



European Bioeconomy Panel

2nd Plenary meeting

Wednesday 12 and Thursday 13 February 2014

Summary of discussions

This was the second meeting of the European Bioeconomy Panel. The overall aim of the panel is to support interactions among different policy areas, sectors and stakeholders in the bioeconomy. The panel has 30 members, who each represent one of four different stakeholder groups: producers, enterprises and industry; universities, research organisations and the scientific community; public administrations; and civil society. The panel members were selected further to an open call for applications. The creation of the panel is an important element of the European Commission's bioeconomy strategy and action plan, which were adopted in 2012.¹

1. Opening and welcome

The meeting was co-chaired by John Bell, Director, Bioeconomy, DG Research and Innovation, and by Reinhard Buescher, Head of Unit, Chemicals Industry, DG Enterprise and Industry. In their opening remarks they highlighted some important developments in EU policy which will influence the development of the bioeconomy: the launch of Horizon 2020; the adoption by the Commission of proposals for climate and energy policy in the period 2020 to 2030; and a new Commission communication on industrial policy.

They also recalled that this was the final year of the mandate of the current European Commission. As such, it was an important time to take stock of progress and to identify proposals for consideration by the next Commission.

It was announced that, further to a change in employment, panel member Sarunas Zableckis has resigned from the panel. A decision would be made in due course about whether and how to replace him.

¹ See http://ec.europa.eu/research/bioeconomy/pdf/bioeconomycommunicationstrategy_b5_brochure_web.pdf

2. Review of the implementation of the European bioeconomy Strategy and Action Plan

The Commission gave a presentation of progress in the implementation of the Bioeconomy Action Plan, based on a more detailed table distributed to participants before the meeting. Panel members commented on a number of issues, including:

- The importance of public procurement as a means of creating markets for innovative products in the bioeconomy.
- The need for a greater focus on identifying and addressing the full range of obstacles to the development of the bioeconomy, beyond the specific actions already identified in the action plan. Trade policy is an example of a policy that is relevant to the bioeconomy but not currently considered in the action plan.
- The need to increase knowledge and understanding of consumer behaviour, including consumer perception of bio-based products.
- The Commission should consider how to further support European Technology Platforms.
- It would be useful to have better information about the intentions of individual regions in the bioeconomy. This would allow other actors to focus their attention on regions known to be making the bioeconomy a political priority.
- The Commission should consider being more explicit in recommending that Member States establish national bioeconomy panels – this could catalyse action in Member States where such panels have not yet been established.
- The Commission should consider promoting the bioeconomy during the EXPO2015 which will be organised in Milan around the theme of "Feeding the planet".

The Commission underlined the need to shift the emphasis from monitoring inputs to being able to better monitor impacts.

3. Stakeholder hearing: "Trade unions and workers"

The hearing was based on presentations from three invited speakers:

- i. Jesper Lund-Larsen, Political Advisor, United Federation of Danish Workers: The bioeconomy has the potential to create significant number of new jobs. In the Danish context, that potential exists in four particular areas: biomass production at municipal level; recycling and waste processing; biofuel for ships; and the construction and operation of biorefineries. New health and safety issues, and the need for education and skills development, must be addressed.

- ii. Sue Longley, Coordinator Global Agriculture, International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF): Agriculture provides employment for 1 billion people, 35 % of global employment. There is a need to ensure that jobs in agriculture are decent jobs. Specific challenges include: non-respect of fundamental freedoms (such as the right to belong to a trade union); health and safety (agriculture is the most dangerous sector of employment alongside mining and construction); seasonal work and the rights of migrant workers; the growing number of women workers in agriculture and the implications of this in terms of equal pay and other issues; and child labour (which decreased from 245 million in 2000 to 168 million in 2012, of which 58% is in agriculture). These issues were considered through the example of palm oil. Food companies should be pressured to carry out due diligence through their supply chains. The right to food should be at the heart of the food system. The Commission is correct to emphasise skills development for the bioeconomy, but should also address working conditions and decent jobs.
- iii. Edmundo Werna, Head of Unit, Natural Resources and Industries, Sectoral Activities Department, International Labour Organisation: The aggregate labour market effects of the development of the bioeconomy may be modest, but the skills challenge could be big because carbon intensive industries, which will decline of the bioeconomy thrives, have a proportionately higher concentration of low-skilled workers who would need re-training. Action to address the skills challenge should focus on: initial vocational training and higher education; active labour market policies; and continuous training. ongoing There are 4 proposed focus areas for policy action: (a) Meeting new skills requirements; (b) Helping workers to move from declining firms and sectors to growing ones; (c) Assuring workers' rights and seizing opportunities in growing bio-sectors; and (d) Strengthening labour market information systems and social dialogue for better understanding and strategising.

A representative from the Commission's DG Employment and Social Affairs spoke about a new Green Employment Initiative scheduled for adoption in May 2014. The environmental goods and services sector currently accounts for some 4.2 million jobs in the EU. One of the main drivers of change in employment in the future is the greening of the economy as a whole, as opposed to the further growth of employment in specific green sectors. The Green Employment Initiative will address three challenges: skills shortages and the transition to new employment; the lack of data on employment and skills in the green economy; and inefficient governance structures and lack of effective partnerships.

Comments from participants:

- Sustainability assessments for biomass should address the social as well as the environmental dimension.

- Europe imports substantial quantities of biomass from developing countries. We share some responsibility for social concerns that may be linked to the production of that biomass.
- There is a need for greater clarity about the new skills that are required for the bioeconomy: are these a set of generic skills, or are they varied and specific?
- The bioeconomy should provide a new model for social and economic development, including the regeneration of regions in Europe that have been negatively affected by globalisation. The social dimension of the bioeconomy is therefore critical: sustainable industry and sustainable society go together.
- On the other hand, the trend in oil refining is for very large facilities, located at coastal sites and often with poorly paid workers. Will a bioeconomy model of smaller refineries, located close to the production of biomass and with better paid rural jobs, be competitive?
- According to evidence presented at the closing conference of three biorefinery projects financed under FP7 (SUPRABIO, BIOCORE and EUROBIOREF), for every one job created in a biorefinery, a further 5-10 can be created in the biomass value chain.²

The Commission concluded the hearing by stressing the potential of the bioeconomy to 'localise' jobs within the EU and its regions.

4. Bioeconomy Observatory

The Commission (Joint Research Centre) reported on progress in the establishment of the Bioeconomy Observatory, and on the first meeting of the Bioeconomy Panel-Observatory Contact Group held on 12 February. The 1st Observatory Stakeholders Roundtable was held in November 2013, and the draft methodology for the observatory has since been made available for comment. Important work in progress includes: a joint JRC-SCAR survey of Member States, covering policies and research; a bio-based industries survey; the development of a template for bioeconomy country profiles; and the development of a prototype website. Attention was drawn to the JRC's existing DataM online database (www.datamweb.com), which provides information on agricultural markets and production.

Comments from panel members:

- The strategic importance of the Observatory, and general appreciation of the work done by the JRC to date.
- The Observatory must include Member States from Central and Eastern Europe.

² www.suprabio.eu/events/final-conference/

- Benchmarks should be established so that we can measure progress.
- Successful measurement of the bioeconomy can only be done if an adequate means is found to measure hybrid (bio and non-bio) sectors and processes.
- The Observatory should help to map policy developments related to bioeconomy, both at EU and Member States level.

The Commission concluded that:

- Benchmarking progress in the development of a sustainable and inclusive bioeconomy is a critical task.
- We need to understand and speak the language of the providers of financial capital, both private and public. Ideally we should have figures on investment as a whole in the bioeconomy, not just investment in R&D.
- The collection of data should not be limited to the 'usual suspects'. We cannot have a two-speed bioeconomy in the EU.
- The production of "national bioeconomy country profiles" by the Observatory would be helpful for discussions between the Commission and the Member States.
- Input from the Panel would be welcome related to possible targets and indicators of success for the development of the bioeconomy.

5. Discussion with Waldemar Kütt, Head of Cabinet of Commissioner Geoghegan-Quinn

Waldemar Kütt, Head of Cabinet, replaced Commissioner Geoghegan-Quinn for this session, who was unable to attend because of illness. Mr. Kütt underlined the potential of the bioeconomy to define our future model of social and economic development, in the context of the Europe 2020 strategy for smart, sustainable and inclusive growth. He framed this discussion as an opportunity to help define the priorities that should be addressed by the next European Commission.

Panel members made the following proposals:

- Policy coherence should be improved. This could be done by establishing a Council of Commissioners for the Bioeconomy, which would meet with ministers from Member States and non-EU countries, and push forward a limited number of practical actions. Policy coherence has a horizontal dimension (a single policy across the various Commission departments or national ministries), and a vertical dimension (a single goal with different measures at EU, national and regional levels).

- Address the barriers to investment in the bioeconomy. This would include reforming state aid rules, and promoting a smarter, more integrated use of EU structural funds.
- Ensure that our understanding of the bioeconomy includes farmers and sustainable farming, and does not focus just on industry with agriculture in a support function only.
- Focus on sustainable raw material supply and resource efficiency. In particular, a clear and balanced policy is required regarding the use of biomass for energy and for other uses. As for bioenergy, demand for bio-chemicals could be increased by specific consumption targets or mandates or overall GHG emissions reduction requirements for the specific sector.
- The EU should lead the development of internationally harmonised sustainability criteria for biomass, including social and environmental dimensions, without which we cannot define how much biomass can be grown sustainably. Experience gained with the implementation of the biofuels criteria should be useful in this regard.
- Set long term consumption targets, to 2030, for next generation biofuels (as the US has done), in order to give assurance to investors in this sector.
- Market incentives should be established, including the use of public procurement and product standards. The use of wood in buildings, for example, could be incentivised: 90% of US houses have wooden frames, only 9% in the EU. Tripling the use of wood in construction is one of the forest-based sector's 10 targets for 2030. These targets could serve as part of the vision and possible targets for the bioeconomy as a whole.
- The EU should agree a target to become self-sufficient in protein supply. This would have positive environmental consequences, and would be an opportunity for farmers and biorefineries.
- Improve the level of general understanding of the term 'bioeconomy', and better communicate its sustainability benefits, on the basis of measurements and indicators.
- The Common Fisheries Policy should fully incorporate an ecosystems-based management approach, as opposed to single-stock management practices.
- Need to unlock the potential of EU aquaculture through coastal and offshore marine developments – in particular the integration of separate activities (such as wind-farms with aquaculture), and at a large scale to be able to have impact.
- Much more focus on innovation-based value-added products (food supplements, additives, bio-disinfectants) obtained by biorefinery or from food industry waste.
- Train professionals with the adequate skills to operate in the bioeconomy.

- Create a platform or award to highlight the individual pioneers, in enterprises and in education and research, who are making the bioeconomy a reality.
- Protect soil fertility.

Rogier Van der Sande, Committee of the Regions' observer to the Bioeconomy Panel, underlined the role that regions can play in terms of mobilising citizens and regional actors in support of the bioeconomy. He called for more and stronger actions at regional level in this field, such as the creation of more regional bioeconomy panels.

The Commission noted in particular the emphasis placed on policy coherence and on the governance required to achieve that, and concluded that the ideas presented should be further refined and prioritised in order to inform decisions taken by the next European Commission and European Parliament.

6. Thematic Working Group "Biomass Supply"

Dorette Corbey, coordinator of the Biomass Supply Working Group, introduced the draft paper that had been prepared with inputs from TWG members and circulated to participants before the meeting. The paper proposes some general principles (including on sustainability and on a level playing field between different sectors regarding access to biomass), and then addresses a number of questions such as the definition of sustainable biomass, biomass availability in the EU and globally, and technological developments to increase supply.

Other panel members made a number of comments, covering the following issues:

- On sustainability of biomass: focus on the criteria and definitions of sustainability should not hinder progress in the bioeconomy; sustainability criteria for biofuels may provide a useful starting point, but account would also need to be taken of differences between biofuels and bio-based products; CEN is working on sustainability criteria for bio-based products; substitution effects should be considered when measuring sustainability; the relative weight of different sustainability criteria should vary geographically across the EU (e.g. because soil depth is very different); soil fertility is an important aspect of sustainability; two international certification schemes for sustainable forest management exist today (PEFC and FSC), offering credible criteria for a sustainable, renewable raw material supply of wood.
- New technologies must be made available at farm level if they are to increase productivity.
- Increases in demand for biomass can be limited by action to prevent food waste, and by change in consumption patterns (e.g. lower meat consumption).
- The need to have different solutions in different parts of Europe (no one size fits all).

- Care is required in implying "equal access" to biomass between all end uses: food use should be prioritised where there is no alternative source of food.
- The marine environment needs more consideration when considering Europe's biomass production potential.
- If we just import more biomass, we miss the potential of the bioeconomy to regenerate European regions.
- There is significant potential to increase biomass production: a study has found that Denmark could double its biomass production.³
- Demand for biomass could continue to rise: if all planned biomass plants in the UK were actually built, it would imply a 29-fold increase in biomass imports.⁴
- A large part of the price of biomass comes from transport costs. Measures should be taken to reduce such costs.

The Commission concluded that there is a need for an overview of data and issues on biomass supply and demand, and the TWG should contribute to this task. The TWG should provide a rigorous and clear reference paper that also illustrates examples of what works in practice. A working definition of sustainability should be sufficient for the purposes of such a paper. The paper itself should not seek to define sustainability criteria.

The Commission (Jeremy Wall, DG Enterprise and Industry) presented the results of a recent study which evaluated wood raw material supply and demand for the EU wood-processing industries and biomass-based bio-energy sector, and identified the inter-actions between these sectors in the context of the prevailing policy and legislative frameworks and their consequences for the global competitiveness of EU wood-processing.⁵ Main quantitative conclusions:

- The EU annual wood harvest should grow from 436 to 454 Mm³ by 2016, but further increase will be constrained by limited availability of forest area.
- By 2016 a 63 M m³ wood raw material supply shortfall will exist for bio-energy. Without remedial measures, imports of wood (e.g. pellets) from North America, Russia and other countries will increase significantly.
- The EU "cascade factor" (multiplier of wood re-use) rose from 1.96 to a projected 2.10 in 2016. However, if forest residues are included, their increased use for bio-

³ The +10 Million Tonnes Study <http://curis.ku.dk/ws/files/47425822/TimioplanUKnet.pdf>

⁴ "Bioenergy: a burning issue", Royal Society for Protection of Birds:
http://www.rspb.org.uk/Images/Bioenergy_a_burning_issue_1_tcm9-288702.pdf

⁵ http://ec.europa.eu/enterprise/sectors/wood-paper-printing/documents/index_en.htm

energy reduces the factor to 1.83 by 2016, against the trend needed to meet biomass demand from the emerging bio-economy.

The main qualitative conclusion was that whereas bio-energy can be produced from combusting any wood, the manufacture of wood-based products depends on specific varieties, qualities, dimensions and quantities of wood. Thus, not all wood types are mutually substitutable. The main recommendations highlighted were: (1) Supply of domestic EU wood can be addressed through better motivation and organisation of the owners of small private forests, wider use of forest residues and wood from outside the forest, and more recovery of used wood, using standards and legislation; (2) Bio-energy generation from (woody) biomass and its use must be efficient, to reduce pressure on wood supplies and prices. Combined heat and power (CHP) should be prioritised.

7. Thematic Working group "Market-making in the bioeconomy"

Joanna Dupont, coordinator of the Market-Making Working Group, introduced the discussion paper that had been circulated to participants before the meeting, and emphasised the following issues for building markets in the bioeconomy: long-term political support; policy coherence; funding; public awareness and engagement; demand-side measure such as standardisation, certification, labelling and procurement; reducing time to market; and skills.

Two cases studies were presented:

- i. Italian Bio-plastics (Catia Bastioli, panel member and CEO of Novamont): The adoption of clear and simple norms in the area of separate collection of organic waste, and the evolution of research and innovation in the field of biodegradable and compostable plastics from renewable origin (bio-plastics), has triggered new investments in biorefineries with societal and environmental benefits in terms of job creation, rural and coastal regeneration, waste prevention and the introduction of sustainable consumption patterns.
- ii. The World's Largest Advanced Biofuels Facility (Piero Cavigliasso, Biochemtex): The Crescentino plant, co-financed by FP7, is the first industrial scale plant built to demonstrate the production of bioethanol from agricultural residues and energy crops using enzymatic conversion. Using wheat straw, rice straw and arundo donax cultivated on marginal land, it creates economic, environmental and social opportunities. Such projects require high initial capital expenditure. Land and waste resources are in principle available for such projects to be replicated, but key element need to be addressed: a supply of biomass that is sustainable and perceived to be so by key stakeholders; access to credit/loan guarantees, in addition to or even as an alternative to grants; and above all, clear, stable and positive policy framework. At the moment such conditions are better met in Brazil, US and China than in the EU.

Comments from panel members:

- The reconversion of old petrochemical plants into new bio-plants should be a big selling point for biorefineries and the bioeconomy as a whole.
- Compared to the US, capital markets in the EU are not adapted to the needs of SMEs wanting to invest in innovative solutions.

The Commission concluded that the case studies had been very valuable in terms of illustrating both the potential of the bioeconomy in practice, and barriers to its further development. Such examples should form the basis of both working group reports. The market-making TWG should continue to search for and to present insights into what is needed to develop markets. The inputs of investors would be important in this regard. We need to address the failures of capital markets in the EU with regard to the bioeconomy. Changing the policy framework takes a number of years and there is no magic solution to do this in the short-term. It is however reasonable to expect a predictable policy framework, although more clarity is needed regarding which particular aspects of the framework need to be predictable.

8. Discussion with the Standing Committee on Agricultural Research (SCAR)

Annette Wiejering, member of SCAR and representative of the Dutch Ministry of Economic Affairs, gave an introduction to SCAR activities and to synergies and possible cooperation between SCAR and the Bioeconomy Panel. She drew attention to the 4th SCAR foresight process, recently launched; the Strategic Working Group on sustainable use of bio-resources for a growing bioeconomy (which is cooperating with the Observatory on a survey of Member States' bioeconomy policies); the Collaborative Working Group on Biorefineries; and SCAR work on ERA-NETs and joint programming initiatives, including the JPI on Climate Change and Agriculture (FACCE).

Panel members noted the large amount of common ground between SCAR and the Bioeconomy Panel, and that two panel members are also active in SCAR. There should be regular interaction, including through individuals who attend meetings of both groups.

The Commission noted that the same Commission official chairs both SCAR and the panel. Strong, pragmatic cooperation between SCAR and the panel is required to maximise the capacity of both groups, but without creating burdensome new procedures or meeting requirements.

9. Closing remarks

The co-chairs emphasised the following points in their closing remarks:

1. The next meeting will probably be in early/mid-September. It will serve to agree the outputs of the two thematic working groups, prior to their presentation in the Italian Presidency Conference in Turin (8-9 October). The Commission proposes that a stakeholder hearing with the investment community also forms part of the next meeting.
2. The bioeconomy covers resources from land and sea. The marine dimension should be adequately reflected in the panel's work.
3. The TWG outputs must contain actionable conclusions. They must identify concrete actions that help to move from analysis to delivery, from the abstract to the practical.
4. Data included in the TWG reports must be carefully checked, to avoid the risk that the reports are undermined by challenges to data they contain.
5. The next meeting, the Turin conference and the release of the TWG outputs are all the more important because they will coincide with the arrival of a new European Parliament and new European Commission.
6. The Commission will contact panel members to request 2 additional tasks: identifying possible targets and indicators of success for the development of the bioeconomy; and summarising and prioritising the proposals prepared for the discussion with the Commissioner/Head of Cabinet.
7. The SCAR, and the JRC team responsible for the Bioeconomy Observatory, are key relationships that the panel should seek to reinforce. The panel should also consider the work of the European Resource Efficiency Platform.

Annex 1: List of participants

Members of the Bioeconomy Panel

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| Barjolle Musard | Dominique | FiBL - Research Institute of Organic Farming, and ETHZ - Swiss Federal Institute of Technology |
| Bastioli | Catia | Novamont SPA |
| Bielecki | Stanislaw | Lodz University of Technology |
| Bunthof | Christine | Stichting Dienst Landbouwkundig Onderzoek DLO (part of Wageningen UR) |
| Corbey | Dorette | Dutch panel on sustainable biomass (Chairman) Dutch Emissions Authority (Chairman) Council on science and innovation (AWT) (Director) |
| Cudlinova | Eva | University of South Bohemia, Economic faculty department Structural policy of EU and rural development |
| Dupont-Inglis | Joanna | EuropaBio - The European Association of Bioindustries |
| Elvnert | Johan | Forest-Based Sector Technology Platform |
| Gøtke | Niels | Ministry of Science, Innovation and Higher Education - Danish Agency for Science, Technology and Innovation |
| Hough | Courtney | Federation of European Aquaculture Producers |
| Howell | Richard | Irish Department of Agriculture, Food and the Marine |
| Ivarsson | Kjell | Federation of Swedish Farmers (LRF) - member of Copa and Cogeca |
| Kettlitz | Beate | FoodDrinkEurope |
| Kurppa | Sirpa | MTT Agrifood Research Finland |
| Millan-Chacartegui | Carmen | Abengoa Bioenergia Nuevas Tecnologias |
| Papadopoulou | Electra | CHIMAR Hellas S.A. Greece |
| Philp | Jim | Organisation for Economic Cooperation and Development (OECD) |
| Pickel | Peter | John Deere GmbH & Co. KG European Technology Innovation Center |

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| Rupp-Dahlem | Christophe | Roquette Frères |
| Schintlmeister | Peter | Federal Ministry of Economy, Family and Youth, Austria |
| Schnabel | Doris | Ministry of Innovation, Science and Research of the German State of North Rhine-Westphalia |
| Silva | Cristina | Catholic University of Portugal - Biotechnology College |
| Socaciu | Carmen | University of Agricultural Sciences and Veterinary Medicine (USAMV), Cluj-Napoca, Romania |
| Sormann | Monika | Flemish Government - Department Economy, Science and Innovation |
| Tičina | Vjekoslav | Institute of Oceanography and Fisheries |
| Zinke | Holger | BRAIN Aktiengesellschaft |

Panel members Emilia den Boer, Hordur Kristinsson, and Nathaniel Page were unable to attend.

Bioeconomy Panel Observers

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| van der Sande | Rogier | Committee of the Regions |
| Maciulevicius | Mindaugas | European Economic and Social Committee |

Invited speakers

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| Lund-Larsen | Jesper | United Federation of Danish Workers |
| Longley | Sue | International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF) |
| Werna | Edmundo | International Labour Organisation |
| Wijering | Annette | Ministry of Economic Affairs, The Netherlands |
| van Esch | Jan | Ministry of Economic Affairs, The Netherlands |
| Cavigliasso | Piero | Biochemtex |

European Commission

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| Kütt | Waldemar | Head of Cabinet of Máire Geoghegan-Quinn, Commissioner for Research, Innovation and Science |
| Bell | John | DG Research and Innovation, Director |
| Di Giulio | Antonio | DG Research and Innovation, Head of Unit |
| Balzi | Elisabetta | DG Research and Innovation, Deputy Head of Unit |
| Arnold | Thomas | DG Research and Innovation, Advisor |
| Verachtert | Barend | DG Research and Innovation, Head of Unit |
| Amato | Davide | DG Research and Innovation |
| Constantin | François | DG Research and Innovation |
| Cortopassi | Marco | DG Research and Innovation |
| Dodd | Tom | DG Research and Innovation |
| Jagot | Charlotte | DG Research and Innovation |
| Kovacs | Barna | DG Research and Innovation |
| Lecoq | Eveline | DG Research and Innovation |
| Mega | Voula | DG Research and Innovation |
| Peres | Adrian | DG Research and Innovation |
| Presset | Paul | DG Research and Innovation |
| Gumma i Solernou | Pilar | DG Agriculture |
| Volpi | Giulio | DG Energy |
| Buescher | Reinhard | DG Enterprise and Industry, Head of Unit |
| Boenke | Achim | DG Enterprise and Industry |
| Juhasz | Hilda | DG Enterprise and Industry |
| Wall | Jeremy | DG Enterprise and Industry |
| Owczarzak | Radosław | DG Employment and Social Affairs |
| Miladinova | Gergana | DG Regional Policy |

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|---------------|---------|-----------------------|
| Plan | Damien | Joint Research Centre |
| Reale | Paola | Joint Research Centre |
| Landa | Leticia | Joint Research Centre |
| M'Barek | Robert | Joint Research Centre |
| Gomez Barbero | Manuel | Joint Research Centre |

Annex 2: Agenda

Wednesday February 12

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| 14.00 – 14.15 | Opening and welcome <ul style="list-style-type: none">• John Bell, Director, Bioeconomy, DG Research and Innovation• Reinhard Buescher, Head of Unit, Chemicals Industry, DG Enterprise and Industry |
| 14.15 – 15.30 | Review of implementation of European Bioeconomy Strategy <ul style="list-style-type: none">• On basis of document and presentation from Commission services• In 3 sections, one section per pillar |
| 15.30 – 16.00 | Coffee |
| 16.00 – 17.30 | Stakeholder hearing: "Trade unions and workers" <ul style="list-style-type: none">• Jesper Lund-Larsen, Political Advisor, United Federation of Danish Workers (15 minutes)• Sue Longley, Coordinator Global Agriculture, International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF) (15 minutes)• Edmundo Werna, Head of Unit, Natural Resources and Industries, Sectoral Activities Department, ILO (International Labour Office) (15 minutes)• Discussion |

Thursday February 13

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| 9.15 – 10.00 | Discussion with representative(s) of the Standing Committee on Agricultural Research (SCAR) <ul style="list-style-type: none">• Introduction by Annette Wijering, SCAR representative and Head of Unit, Dutch Ministry of Economic Affairs, Department of Knowledge and Innovation• Discussion, including about future interaction between the Bioeconomy Panel and the SCAR (in particular the SCAR Working Group "Sustainable Bioresources for a Growing Bioeconomy") |
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| 10.00 – 11.00 | Discussion with Commissioner Geoghegan-Quinn <ul style="list-style-type: none">• Introduction from chair and introductory remarks from Commissioner Geoghegan-Quinn (5 minutes)• First 5 panel representatives each have 3 minutes to present their answers to the question: "What is the single most important thing the Commission could do to promote the bioeconomy over the next 5 years?" (15 minutes total, no powerpoints)• Discussion, including reaction from the Commissioner (10 minutes)• Second panel representatives each have 3 minutes (15 minutes)• Discussion, including reaction from the Commissioner (10 minutes)• Closing remarks from the chair and the Commissioner (5 minutes) |
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| 11.00 – 11.30 | Coffee |
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| 11.30 – 12.45 | Thematic Working Group "Biomass supply" <ul style="list-style-type: none">• Introduction and presentation of start-up paper: Dorette Corbey, TWG Coordinator• Discussion |
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| | <ul style="list-style-type: none"> • Case study: "Study on the Wood Raw Material Supply and Demand for the EU Wood-processing Industries", Jeremy Wall, DG Enterprise and Industry, European Commission (15 mins) • Discussion |
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| 12.45 – 14.00 | Lunch |
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| 14.00 – 15.15 | Thematic Working Group "Market-making" <ul style="list-style-type: none"> • Introduction and update on progress: Joanna Dupont, TWG Coordinator • Case study: "The Italian bio-plastics market", Catia Bastioli, Novamont (15 mins) • Case study: "Europe's first lingocellulosic bioethanol refinery", Piero Cavigliasso, Biochemtex (15 mins) • Discussion |
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| 15.15 – 16.00 | Bioeconomy Observatory <ul style="list-style-type: none"> • Update from JRC, identifying any questions for consideration by the panel • Discussion |
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| 16.00 – 16.15 | Any other business |
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| 16.15 – 16.30 | Closing remarks <ul style="list-style-type: none"> • Reinhard Buescher, Head of Unit, Chemicals Industry, DG Enterprise and Industry • John Bell, Director, Bioeconomy, DG Research and Innovation |
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