

- [ ] Submission for field trials
- [ ] Submission for cultivation
- [ ] Submission for use of food and feed and the importation into the territory of the EU
- [ ] No experience with GM crop authorisation in the EU

General assessments

Introduction

Before we move to specific scenarios for the future, we ask you some questions that are not specific for any scenario.

In the current situation, what are the most important factors for plant breeders in deciding to develop new plant varieties using CG/TM techniques for the EU market? Please distribute 100 points over the following seven categories:

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ The sum must equal 100.
❗ Each answer must be between 0 and 100
❗ Only integer values may be entered in these fields.
Please write your answer(s) here:

R&D costs (excluding regulatory compliance costs)

Regulatory costs related to market introduction

Total time to EU market in current regulatory framework

Availability of identification & detection methods

Consumer/retail demand for products derived from plant varieties using CG/TM products

Labelling & traceability requirements

EU regulatory uncertainty

Other (please specify in the next question)

Please specify here what other factors play a role in deciding whether to develop new plant varieties using CG/TM techniques for the EU market?

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

Please write your answer here:

Economic impacts

Only answer this question if the following conditions are met:
((ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Do you expect that the more widespread availability of plant varieties developed using CG/TM techniques will be *typically* positively or negatively associated with the following impacts for the EU market?

Only answer this question if the following conditions are met:
((ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong negative association	Moderate negative association	Small negative association	No association	Small positive association	Moderate positive assocation	Strong positive association	I don't know
Economic impact on breeders	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on conventional farmers	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on organic farmers	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on small farmers	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on traders	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on processors	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on the food industry	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on the feed industry	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on retail	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on non-food and non-feed business operators, including the ornamental plants, forestry, bio-based industry sectors	◯	◯	◯	◯	◯	◯	◯	◯
Economic impact on researchers	◯	◯	◯	◯	◯	◯	◯	◯

Environmental impacts

Only answer this question if the following conditions are met:
((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Do you expect that the more widespread availability of plant varieties developed using CG/TM techniques is *typically* positively or negatively associated with the following impacts for the environment?

Only answer this question if the following conditions are met:
((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong negative association	Moderate negative association	Small negative association	No association	Small positive association	Moderate positive assocation	Strong positive association	I don't know
Overall environmental effect	◯	◯	◯	◯	◯	◯	◯	◯
Total consumption of pesticides	◯	◯	◯	◯	◯	◯	◯	◯
Water quality - pesticide pollution	◯	◯	◯	◯	◯	◯	◯	◯
Total mineral fertiliser use	◯	◯	◯	◯	◯	◯	◯	◯
Water quality - nitrate pollution	◯	◯	◯	◯	◯	◯	◯	◯
Water use efficiency in agriculture	◯	◯	◯	◯	◯	◯	◯	◯
Total energy use	◯	◯	◯	◯	◯	◯	◯	◯
Greenhouse gas emission levels	◯	◯	◯	◯	◯	◯	◯	◯
Pest or pathogen pressure	◯	◯	◯	◯	◯	◯	◯	◯
Impact on ecosystem services of soil	◯	◯	◯	◯	◯	◯	◯	◯
Impact on non-target organisms	◯	◯	◯	◯	◯	◯	◯	◯
Impact on biodiversity	◯	◯	◯	◯	◯	◯	◯	◯

Health, consumer and social impacts

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

To what extent is an increased availability and adoption of plant varieties developed using TM/CG methods positively or negatively associated with the following type of health, consumer and social impacts?

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong negative association	Moderate negative association	Small negative association	No association	Small positive association	Moderate positive assocation	Strong positive association	I don't know
Health benefits (e.g. due to less intolerances or allergies to certain foods/ingredients or improved diets due to to improved nutritional profiles)	◯	◯	◯	◯	◯	◯	◯	◯
Health risk (toxicity, allergenicity, negative nutritional impact)	◯	◯	◯	◯	◯	◯	◯	◯
Occupational health and safety (e.g. health risks due to exposure to pesticides etc.)	◯	◯	◯	◯	◯	◯	◯	◯
Overall trust in European food safety	◯	◯	◯	◯	◯	◯	◯	◯
Plant breeders' rights	◯	◯	◯	◯	◯	◯	◯	◯
Farmers' Rights	◯	◯	◯	◯	◯	◯	◯	◯
Extension of breeders' and farmers' portfolios to new, neglected or locally important crop species	◯	◯	◯	◯	◯	◯	◯	◯
Availability of products free from NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Total consumer choice	◯	◯	◯	◯	◯	◯	◯	◯
EU food security	◯	◯	◯	◯	◯	◯	◯	◯
Food security in developing countries	◯	◯	◯	◯	◯	◯	◯	◯
Income and wealth inequality (due to concentration of power)	◯	◯	◯	◯	◯	◯	◯	◯

Scenarios for 2030-2035 related to risk assessment and detection method

Introduction

Risk assessment and detection are essential elements of the authorisation procedure for CG (cisgenesis) and TM (targeted mutagenesis) plant products within the existing legal framework on GMOs. For the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

Further clarification on the adapted risk assessment:
Scenarios A1 and A2 concern adapting risk assessment to the risk profile of the product. The general principles for risk assessment would be fixed in the basic legal act, while specific data requirements adapted to different levels of risk would be set in tertiary legislation and/or EFSA guidance. The basic legal act would also provide the criteria that would be used to determine the type and scale of data required to perform the risk assessment of a specific product.

A draft indicative list of such criteria is presented below as a working basis for the impact assessment analysis.

- Presence in the final product of genetic material prepared outside the organism
- Novelty (or not) of the genetic modification
- Novelty (or not) of the trait
- Technique used to introduce the modification
- Extent of the genetic modification
- Resulting (phenotypic) changes in the plant

- Expression of new protein(s)
- Alteration of expression of plant endogenous proteins outside natural variation

For the purpose of the impact assessment, it will be considered that the risk assessment would be carried out by EFSA (as today) for placing on the market of plants obtained by TM and CG and for their food and feed products. The EFSA opinion would be sent to the Commission, which would adopt the authorisation decision (as today). For field trials, the risk assessment would be carried out by national authorities (as today).

Criteria defining those CG/TM products that could also be obtained by natural/conventional breeding:
A draft indicative list of such criteria for scenario A2 is presented below as a working basis for the impact assessment analysis. The criteria would apply cumulatively (all would need to be met to conclude that a product can also be obtained naturally or by conventional breeding techniques).

- The modification (substitution, deletion, insertion) is shorter than a defined size (number of base pairs)
- The modification is present in other plants of the same species or of a crossable species
- The modification is not intended to change (increases or decreases) the expression of an existing gene beyond the natural variation
- The modification result from cellular repair of a targeted DNA break in the absence of an externally provided repair template
- The resulting genetic composition remains within that which is accessible through crossing sexually compatible species
- The trait introduced does not result in the synthesis of a substance that is not present in existing conventional food
- The food produced from the plant does not contain modified proteins significantly similar to known toxins or allergens
- The endogenous allergen content of the food has not been modified.

The procedure to verify whether or not a product can also be obtained naturally or by conventional breeding would require a mandatory pre-notification by the applicant and verification that the above criteria are fulfilled. This verification would be carried out by EFSA. Based on this verification, the regulatory status of the product would be decided by the European Commission.

Risk-related impacts

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

At the level of {if(MarketLevel=="OMS",MemberState.shown,"the EU")}, how many CG/TM-produced plant varieties do you expect to be on the market for each of the scenarios in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or ((ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4")))

❗ Only numbers may be entered in these fields.
Please write your answer(s) here:

Number of plant varieties for **scenario 0** (As today: the legal framework of today applies unchanged in 2030-2035)

Number of plant varieties for **scenario A1** (Authorisation with proportionate risk assessment and adapted detection method requirements)

Number of plant varieties for **scenario A2** (Pre-notification of products that are also obtainable naturally or by conventional breeding)

At the level of {if(MarketLevel=="OMS",MemberState.shown,"the EU")} and for each of the scenarios, what percentage of all plant varieties on the market in 2030-2035 do you expect to be developed using CG/TM techniques? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or ((ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Econ.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4")))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Number of plant varieties for **scenario 0** (As today

Number of plant varieties for **scenario A1** (Authorisation with proportionate risk assessment and adapted detection method requirements)

Number of plant varieties for **scenario A2** (Pre-notification of products that are also obtainable naturally or by conventional breeding)

To what extent do you expect that the following health, environmental, consumer and social impacts will change in scenario “0: Unchanged policy and regulation (baseline)” in 2030-2035 as compared to today?

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Presence of potential hazards (e.g. share of (off-target) mutations in new products; unintended effects of the genetic modifications; changed molecular characteristics of new products; changed phenotype/morphology/compositional and agronomic profile)	◯	◯	◯	◯	◯	◯	◯	◯
Presence of potential risks (e.g. toxicity; allergenicity; negative nutritional impacts)	◯	◯	◯	◯	◯	◯	◯	◯
Potential impact on the environment and biodiversity (e.g. through horizontal gene-transfer; accidental consumption; persistence and invasiveness) during the field trial phase of CG/TM plant varieties	◯	◯	◯	◯	◯	◯	◯	◯
Potential impact on the environment and biodiversity (e.g. through horizontal gene-transfer; accidental consumption; persistence and invasiveness) during the deliberate release of cultivation phase of CG/TM plant varieties	◯	◯	◯	◯	◯	◯	◯	◯
Risk of non-compliance of products on the market	◯	◯	◯	◯	◯	◯	◯	◯
Risk of non-compliance of field trials	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following health, environmental, consumer and social impact indicators will change in scenario “A1: Authorisation with proportionate risk assessment and adapted detection method requirements” in 2030-2035 as compared to today?

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Presence of potential hazards (e.g. share of (off-target) mutations in new products; unintended effects of the genetic modifications; changed molecular characteristics of new products; changed phenotype/morphology/compositional and agronomic profile)	◯	◯	◯	◯	◯	◯	◯	◯
Presence of potential risks (e.g. toxicity; allergenicity; negative nutritional impacts)	◯	◯	◯	◯	◯	◯	◯	◯
Potential impact on the environment and biodiversity (e.g. through horizontal gene-transfer; accidental consumption; persistence and invasiveness) during the field trial phase of CG/TM plant varieties	◯	◯	◯	◯	◯	◯	◯	◯
Potential impact on the environment and biodiversity (e.g. through horizontal gene-transfer; accidental consumption; persistence and invasiveness) during the deliberate release of cultivation phase of CG/TM plant varieties	◯	◯	◯	◯	◯	◯	◯	◯
Risk of non-compliance of products on the market	◯	◯	◯	◯	◯	◯	◯	◯
Risk of non-compliance of field trials	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following health, environmental, consumer and social impact indicators will change in scenario "A2: Pre-notification of products that are also obtainable naturally or by conventional breeding" in 2030-2035 as compared to today?

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)
Presence of potential hazards (e.g. share of (off-target) mutations in new products; unintended effects of the genetic modifications; changed molecular characteristics of new products; changed phenotype/morphology/compositional and agronomic profile)	◯	◯	◯	◯	◯	◯	◯
Presence of potential risks (e.g. toxicity; allergenicity; negative nutritional impacts)	◯	◯	◯	◯	◯	◯	◯
Potential impact on the environment and biodiversity (e.g. through horizontal gene-transfer; accidental consumption; persistence and invasiveness) during the field trial phase of CG/TM plant varieties	◯	◯	◯	◯	◯	◯	◯
Potential impact on the environment and biodiversity (e.g. through horizontal gene-transfer; accidental consumption; persistence and invasiveness) during the deliberate release of cultivation phase of CG/TM plant varieties	◯	◯	◯	◯	◯	◯	◯
Risk of non-compliance of products on the market	◯	◯	◯	◯	◯	◯	◯
Risk of non-compliance of field trials	◯	◯	◯	◯	◯	◯	◯

Strategic impacts

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

To what extent do you expect that the following strategic impacts will change in scenario "0: Unchanged policy and regulation (baseline)" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated products	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following strategic impact indicators will change in scenario "A1: Authorisation with proportionate risk assessment and adapted detection method requirements" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated product	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following strategic impact indicators will change in scenario “A2: Pre-notification of products that are also obtainable naturally or by conventional breeding” in 2030-2035 as compared to today?

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated product	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

Coexistence impacts

Coexistence impacts refers to the unintended presence of certain NGT products in other non-NGT products due to unintended presence of NGTs in non-NGT (organic/conventional) crops or unintended admixture of NGT and non-NGT crops in the value chain.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

To what extent do you expect that the following coexistence impact indicators will change in scenario "0: Unchanged policy and regulation (baseline)" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Net economic impact on organic farmers (e.g., due to lost certificates, due to admixture events, measures in place to avoid contamination, extra burden of certification)	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on farmers using NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free farmers	◯	◯	◯	◯	◯	◯	◯	◯
Area under organic farming	◯	◯	◯	◯	◯	◯	◯	◯
Area under GM-free farming	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic retailers	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free retailers	◯	◯	◯	◯	◯	◯	◯	◯
Increase in disputes	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following coexistence impact indicators will change in scenario "A1: Authorisation with proportionate risk assessment and adapted detection method requirements" in 2030-2035 as compared to today?
Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Net economic impact on organic farmers (e.g., due to lost certificates, due to admixture events, measures in place to avoid contamination, extra burden of certification)	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on farmers using NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free farmers	◯	◯	◯	◯	◯	◯	◯	◯
Area under organic farming	◯	◯	◯	◯	◯	◯	◯	◯
Area under GM-free farming	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic retailers	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free retailers	◯	◯	◯	◯	◯	◯	◯	◯
Increase in disputes	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following coexistence impact indicators will change in scenario "A2: Pre-notification of products that are also obtainable naturally or by conventional breeding" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Net economic impact on organic farmers (e.g., due to lost certificates, due to admixture events, measures in place to avoid contamination, extra burden of certification)	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on farmers using NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free farmers	◯	◯	◯	◯	◯	◯	◯	◯
Area under organic farming	◯	◯	◯	◯	◯	◯	◯	◯
Area under GM-free farming	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic retailers	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free retailers	◯	◯	◯	◯	◯	◯	◯	◯
Increase in disputes	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯

What could be alternatives methods for TM/CG plant or plant product traceability when analytical laboratory methods are unavailable or not reliable?

Please write your answer here:

Scenarios for 2030-2035 - Risk Assessment - Factors for plant breeders using CG/TM

As a reminder: for the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

Please rate to what extent these scenarios affect the attractiveness of plant breeding using CG/TM techniques in the EU for EU/international cultivation, compared to the situation today.

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

	Scenario 0: Unchanged policy and regulation (baseline)	Scenario A1: Authorisation with proportionate risk assessment and adapted detection method requirements	Scenario A2: Pre-notification of products that are also obtainable naturally or by conventional breeding
Total regulatory costs			
Market uncertainty			
Time to market			
Total attractiveness for plant breeding using CG/TM techniques for the EU market			

Scenarios for 2030-2035 - Risk Assessment - Impact of traits

As a reminder: for the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

Impact of traits from CG/TM-based plant varieties

NGTs can in principle develop plants faster than conventional breeding techniques. More new varieties can thus be on the market faster, including those with specific desired characteristics, (e.g. stress resistance or consumer health.) In the following questions, we ask you to estimate the most likely percentage increase (positive percentage) or decrease (negative percentage) possible on such indicators due to new varieties that you expect to be on the market in 2030-2035 when the presented scenario is adopted. We ask for the net impact, meaning that we ask you to assess to what extent the CG/TM-developed varieties by 2030-2035 score higher/lower compared to what you expect to be available through conventional breeding in 2030-2035.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

In scenario 0: “Unchanged policy and regulation (baseline)”, what net effects do you expect to be attained on the following indicators by new plant varieties developed with CG/TM techniques on the market in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Each answer must be between -100 and 100
❗ Only integer values may be entered in these fields.
Please write your answer(s) here:

Expected change in pesticide use

Expected change in fertiliser use

Expected change in energy use

Expected change in use of natural resources (soil, water, etc.)

Expected change in total typical yield (either through productivity, or through risk-reduction traits such as drought tolerance)

Expected change in yield value (monetary)

Expected change in yield stability (higher means, lower variance)

Expected change in availability of plants with improved nutritional profiles

Expected change in breeders'/farmers' portfolio with new plant varieties, e.g., vegetables, fruits, neglected or locally important crops

Plant varieties with tolerance/resistance to environmental conditions (abiotic stresses), including climate change effects

Plant varieties tolerance/resistance to plant diseases (biotic stresses), e.g. due to nematodes, fungi, bacteria, viruses or pests

In scenario A1: “Authorisation with proportionate risk assessment and adapted detection method requirements”, what net effects do you expect to be attained on the following indicators by new plant varieties developed with CG/TM techniques on the market in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between -100 and 100
Please write your answer(s) here:

Expected change in pesticide use

Expected change in fertiliser use

Expected change in energy use

Expected change in use of natural resources (soil, water, etc.)

Expected change in total typical yield (either through productivity, or through risk-reduction traits such as drought tolerance)

Expected change in yield value (monetary)

Expected change in yield stability (higher means, lower variance)

Expected change in availability of plants with improved nutritional profiles

Expected change in breeders'/farmers' portfolio with new plant varieties, e.g., vegetables, fruits, neglected or locally important crops

Plant varieties with tolerance/resistance to environmental conditions (abiotic stresses), including climate change effects

Plant varieties tolerance/resistance to plant diseases (biotic stresses), e.g. due to nematodes, fungi, bacteria, viruses or pests

The development of NGTs has led to new plant varieties with properties such as changed herbicide tolerance, (a)biotic stress tolerance/resistance, etc. In scenario A2: "Pre-notification of products that are also obtainable naturally or by conventional breeding", what net effects do you expect to be attained on the following indicators by new plant varieties developed with CG/TM techniques on the market in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between -100 and 100
Please write your answer(s) here:

Expected change in pesticide use

Expected change in fertiliser use

Expected change in energy use

Expected change in use of natural resources (soil, water, etc.)

Expected change in total typical yield (either through productivity, or through risk-reduction traits such as drought tolerance)

Expected change in yield value (monetary)

Expected change in yield stability (higher means, lower variance)

Expected change in availability of plants with improved nutritional profiles

Expected change in breeders'/farmers' portfolio with new plant varieties, e.g., vegetables, fruits, neglected or locally important crops

Plant varieties with tolerance/resistance to environmental conditions (abiotic stresses), including climate change effects

Plant varieties tolerance/resistance to plant diseases (biotic stresses), e.g. due to nematodes, fungi, bacteria, viruses or pests

Scenarios for 2030-2035 - Risk Assessment - Adoption by farmers

As a reminder: for the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

Adoption by farmers of plants developed with CG/TM techniques

The following question concern the adoption of plants developed with CG/TM techniques by farmers in 2030-2035. We ask you to assess the market share of such plants or crops. The market share is considered at the level of the farmer against the total crop/plant market in the EU (i.e. the share of CG/TM crops over all crops used).

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y" or FieldActivitySector_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

What do you expect will be the total market share of CG/TM crops/plants used by farmers for each of the scenarios in 2030-2035? Please answer this question for the {if(MarketLevel=="SEU","{CropCategory.shown} market","the overall argicultural market")} in {if(MarketLevel=="OMS",MemberState.shown,"the EU")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Expected total market share (in percent) on the crop market in the EU for **Scenario 0** (As today

Expected total market share (in percent) on the crop market in the EU for **Scenario A1** (Authorisation with proportionate risk assessment and adapted detection method requirements)

Expected total market share (in percent) on the crop market in the EU for **Scenario A2** (Pre-notification of products that are also obtainable naturally or by conventional breeding)

In scenario 0: "Unchanged policy and regulation (baseline)", what do you expect will be the market share of CG/TM {if(MarketLevel=="SEU",CropCategory.shown,"crops/plants")} with specific traits used by farmers in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035?

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Plants with traits affecting pesticide use

Plants with traits affecting fertiliser use

Plants with traits affecting energy use

Plants with traits affecting natural resources use

Plants with traits modifying content that could affect health

Plants with traits that modify nutritional profile

Plants with traits affecting total yield

Plants with traits affecting total yield stability

Plants with traits affecting yield value

Plants with traits affecting tolerance/resistance to biotic stresses (e.g. nematodes, fungi, bacteria, viruses or pests)

Plants with traits affecting tolerance/resistance to abiotic stresses (e.g. drought tolerance)

In scenario A1: “Authorisation with proportionate risk assessment and adapted detection method requirements”, what do you expect will be the market share of CG/TM {if(MarketLevel=="SEU",CropCategory.shown,"crops/plants")} with specific traits used by farmers in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035?

Only numbers may be entered in these fields.
Each answer must be between 0 and 100
Please write your answer(s) here:

Plants with traits affecting pesticide use

Plants with traits affecting fertiliser use

Plants with traits affecting energy use

Plants with traits affecting natural resources use

Plants with traits modifying content that could affect health

Plants with traits that modify nutritional profile

Plants with traits affecting total yield

Plants with traits affecting total yield stability

Plants with traits affecting yield value

Plants with traits affecting tolerance/resistance to biotic stresses (e.g. nematodes, fungi, bacteria, viruses or pests)

Plants with traits affecting tolerance/resistance to abiotic stresses (e.g. drought tolerance)

In scenario A2: “Pre-notification of products that are also obtainable naturally or by conventional breeding”, what do you expect will be the market share of CG/TM {if(MarketLevel=="SEU",CropCategory.shown,"crops/plants")} with specific traits used by farmers in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035?

Only numbers may be entered in these fields.
Each answer must be between 0 and 100
Please write your answer(s) here:

Plants with traits affecting pesticide use

Plants with traits affecting fertiliser use

Plants with traits affecting energy use

Plants with traits affecting natural resources use

Plants with traits modifying content that could affect health

Plants with traits that modify nutritional profile

Plants with traits affecting total yield

Plants with traits affecting total yield stability

Plants with traits affecting yield value

Plants with traits affecting tolerance/resistance to biotic stresses (e.g. nematodes, fungi, bacteria, viruses or pests)

Plants with traits affecting tolerance/resistance to abiotic stresses (e.g. drought tolerance)

Scenarios for 2030-2035 related to labelling and traceability requirements

Introduction

Labelling and traceability are essential elements within the current policy and regulatory framework for plant varieties developed using CG/TM (cisgenesis or targeted mutagenesis, referred to as NGTs - i.e. new genomic techniques). For the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Labelling (GMO-specific requirements)	Traceability (GMO-specific requirements)
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

Consumer information impacts

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4") or (ImpactKnow_Cons.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Cons.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Compared to the baseline (always a GM labelling requirement), how does the provision of information for consumers on the CG/TM status of products change in the case of the removal of a GM labelling requirement on the final product and replacing it with another method of obtaining information (e.g. link to a website or QR code)?

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4") or (ImpactKnow_Cons.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Cons.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Time required for consumers to access information on the CG/TM-status of products	◯	◯	◯	◯	◯	◯	◯	◯
Willingness of consumers to pursue information not available on the label (e.g. via link to website or QR code)	◯	◯	◯	◯	◯	◯	◯	◯
Trust of consumers that products labelled as organic/non-GM are free from products of CG/TM	◯	◯	◯	◯	◯	◯	◯	◯
Clarity for consumers when CG/TM products will have a sustainable trait label if they have sustainable traits	◯	◯	◯	◯	◯	◯	◯	◯
Willingness to buy CG/TM products if sustainable trait label indicates the product has sustainable traits	◯	◯	◯	◯	◯	◯	◯	◯

Compared to the baseline (always a GM labelling requirement), how do the how do the following indicators for CG/TM products change in the case of an additional sustainability label (scenario B1)?

Only answer this question if the following conditions are met:
((ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_HealConSoc.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4") or (ImpactKnow_Cons.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Cons.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Clarity for consumers when CG/TM products will have a sustainable trait label if they have sustainable traits	◯	◯	◯	◯	◯	◯	◯	◯
Willingness to buy CG/TM products if sustainable trait label indicates the product has sustainable traits	◯	◯	◯	◯	◯	◯	◯	◯

To what extent would the following indicators change <u>in case of additional traceability requirements for sustainability claims?</u>

Only answer this question if the following conditions are met:
(ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4")

Please choose the appropriate response for each item:

	Strong decrease	Moderate decrease	Small decrease	No change	Small increase	Moderate increase	Strong increase	I don't know
Ease of compliance	◯	◯	◯	◯	◯	◯	◯	◯
Administrative burden	◯	◯	◯	◯	◯	◯	◯	◯
Costs of compliance	◯	◯	◯	◯	◯	◯	◯	◯

Strategic impacts

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Compared to the baseline (always a GM labelling requirement), how do the following strategic indicators for CG/TM products change in the case of an additional sustainability label (scenario B1)? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated products	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

Compared to the baseline (always a GM labelling requirement), how do the following strategic indicators for CG/TM products change in the case of "No labelling if sustainable" (scenario B2)? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated products	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

Compared to the baseline (always a GM labelling requirement), how do the following strategic indicators for CG/TM products change in the case of "No labelling and traceability if a product is also obtainable naturally or by conventional breeding" (scenario B3)? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated products	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

Coexistence impacts

Coexistence impacts refer to the unintended presence of certain NGT products in other non-NGT products due to unintended presence of NGTs in non-NGT (organic/conventional) crops or unintended admixture of NGT and non-NGT crops in the value chain.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

To what extent do you expect that the following coexistence impact indicators to change in scenario B1: "Additional sustainability label" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Net economic impact on organic farmers (e.g., due to lost certificates, due to admixture events, measures in place to avoid contamination, extra burden of certification)	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on farmers using NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free farmers	◯	◯	◯	◯	◯	◯	◯	◯
Area under organic farming	◯	◯	◯	◯	◯	◯	◯	◯
Area under GM-free farming	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic retailers	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free retailers	◯	◯	◯	◯	◯	◯	◯	◯
Increase in disputes	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Willingness of consumers to buy products that bear a sustainability claim related to a CG/TM trait on the label	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following coexistence impact indicators to change in scenario B2: “No labelling if sustainable” in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Net economic impact on organic farmers (e.g., due to lost certificates, due to admixture events, measures in place to avoid contamination, extra burden of certification)	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on farmers using NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free farmers	◯	◯	◯	◯	◯	◯	◯	◯
Area under organic farming	◯	◯	◯	◯	◯	◯	◯	◯
Area under GM-free farming	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic retailers	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free retailers	◯	◯	◯	◯	◯	◯	◯	◯
Increase in disputes	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following coexistence impact indicators will change in scenario B3: "No labelling and traceability if a product is also obtainable naturally or by conventional breeding" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Net economic impact on organic farmers (e.g., due to lost certificates, due to admixture events, measures in place to avoid contamination, extra burden of certification)	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on farmers using NGTs	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free farmers	◯	◯	◯	◯	◯	◯	◯	◯
Area under organic farming	◯	◯	◯	◯	◯	◯	◯	◯
Area under GM-free farming	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on costs of GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free traders	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free processors	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free food industry	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on organic retailers	◯	◯	◯	◯	◯	◯	◯	◯
Net economic impact on GM-free retailers	◯	◯	◯	◯	◯	◯	◯	◯
Increase in disputes	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in organic labels	◯	◯	◯	◯	◯	◯	◯	◯
Impact on consumer trust in GM-free labels	◯	◯	◯	◯	◯	◯	◯	◯

What could be alternatives to traceability requirements for sustainability claims?

Only answer this question if the following conditions are met:
((ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Coex.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please write your answer here:

Scenarios for 2030-2035 related to sustainability provisions

Introduction

NGTs can potentially contribute to sustainability goals within the Green Deal. Unlike today, provisions related to sustainability could be introduced in the future policy and regulatory framework for cisgenesis (CG) or targeted mutagenesis (TM). For the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation

C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

Scope of the scenarios
The considerations for sustainability in these scenarios refer only to the trait in the introduced plant, and its potential impacts on sustainability (e.g., a trait that reduces the amount needed of a pesticide or a trait resulting in increased need of water), when compared to the plant without genetic modification.

Dimensions of sustainability
The scenarios cover the potential impacts on the three dimensions of sustainability, i.e. environmental, social (including health) and economic aspects.

Verification of the impact on sustainability
The impact of the modified trait on sustainability would be verified by a competent authority, based on information supplied by the applicant. This verification process could follow either a decentralised (verification by a national competent authority) or a centralised (by EFSA) procedure.

Two draft indicative lists are presented below as a working basis for the impact assessment analysis. These lists reflect the sustainability-related objectives of the Green Deal and the Farm to Fork and Biodiversity strategies, including those relating to food security, and cover all three dimensions of sustainability mentioned above.

List of desirable sustainability impacts:

- Reduction in use of plant protection products
- Reduction in use of fertilisers
- Reduction in use of natural resources
- Tolerance/resistance to environmental conditions (abiotic stresses), including climate change effects
- Tolerance/resistance to plant diseases (biotic stresses), e.g. due to nematodes, fungi, bacteria, viruses or pests
- Better composition or healthier nutrient profile, e.g. on fats, proteins, vitamins, fibres, sugar content, lower content of toxic substances or allergens
- Better agronomical characteristics, e.g., increased or more stable yields, more or larger seeds or fruits, improved flowering time, improved breeding characteristics
- Reduced food waste through better harvest, post-harvest, transport or storage performance
- (Re-)Introduction of niche/orphan plants that are important from a local ecological or agri-food perspective

List of undesirable sustainability impacts sustainability:

- Increase in use of plant protection products
- Increase in use of fertilisers
- Increase in use of natural resources
- Reduced tolerance/resistance to environmental conditions (abiotic stresses), including climate change effects
- Reduced tolerance/resistance to plant diseases (biotic stresses), e.g. due to nematodes, fungi, bacteria, viruses or pests
- Worse composition or less healthy nutrient profile, e.g. on fats, proteins, vitamins, fibres, sugar content, higher content of toxic substances or allergens
- Increased food waste through worse harvest, post-harvest, transport, or storage performance
- Disappearance of niche/orphan plants that are important from a local ecological or agri-food perspective

Environmental impacts

Only answer this question if the following conditions are met:
((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

To what extent do you expect a positive or negative association between the availability and adoption of plant varieties developed with TM/CG techniques on the market in 2030-2035 and the following environmental impacts in absence of sustainability incentives/requirements (i.e. Scenario 0: baseline)?

Only answer this question if the following conditions are met:
((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong negative association	Moderate negative association	Small negative association	No association Small positive association	Moderate positive association	Strong positive association	I don't know
Overall environmental effect	◯	◯	◯	◯	◯	◯	◯
Total consumption of pesticides	◯	◯	◯	◯	◯	◯	◯
Water quality - pesticide pollution	◯	◯	◯	◯	◯	◯	◯
Total mineral fertiliser use	◯	◯	◯	◯	◯	◯	◯
Water quality - nitrate pollution	◯	◯	◯	◯	◯	◯	◯
Water use efficiency in agriculture	◯	◯	◯	◯	◯	◯	◯
Total Energy use	◯	◯	◯	◯	◯	◯	◯
Greenhouse gas emission levels	◯	◯	◯	◯	◯	◯	◯
Pest or pathogen pressure	◯	◯	◯	◯	◯	◯	◯
Impact on ecosystem services of soil	◯	◯	◯	◯	◯	◯	◯
Impact on non-target organisms	◯	◯	◯	◯	◯	◯	◯
Impact on biodiversity	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect a positive or negative association between the availability and adoption of plant varieties developed with TM/CG techniques on the market in 2030-2035 and the following environmental impacts in the case of sustainability incentives for authorisation (i.e. Scenario C1)?

Only answer this question if the following conditions are met:
((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong negative association	Moderate negative association	Small negative association	No association	Small positive association	Moderate positive assocation	Strong positive association	I don't know
Overall environmental effect	◯	◯	◯	◯	◯	◯	◯	◯
Total use of pesticides	◯	◯	◯	◯	◯	◯	◯	◯
Water quality - pesticide pollution	◯	◯	◯	◯	◯	◯	◯	◯
Total mineral fertiliser use	◯	◯	◯	◯	◯	◯	◯	◯
Water quality - nitrate pollution	◯	◯	◯	◯	◯	◯	◯	◯
Water use efficiency in agriculture	◯	◯	◯	◯	◯	◯	◯	◯
Total Energy use	◯	◯	◯	◯	◯	◯	◯	◯
Greenhouse gas emission levels	◯	◯	◯	◯	◯	◯	◯	◯
Pest or pathogen pressure	◯	◯	◯	◯	◯	◯	◯	◯
Impact on ecosystem services of soil	◯	◯	◯	◯	◯	◯	◯	◯
Impact on non-target organisms	◯	◯	◯	◯	◯	◯	◯	◯
Impact on biodiversity	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect a positive or negative association between the availability and adoption of plant varieties developed with TM/CG techniques on the market in 2030-2035 and the following environmental impacts in the case of sustainability requirements for authorisation such as in Scenario C2: "Sustainability requirement: no authorisation if detrimental to sustainability"?

Only answer this question if the following conditions are met:
((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong negative association	Moderate negative association	Small negative association	No association	Small positive association	Moderate positive assocation	Strong positive association	I don't know
Overall environmental effect	◯	◯	◯	◯	◯	◯	◯	◯
Total use of pesticides	◯	◯	◯	◯	◯	◯	◯	◯
Water quality - pesticide pollution	◯	◯	◯	◯	◯	◯	◯	◯
Total mineral fertiliser use	◯	◯	◯	◯	◯	◯	◯	◯
Water quality - nitrate pollution	◯	◯	◯	◯	◯	◯	◯	◯
Water use efficiency in agriculture	◯	◯	◯	◯	◯	◯	◯	◯
Total Energy use	◯	◯	◯	◯	◯	◯	◯	◯
Total use of natural resources	◯	◯	◯	◯	◯	◯	◯	◯
Greenhouse gas emission levels	◯	◯	◯	◯	◯	◯	◯	◯
Pest or pathogen pressure	◯	◯	◯	◯	◯	◯	◯	◯
Impact on ecosystem services of soil	◯	◯	◯	◯	◯	◯	◯	◯
Impact on non-target organisms	◯	◯	◯	◯	◯	◯	◯	◯
Impact on biodiversity	◯	◯	◯	◯	◯	◯	◯	◯

Impact of traits from CG/TM-based plant varieties

NGTs can in principle develop plants faster than conventional breeding techniques. More new varieties can thus be on the market faster, including those with specific desired characteristics, (e.g. stress resistance or consumer health.) In the following questions, we ask you to estimate the most likely percentage increase (positive percentage) or decrease (negative percentage) possible on such indicators due to new varieties that you expect to be on the market in 2030-2035 assuming the presented scenarios will be part of regulations that would enter into force in 2025. We ask for the net impact, meaning that we ask you to assess to what extent the CG/TM-developed varieties by 2030-2035 score higher/lower compared to what you expect to be available through conventional breeding in 2030-2035.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

In scenario C1: “Sustainability incentives for authorisation”, compared to the baseline what net effects do you expect to be attained on the following indicators by new plant varieties developed with CG/TM techniques on the market in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between -100 and 100
Please write your answer(s) here:

Expected change in pesticide use

Expected change in fertiliser use

Expected change in energy use

Expected change in use of natural resources (soil, water, etc.)

Expected change in total typical yield (either through productivity, or through risk-reduction traits such as drought tolerance)

Expected change in yield value (monetary)

Expected change in yield stability (higher means lower variance)

Expected change in breeders/farmers portfolio size with new plant varieties, e.g., vegetables, fruits, neglected or locally important crops

In scenario C2: “Sustainability requirement: no authorisation if detrimental to sustainability", compared to the baseline, what net effects do you expect to be attained on the following indicators by new plant varieties developed with CG/TM techniques on the market in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between -100 and 100
Please write your answer(s) here:

Expected change in pesticide use

Expected change in fertiliser use

Expected change in energy use

Expected change in use of natural resources (soil, water, etc.)

Expected change in total typical yield (either through productivity, or through risk-reduction traits such as drought tolerance)

Expected change in yield value (monetary)

Expected change in yield stability (higher means lower variance)

Expected change in breeders/farmers portfolio size with new plant varieties, e.g., vegetables, fruits, neglected or locally important crops

Adoption by farmers of plants developed with CG/TM techniques

The following question concern the adoption of plants developed with CG/TM techniques by farmers in the EU in 2030-2035. We ask you to assess the market share of such plants or crops. The market share is considered at the level of the farmer against the total crop/plant market in the EU (i.e. the share of CG/TM crops over all crops used).

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (FieldActivitySector_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

What do you expect will be the total market share of CG/TM crops/plants used by farmers for each of the scenarios in 2030-2035? Please answer this question for the {if(MarketLevel=="SEU","{CropCategory.shown} market","the overall argicultural market")} in {if(MarketLevel=="OMS",MemberState.shown,"the EU")}.

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (FieldActivitySector_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Expected total market share in **scenario C1**

Expected total market share in **scenario C2**

In scenario C1: “Sustainability incentives for authorisation”, what do you expect will be the market share of CG/TM {if(MarketLevel=="SEU",CropCategory.shown,"crops/plants")} with specific traits used by farmers in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035?

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (FieldActivitySector_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Plants with traits affecting pesticide use

Plants with traits affecting fertiliser use

Plants with traits affecting energy use

Plants with traits affecting natural resources use

Plants with traits modifying content that could affect health

Plants with traits that modify nutritional profile

Plants with traits affecting total yield

Plants with traits affecting yield stability

Plants with traits affecting yield value

Plants with traits affecting tolerance/resistance to biotic stresses (e.g. nematodes, fungi, bacteria, viruses or pests)

Plants with traits affecting tolerance/resistance to abiotic stresses (e.g. drought tolerance)

In scenario C2: “Sustainability requirement: no authorisation if detrimental to sustainability", what do you expect will be the market share of CG/TM {if(MarketLevel=="SEU",CropCategory.shown,"crops/plants")} with specific traits used by farmers in {if(MarketLevel=="OMS",MemberState.shown,"the EU")} in 2030-2035?

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (FieldActivitySector_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Expected market share of CG/TM plants with traits affecting pesticide use

Expected market share of CG/TM plants with traits affecting fertiliser use

Expected market share of CG/TM plants with traits affecting energy use

Expected market share of CG/TM plants with traits affecting natural resources use

Expected market share of CG/TM plants with traits modifying content that could improve health

Expected market share of CG/TM plants with traits affecting total yield

Expected market share of CG/TM plants with traits affecting yield value

Factors for plant breeders developing varieties using CG/TM

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

At the level of {if(MarketLevel=="OMS",MemberState.shown,"the EU")}, what number of plant varieties developed using CG/TM techniques do you expect to be on the market for each of the scenarios in 2030-2035? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
(((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y")) or ((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3") or (ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4")) or (TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1"))

❗ Only numbers may be entered in these fields.
Please write your answer(s) here:

Number of plant varietes developed in **scenario C1**: Sustainability incentives for automisation

Number of plant varietes developed in **scenario C2**: Sustainability requirement: no authorisation if detrimental to sustainability

At the level of {if(MarketLevel=="OMS",MemberState.shown,"the EU")} and for each of the scenarios, what percentage of all plant varieties on the market in 2030-2035 do you expect to be developed using CG/TM techniques? Please consider the {if(MarketLevel=="SEU","{CropCategory.shown} market only","the overall argicultural market")}.

Only answer this question if the following conditions are met:
(((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y")) or ((ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Env.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4")) or (TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A1"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Number of plant varietes developed in **scenario C1**

Number of plant varietes developed in **scenario C2**

In Scenario C1: “Sustainability incentives for authorisation” examples of positive regulatory incentives are provided for the authorisation of NGT plant products with traits that contribute to sustainability. Would these examples of regulatory incentives be useful in your opinion?

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

Please write your answer here:

In Scenario C1: “Sustainability incentives for authorisation” examples of positive regulatory incentives are provided for the authorisation of NGT plant products with traits that contribute to sustainability. What additional regulatory incentives do you think would be interesting or effective for plant breeders?

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

Please write your answer here:

Strategic impacts

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

To what extent do you expect that the following strategic impact indicators will change in scenario "C1: Sustainability incentives for authorisation" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated products	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

To what extent do you expect that the following strategic impact indicators will change in scenario "C2: Sustainability requirement: no authorisation if detrimental to sustainability" in 2030-2035 as compared to today? Impact indicators in italic are purely qualitative.

Only answer this question if the following conditions are met:
((ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A3" or ImpactKnow_Strat.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59739) == "A4"))

Please choose the appropriate response for each item:

	Strong decrease (<-25%)	Moderate decrease (-10 to -25%)	Small decrease (-1 to -10%)	No change (0%)	Small increase (1 to 10%)	Moderate increase (10 to 25%)	Strong increase (>25%)	I don't know
Number of authorised products or cultivated products	◯	◯	◯	◯	◯	◯	◯	◯
SME market share in breeding / seed industry	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of plant breeding (vis-à-vis countries that have addressed NGTs specifically in their legislation	◯	◯	◯	◯	◯	◯	◯	◯
Cost/price competitiveness of farming (vis-à-vis countries that have addressed NGTs specifically in their legislation)	◯	◯	◯	◯	◯	◯	◯	◯
Availability of funding for biotechnology R&D in academia/research institutes	◯	◯	◯	◯	◯	◯	◯	◯
Total private R&D expenditure on plant breeding in EU	◯	◯	◯	◯	◯	◯	◯	◯
EU share of NGT-related patents globally	◯	◯	◯	◯	◯	◯	◯	◯
Food security in EU	◯	◯	◯	◯	◯	◯	◯	◯
Market concentration	◯	◯	◯	◯	◯	◯	◯	◯
Concentration of intellectual property rights	◯	◯	◯	◯	◯	◯	◯	◯
Access to (bio)technologies and genetic material in EU	◯	◯	◯	◯	◯	◯	◯	◯
Internal EU trade	◯	◯	◯	◯	◯	◯	◯	◯
International trade	◯	◯	◯	◯	◯	◯	◯	◯

Scenarios for 2030-2035 - Sustainability - Factors Plant Breeders

As a reminder: for the questions in this section, we ask you to assume the following scenarios for 2030-2035 and assume no national opt-out will be in place:

Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval procedures including waiving of fees for the detection method, no renewal/time limit for authorisations).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	**Not needed:** NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

Please rate to what extent these scenarios affect the attractiveness of plant breeding using CG/TM techniques in the EU for cultivation, compared to the situation today.

Only answer this question if the following conditions are met:
((FieldActivitySector_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59737) == "Y") or (PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

	Scenario C1: Sustainability incentives for authorisation	Scenario C2: Sustainability requirements for authorisation
Total regulatory costs		
Market uncertainty		
Time to market		
Total attractiveness for plant breeding using CG/TM techniques for the EU market		

Questions on costs

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	Labelling (GMO-specific requirements)	Traceability (GMO-specific requirements)
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

What is the estimated cost for a GM authorisation for cultivation under scenario "Unchanged policy and regulation (baseline)", in 2030-2035?
Please note that the main legal rules in this scenario are:

- Regulation 1829/2003
- Regulation 503/2013

Please note that the costs to account for in estimates are:

- Reporting for hazard identification
- Exposure assessment
- Post market monitoring
- Environmental assessment
- Environmental monitoring plan
- Information relating to the safety of genetically modified food and feed,
- Traceability and labelling

Activities triggering authorisation costs are:

- Notification of (specific) activities or events
- Submission of (recurring) reports, including on post-market monitoring.
- Information labelling for third parties
- Non-labelling information for third parties
- Application for individual authorisation or exemption
- Application for general authorisation or exemption
- Registration
- Certification of products or processes
- Inspection on behalf of public authorities
- Cooperation with audits and inspection by public authorities, including maintenance of appropriate records
- Any obligation on citizens

The answers are in million EUR.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

❗ Each answer must be between 0 and 2
❗ Only integer values may be entered in these fields.
Please write your answer(s) here:

Costs related to submission for cultivation

Would you have any auxiliary clarifications on the cost estimates related to submission for cultivation? Please indicate below.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

Please write your answer here:

What is the estimated cost (in million EUR) for a GM authorisation submission for field trialling under scenario 0 "Unchanged policy and regulation (baseline)", in 2030-2035?
Please note that the main legal rules in this scenario are:

- Directive 2001/18/EC (article 6)

Please note that the costs to account for in estimates are:

- General Information
- Information relating to the recipient or parental plants
- Information relating to the genetic modification
- Information relating to the genetically modified plant
- Information relating to the site of release
- Information relating to the release
- Information on control, monitoring, post release and waste treatment plans
- Monitoring plan
- Summary

Activities triggering authorisation costs are:

- Notification of (specific) activities or events
- Submission of (recurring) reports, including on post-market monitoring.
- Information labelling for third parties
- Non-labelling information for third parties
- Application for individual authorisation or exemption
- Application for general authorisation or exemption
- Registration
- Certification of products or processes
- Inspection on behalf of public authorities
- Cooperation with audits and inspection by public authorities, including maintenance of appropriate records
- Any obligation on citizens

The answers are in million EUR.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

Each answer must be between 0 and 2
Only integer values may be entered in these fields.
Please write your answer(s) here:

Costs related to submission for field trialling

Would you have any auxiliary clarifications on the cost estimates related to submission for field trialling? Please indicate below.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

Please write your answer here:

What is the estimated cost (in million EUR) for a GM authorisation submission for use of food or feed and the importation into the territory of the EU under scenario 0 "Unchanged policy and regulation (baseline)", in 2030-2035?
Please note that the main legal rules in this scenario are:

- Regulation 1829/2003
- Regulation 503/2013

Please note that the costs to account for in estimates are:

- Hazard identification and characterisation
- Exposure assessment
- Post market monitoring
- Environmental assessment
- Environmental monitoring plan
- Information relating to the safety of genetically modified food and feed
- Traceability and labelling

Activities triggering authorisation costs are:

- Notification of (specific) activities or events
- Submission of (recurring) reports, including on post-market monitoring.
- Information labelling for third parties
- Non-labelling information for third parties
- Application for individual authorisation or exemption
- Application for general authorisation or exemption
- Registration
- Certification of products or processes
- Inspection on behalf of public authorities
- Cooperation with audits and inspection by public authorities, including maintenance of appropriate records
- Any obligation on citizens

The answers are in million EUR.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

❗ Each answer must be between 0 and 100
❗ Only integer values may be entered in these fields.
Please write your answer(s) here:

Costs related to submission for use for food and feed

Would you have any auxiliary clarifications on the cost estimates related to submission for use for food and feed? Please indicate below.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

Please write your answer here:

How are authorisation costs split over the following type of costs? Please provide a percentage if possible.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Administrative costs

Adjustment costs

Other, please indicate in next question

Please comment on the split of the authorisation costs that you provided in the previous question and specifiy Other when selected.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

What is the average duration (in years) for a GM crop authorisation (from application to authorisation)?

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Authorisation for cultivation

Authorisation for use of food and feed and the importation into the territory of the European Union

Authorisation for field trialling

What share (in percentages) of your annual turnover do GM authorisation costs represent?

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between 0 and 100
Please write your answer(s) here:

Authorisation for cultivation

Authorisation for use of food and feed and the importation into the territory of the European Union

Authorisation for field trialling

How significant is the cost of delay for your business as a result of the length of the authorisation procedure?

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

❗ Choose one of the following answers
Please choose **only one** of the following:

- ◯ No costs
- ◯ Low costs
- ◯ Moderate costs
- ◯ High costs
- ◯ Significant costs

Make a comment on your choice here:

What are entry barriers for GM plant breeding for SMEs and what kind of measures could lower them?

Only answer this question if the following conditions are met:
((TypeOrg.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59736) == "A7"))

	Barriers for plant breeding SMEs	Measures to lower barriers
For cultivation		
For use of food and feed and the importation into the territory of the European Union		
For field trialling		

With how much percent do you expect authorisation costs will change in scenarios A, B and C in 2030-2035 as compared to today? Please neglect any exterior effects such as inflation. You can skip this question if you are not able/comfortable to assess this change.

Note that administrative costs of authorisation are costs associated with any of the following activities:

- notification of (specific) activities or events
- submission of (recurring) reports, including on post-market monitoring.
- information labelling for third parties
- non-labelling information for third parties
- application for individual authorisation or exemption
- application for general authorisation or exemption
- registration
- certification of products or processes
- inspection on behalf of public authorities
- cooperation with audits and inspection by public authorities, including maintenance of appropriate records
- any obligation on citizens

Only answer this question if the following conditions are met:
((PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ010.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

❗ Only numbers may be entered in these fields.
❗ Each answer must be between -100 and 100
Please write your answer(s) here:

A1

A2

B1

B2

B3

C1

C2

Please describe any other expected direct or indirect costs for individual scenarios in 2030-2035.

Only answer this question if the following conditions are met:
((AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y") or (AuthorisationExp_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

	Describe
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	
B1: Additional sustainability label	
B2: No labelling if sustainable	
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	
C1: Sustainability incentives for authorisation	
C2: Sustainability requirement: no authorisation if detrimental to sustainability	

Questions on costs - Costs along the value chain

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	Labelling (GMO-specific requirements)	Traceability (GMO-specific requirements)
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

To what extent do you expect that the following costs will change in scenarios A, B and C? Please neglect any exterior effects such as inflation. You can skip this question if you are not able/comfortable to assess this change.

Only answer this question if the following conditions are met:
((PositionValueChain_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ004.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ006.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ007.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ008.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

	Traceability costs	Labelling costs	Costs to avoid contamination (identity preservation)	Post market monitoring
A1: Authorisation with proportionate risk assessment and adapted detection method requirements				
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding				
B1: Additional sustainability label				
B2: No labelling if sustainable				
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding				
C1: Sustainability incentives for authorisation				
C2: Sustainability requirement: no authorisation if detrimental to sustainability				

Questions on costs - Costs along the value chain - Other costs

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	Labelling (GMO-specific requirements)	Traceability (GMO-specific requirements)
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation

C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

Please describe any other expected direct or indirect costs along the value chain for individual scenarios in 2030-2035.

Only answer this question if the following conditions are met:
((PositionValueChain_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ003.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ004.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ005.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ006.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ007.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y" or PositionValueChain_SQ008.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

	Describe
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	
B1: Additional sustainability label	
B2: No labelling if sustainable	
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	
C1: Sustainability incentives for authorisation	
C2: Sustainability requirement: no authorisation if detrimental to sustainability	

Questions on costs for authorities - Costs related to imports

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	**Risk assessment**	**Detection**
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	**Labelling (GMO-specific requirements)**	**Traceability (GMO-specific requirements)**
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	**Authorisation**

0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

To what extent do you expect that the costs related to import will change in scenarios 0, A, B and C in 2030-2035?

Only answer this question if the following conditions are met: ((PositionValueChain_SQ009.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ010.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

	Assessment for authorisation	Enforcement
0: Unchanged policy and regulation: the legal framework of today applies unchanged in 2030-2035		
A1: Authorisation with proportionate risk assessment and adapted detection method requirements		
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding		
B1: Additional sustainability label		
B2: No labelling if sustainable		
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding		
C1: Sustainability incentives for authorisation		
C2: Sustainability requirement: no authorisation if detrimental to sustainability		

Questions on costs for authorities - Costs related to cultivation

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	**Risk assessment**	**Detection**
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	**Labelling (GMO-specific requirements)**	**Traceability (GMO-specific requirements)**
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

To what extent do you expect that the costs related to cultivation will change in scenarios 0, A, B and C in 2030-2035?

Only answer this question if the following conditions are met:
((PositionValueChain_SQ009.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ010.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (AuthorisationExp_SQ002.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

	Assessment for authorisation	Enforcement
0: Unchanged policy and regulation: the legal framework of today applies unchanged in 2030-2035		
A1: Authorisation with proportionate risk assessment and adapted detection method requirements		
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding		
B1: Additional sustainability label		
B2: No labelling if sustainable		
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding		
C1: Sustainability incentives for authorisation		
C2: Sustainability requirement: no authorisation if detrimental to sustainability		

Questions on costs for authorities - Costs related to field trials

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	Labelling (GMO-specific requirements)	Traceability (GMO-specific requirements)
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

To what extent do you expect that the costs related to field trials will change in scenarios 0, A, B and C in 2030-2035?

Only answer this question if the following conditions are met:
((PositionValueChain_SQ009.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ010.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (AuthorisationExp_SQ001.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59743) == "Y"))

	Assessment for authorisation	Enforcement
0: Unchanged policy and regulation: the legal framework of today applies unchanged in 2030-2035		
A1: Authorisation with proportionate risk assessment and adapted detection method requirements		
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding		
B1: Additional sustainability label		
B2: No labelling if sustainable		
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding		
C1: Sustainability incentives for authorisation		
C2: Sustainability requirement: no authorisation if detrimental to sustainability		

Questions on costs for authorities - Other costs

The following questions regard costs related to any of the following (previously shown) scenarios. All scenarios are for your reference depicted below.

A - Scenario for 2030-2035	Risk assessment	Detection
0: As today: the legal framework of today applies unchanged in 2030-2035	As today: risk assessment according to current requirements of GMO legislation	As today: detection required with differentiation from conventional product
A1: Authorisation with proportionate risk assessment and adapted detection method requirements	**Proportionate to the NGT product's risk profile**	**Detection method required but differentiation of NGT product from conventional product not required if not technically possible**
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**	**Not needed if NGT-based product can also be obtained naturally or by conventional breeding**

B - Scenario for 2030-2035	Labelling (GMO-specific requirements)	Traceability (GMO-specific requirements)
0: Unchanged policy and regulation (baseline)	As today: labelling as a GMO is always required	As today: traceability of the GMO is always required
B1: Additional sustainability label	**As today, but with possibility of additional label for sustainability claims, referring to the sustainability contribution of the introduced trait**	**As today, but with additional traceability for sustainability claims**
B2: No labelling if sustainable	**No specific labelling needed, only inclusion in public registry if NGT product contributes to sustainability**	As today

B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding	**Not needed if NGT product can also be obtained naturally or by conventional breeding, only inclusion in public registry**	**Not needed if NGT product can also be obtained naturally or by conventional breeding**

C - Scenario for 2030-2035	Authorisation
0: Unchanged policy and regulation	As today: no sustainability requirements/incentives for authorisation
C1: Sustainability incentives for authorisation	**Positive regulatory incentives for authorisation:** NGT plant products with traits that contribute to sustainability objectives receive positive regulatory incentives for authorisation (e.g. regulatory and scientific advice before and during approval procedure, measures to facilitate approval process (waiving of fees, faster procedures, allowing sustainability-related claims to appear on the final product).
C2: Sustainability requirement: no authorisation if detrimental for sustainability	NGT Plant products with traits that are detrimental to sustainability objectives are not authorised

Should you know of any other costs for authorities (i.e. costs not described in the previous sections), please describe below these other costs for each of the individual scenarios for 2030-2035.

Only answer this question if the following conditions are met:
((PositionValueChain_SQ009.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y") or (PositionValueChain_SQ010.NAOK (/admin/questions/sa/view/surveyid/959299/gid/2681/qid/59738) == "Y"))

	For use of food and feed and the importation into the territory of the European Union	Other costs for cultivation	Other costs for field trials
0: Unchanged policy and regulation: the legal framework of today applies unchanged in 2030-2035			
A1: Authorisation with proportionate risk assessment and adapted detection method requirements			
A2: Pre-notification of products that are also obtainable naturally or by conventional breeding			
B1: Additional sustainability label			
B2: No labelling if sustainable			
B3: No labelling and traceability if a product is also obtainable naturally or by conventional breeding			
C1: Sustainability incentives for authorisation			
C2: Sustainability requirement: no authorisation if detrimental to sustainability			

Feedback

Do you have any comments regarding this survey that you would like to share with the study team?

Please write your answer here:

Thank you for your participation to this survey. Your responses have been stored and shared to the study team. You can now close this window.

Submit your survey.
Thank you for completing this survey.