

Joint JRC - SCAR survey



Bioeconomy implementation in Member States

*Results of the joint JRC - SCAR survey
September 2014*

Hans Langeveld

Biomass Research

hans@biomassresearch.eu

Joint JRC - SCAR survey



Context

- JRC Bioeconomy observatory
 - Collect key data on Bioeconomy policy, R&D
 - Preparing MS country profiles

- Standing Committee on Agricultural Research
 - 28 Member States, 11 Observers
 - Strategic Working Group on Bioresources

- Joint JRC – SCAR MS survey
 - Implemented by Biomass Research (contract No CCR.PSR.B182795)

Joint JRC - SCAR survey



Structure of the questionnaire

→ Policy

- Q1: Definition of the bioeconomy
- Q2: Main drivers
- Q3: Bioeconomy policies, authorities, clusters, regions

→ Research & Development

- Q4: R & D programmes
- Q5: Research projects, success stories
- Q6: European research cooperation

Joint JRC - SCAR survey



Response

→ Numbers

- 38 Questionnaires sent (28 Member States, 10 Observers)
- 20 Questionnaires returned (19 countries; 2 for Belgium)

→ Final response

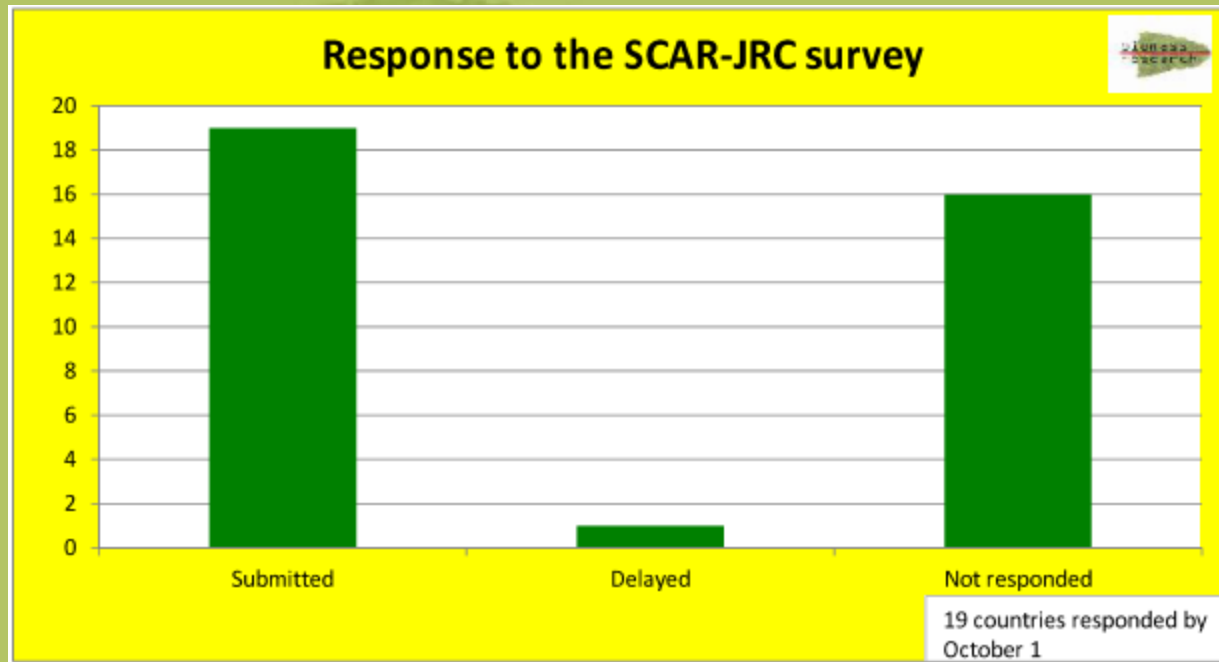
- 19 Countries, 20 questionnaires: BE (2x), CH, CZ, DE, DK, EE, ES, FI, FR, HU, IE, IL, IT, NL, NO, SE, SI, TR, UK

→ Many fully elaborated, some incomplete, one delayed

Joint JRC - SCAR survey



Response



Joint JRC - SCAR survey



EU definition: 'The bioeconomy encompasses the production of renewable biological resources and their conversion into food, feed, bio-based products and bioenergy. It includes agriculture, forestry, fisheries, food and pulp and paper production, as well as parts of chemical, biotechnological and energy industries. Its sectors have a strong innovation potential due to their use of a wide range of sciences (life sciences, agronomy, ecology, food science and social sciences), enabling and industrial technologies (biotechnology, nanotechnology, information and communication technologies (ICT), and engineering), and local and tacit knowledge'

- 11 Countries apply a definition similar to the EU;
8 countries apply no or a different definition

Definition: Commission Staff Working Document of COM(2012) 60 final. Innovation for Sustainable Growth. A Bioeconomy for Europe.

Joint JRC - SCAR survey



Results: Bioeconomy policy

→ Strategy and organization

- 9 Countries apply a Bioeconomy strategy (56%)
- Full strategy: Germany, Finland, Sweden, Flanders (Be)
- Partial strategy: Switzerland, Denmark, Estonia, Netherlands, Wallonia (Be)

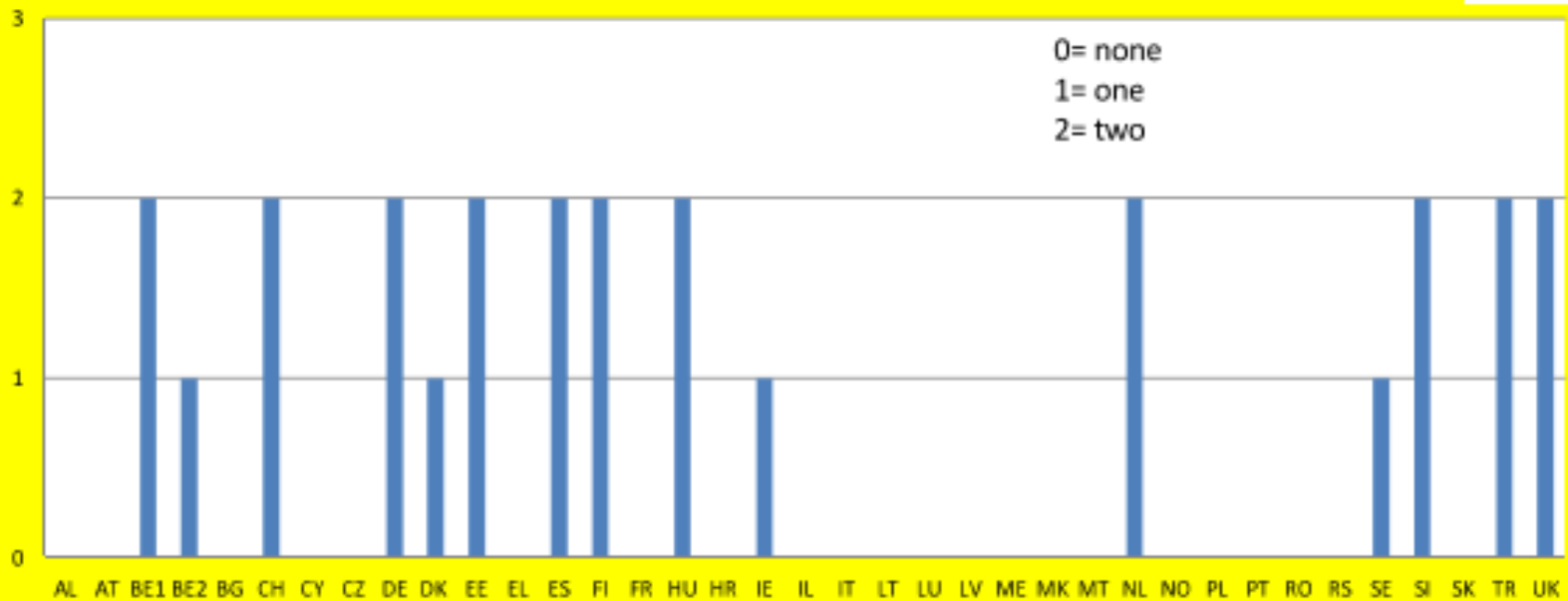
→ Organization

- 13 Countries put one/several ministries in charge
- 6 Countries installed an advisory body
- 6 Countries installed a BE agency

Joint JRC - SCAR survey



Q3a Number of ministries in charge



Joint JRC - SCAR survey



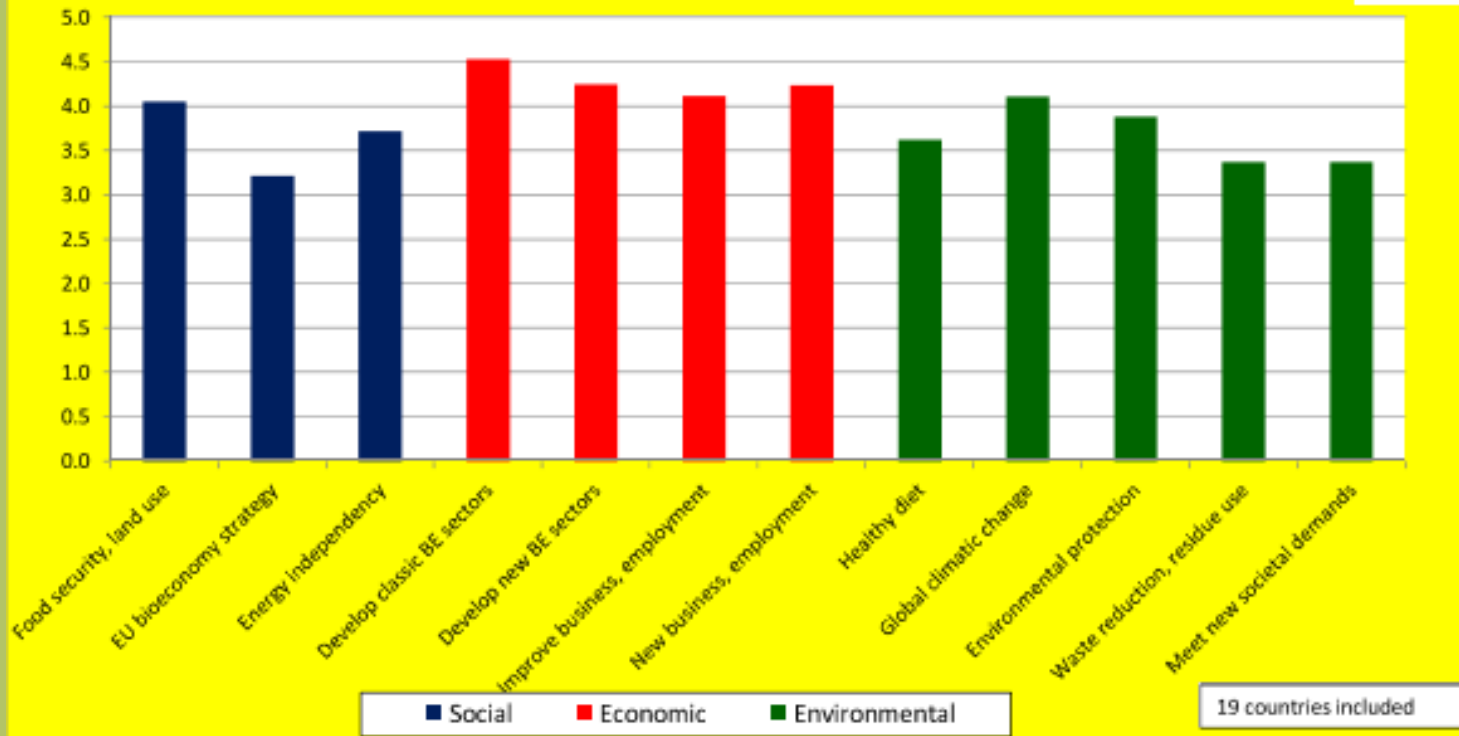
Analysis: drivers

- Reasons to implement BE policy
 - Social (e.g. food security, land use issues)
 - Economic (classic or new business)
 - Environmental (e.g. climate change)
- Scores
 - All drivers very relevant to very important
 - Economic drivers tend to dominate
 - Relatively small differences

Joint JRC - SCAR survey



Q2 Bioeconomy drivers - national priorities



Joint JRC - SCAR survey



Analysis: public R & D funding

- Annual Bioeconomy budget: 12.2 billion €
 - Over 90% allocated to agriculture
 - Relatively small budgets for forestry, food value chains, industrial biotechnology
- Large national differences
 - Germany dominates

Joint JRC - SCAR survey



Analysis: transnational cooperation

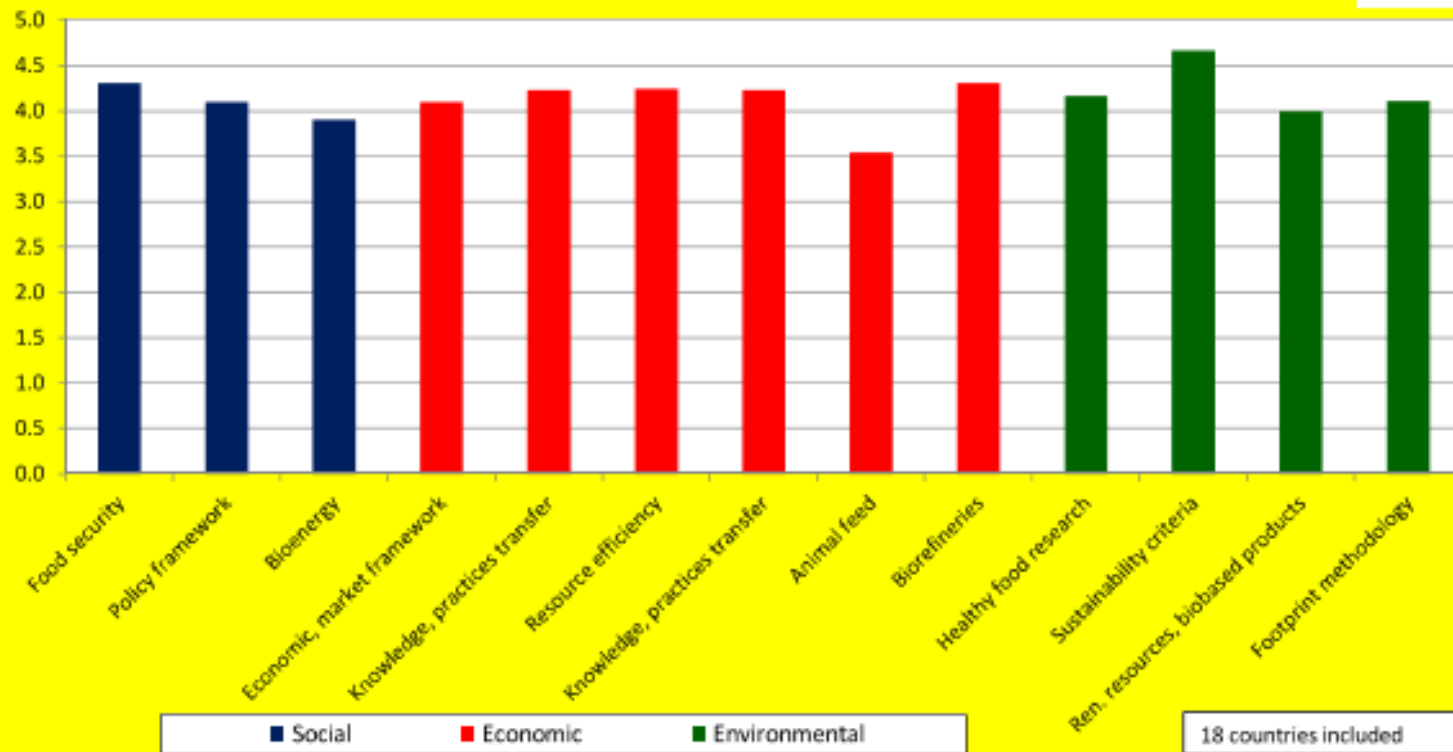
- Perspectives for international R&D programmes
 - Large benefits for international cooperation
 - Ranking is perceived as difficult exercise

- Highest scores
 - Sustainability criteria
 - Biorefineries
 - Resource efficiency
 - Knowledge transfer

Joint JRC - SCAR survey



Q6 Perspectives for R&D cooperation- national priorities



Contact



Damien Plan

JRC

Brussels, Belgium

Damien.PLAN@ec.europa.eu

Jan van Esch

Ministry of Economic Affairs

The Hague, The Netherlands

j.w.j.vanesch@minez.nl

Hans Langeveld

Biomass Research

hans@biomassresearch.eu