



RESULTS OF THE JRC-SCAR BIOECONOMY SURVEY

Including national report for France

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1. INTRODUCTION

Unprecedented and unsustainable exploitation of natural resources, potentially irreversible changes in the global climate and the lack of ability to stop the loss of biodiversity form a serious threat to the biological basis of the European society. Over the next decades, the global population is expected to increase to exceed 9 billion in 2050. These complex and inter-connected challenges will need to be addressed by an integrated and effective policy combined by an extended programme for scientific research and innovation in order to facilitate sustained changes in lifestyle and resource use across all levels of the economy.

In order to be able to cope with increasing global population, (over)exploitation of natural resources, increasing environmental pressure and climate change, Europe has to change the way it is organising the production, consumption, processing and recovering of its biological feedstocks. The bioeconomy has been proposed as a key element of a smart and green development path. Advancements in bioeconomy research and innovation uptake will facilitate the improved management of biological resources and the opening and development of diverse food and bio-based markets.

Bioeconomy has been defined in the European Commission's COM(2012)60 as:

“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”¹

There are many possible reasons for a country to engage in the Bioeconomy. Driving forces for Bioeconomy policy may be merely political – to realise policy existing or newly defined objectives, economic – to stimulate existing economic performance, and/or to generate new market power, as well as oriented towards realisation of environmental objectives – for example, to reduce waste, or Greenhouse Gas emissions, and help improve environmental quality.

Bioeconomy is the field where all types of biomass uses are coming together and links to all biomass uses may be found (Figure 1.1). The actual link between different sectors in practice is, however, relatively small. In the connecting field, competition may occur between biomass generating sectors – which, in principle, may be mutually replacing each other – and biomass converting sectors – which may compete for available feedstocks.

¹ Source: Commission Staff Working Document of COM(2012) 60 final. Innovation for Sustainable Growth. A Bioeconomy for Europe.

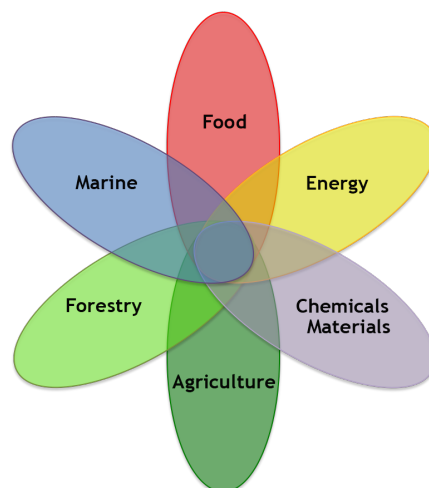


Figure 1.1. Fields covered in the Bioeconomy
Source: European Commission (2014)²

All Bioeconomy areas already have their own strategy, actions and innovation. Focussed action in research and policy is needed to use them to address major basic challenges that are prevalent in the current research and policy agenda's. By using a cross-sectoral approach, bioeconomy areas can be linked in an effective way to develop new, innovative research areas, and enhance policy coherence. The development of a good connectivity between individual areas is a prerequisite for effective bioeconomy development.

Establishing a bioeconomy can boost economic growth and jobs in rural, coastal and industrial areas, reduce fossil fuel dependence and improve the economic and environmental sustainability of primary production and processing.

The Bioeconomy Strategy and Action Plan presented in a 2012 Communication on Bioeconomy aims to facilitate the development of an innovative, resource efficient, sustainable and competitive use of biological resources, reconciling their exploitation for industrial purposes with food security while providing sufficient environmental safeguards. Under Action N° 6 of the Bioeconomy Action Plan consists in establishing a Bioeconomy Observatory.

The establishment of the Observatory is part of the implementation of the EU Bioeconomy Strategy and Action Plan laid down in the European Commission Communication on Bioeconomy of February 2012 (COM(2012)60)³. Objective of the action plan is to emphasise the importance of the bioeconomy for Europe in addressing major societal and economic challenges and to create a more favourable environment for its realisation.

The Bioeconomy Observatory, as the Strategy does, focuses on three main pillars (Figure 1.2):

- "Research" (investments in Research, Innovation and Skills)
- "Policy" (reinforced policy interaction and stakeholder engagement)

² European Commission (2014). Where next for the European Bioeconomy? Brussels, Directorate-General for Research and Innovation

http://ec.europa.eu/research/bioeconomy/pdf/where-next-for-european-bioeconomy-report-0809102014_en.pdf

³ Commission Staff Working Document of COM(2012) 60 final. Innovation for Sustainable Growth. A Bioeconomy for Europe.

- "Markets" (enhancement of markets and competitiveness in bioeconomy)

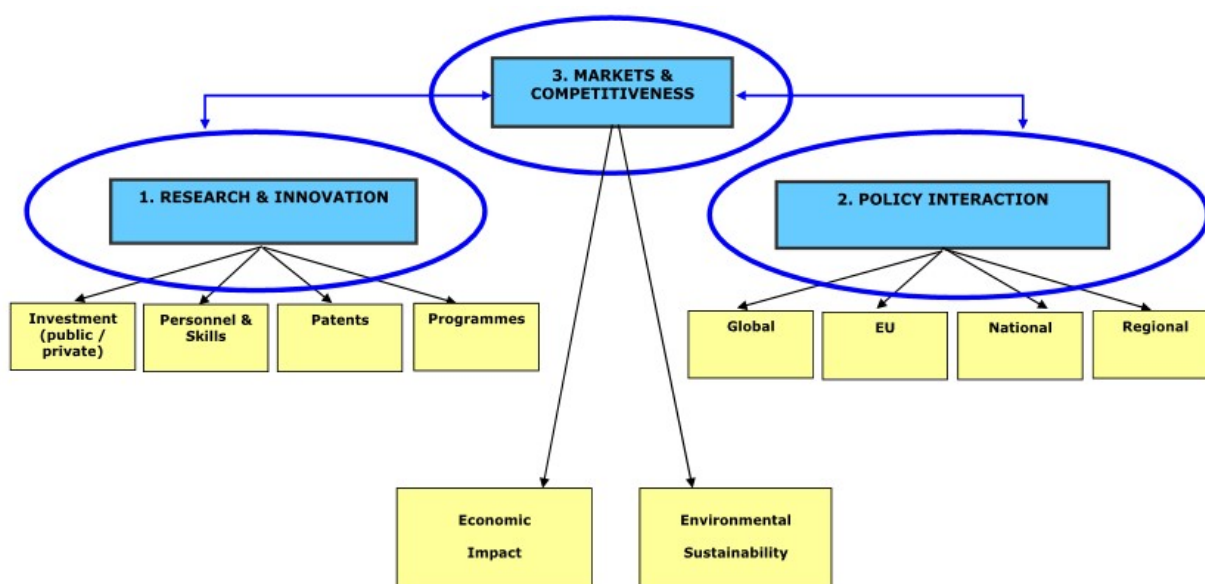


Figure 1.2 Three pillars of the Bioeconomy Information System Observatory (BISO) project⁴

The Joint Research Centre (JRC) is in charge of setting up the Bioeconomy Observatory, in close collaboration with existing information systems that allows the Commission to regularly assess the progress and impact of the bioeconomy and develop forward-looking and modelling tools. The project time line goes from the first quarter of 2013 until the first quarter of 2016; the project acronym is BISO (Bioeconomy Information System Observatory).

The establishment of the Bioeconomy Observatory is expected to support one of the major objectives of the EU Bioeconomy Strategy, which is "to contribute to achieve the full potential of the bioeconomy, by providing the knowledge base for a coherent policy framework and promoting relevant innovation activities, thereby giving specific support to markets and policies related to the bioeconomy".

Data collection and data analysis from the Bioeconomy Observatory will provide a solid basis for decision-making on the bioeconomy, in particular for policy-makers. The primary target audience for the Bioeconomy Observatory will be policy-makers (be it at EU or at national Member States level), who will be provided with comprehensive and authoritative data and information on bioeconomy.

Data and information collected about bioeconomy research, policy and markets will be available online through the BISO website. More specifically, key bioeconomy data and information collected at national level are summarised in a series of "national bioeconomy country profiles" for the EU-28 Member States which can be downloaded from the website (<https://biobs.jrc.ec.europa.eu/policy>).

⁴ Source: Plan, D. (2013). The EU Bioeconomy Observatory. First stakeholders roundtable. 26th November 2013. Brussels. <https://ec.europa.eu/jrc/sites/default/files/events/20131126-biso-roundtable/20131126-biso-roundtable-plan.pdf>

In this way, Member States authorities are provided with comprehensive and authoritative data and information on bioeconomy. They are also key partners for the Observatory in terms of "supply" of national bioeconomy data and information to the Bioeconomy Observatory. In order to access, collect and confirm the accuracy of bioeconomy data and information gathered at national level, partnership between the Bioeconomy Observatory and the Member States remains crucial.

Partnership between the Bioeconomy Observatory and the Member States has been established through bilateral interaction with individual Member States authorities and through cooperation with the Standing Committee on Agricultural Research (SCAR) and in particular its Strategic Working Group on Sustainable use of Bio-resources for a Growing Bioeconomy (SBGB).

The Standing Committee on Agricultural Research (SCAR) of the European Union was established in 1974 by a Regulation of the Council of the EU. It is formed by representatives of Member States, and presided over by a representative of the Commission, who has a mandate to advise the Commission and the Member States on the coordination of agricultural research in Europe. It was given a renewed mandate in 2005 to play a major role in the coordination of agricultural research efforts across the European Research Area.

The Membership is composed by the 28 EU Member States, as well as representatives from Candidate and Associated Countries as observers. The SCAR members currently represent 37 countries. Since 2005, more than 20 working groups have been set up by European countries engaging voluntarily and on a variable-geometry basis in the definition, development and implementation of common research agendas based on a common vision of how to address major challenges in the field of agricultural research.⁵ In 2013, SCAR and DG-JRC decided to join forces in the development of a survey to collect essential data on national Bioeconomy policies, legal status of Bioeconomy development and national as well as regional/cluster R&D initiatives and public R&D funding. Together, DG-JRC and SCAR could provide a broad link to existing policies as well as R&D practices in the field of both classical and emerging Bioeconomy sectorial developments.

The common "Bioeconomy Member States survey" was run in 2014 aiming to collect information on the bioeconomy at individual national Member State level, with a particular focus on national research activities and policy initiatives for the bioeconomy. Biomass Research has provided support in the implementation and analysis of the survey. The general objective was to collect at individual Member State level and (on the basis of a preliminary questionnaire prepared by the JRC and SCAR) quantitative data and qualitative information on bioeconomy. In the survey, there was a particular focus on national bioeconomy research activities and national bioeconomy policy initiatives.

Biomass Research collaborated with DG JRC and SCAR, in particular with its Strategic Working Group on Sustainable use of Bio-resources for a Growing Bioeconomy (SBGB). Data and information were collected through "national survey contact points" who received a questionnaire. This report presents the main results of the survey, as they have been incorporated to national files presented on the Bioeconomy Observatory website. It contains the following elements: the questionnaire is introduced in Chapter 2; main results of the survey are presented in Chapter 3, which is followed by a discussion (Chapter 4). The annex lists details of the survey received from France. The full report, presenting results for more than 20 countries, is available online⁶.

⁵ http://ec.europa.eu/research/agriculture/scar/groups_en.htm

⁶ See <https://www.scar-swg-sbgb.eu/documents>

2. METHODOLOGY AND QUESTIONNAIRE

A questionnaire was developed including six questions and several sub-questions, organised in two sections. In the first section, questions were oriented towards existence and character of national Bioeconomy policies. The second section focused on national Research and Development.

An overview of the questions is presented in Table 2.1. Many questions were open or offering plenty room for explanation and additional descriptions. Priority rankings were asked related to the main drivers to engage in the Bioeconomy (Question 2) and to the perceived benefits of research cooperation initiatives in the EU (Question 6). National policies, existing Bioeconomy regions and clusters and R&D projects could be listed. Question 4 requested annual public funding budgets for different types of Bioeconomy related research.

Table 2.1 Overview of questions of the JRC-SCAR Bioeconomy survey

Question	Subject	Type
1	Definition of Bioeconomy implemented in national policy documents. Comparison to definition used by the European Commission	Open
2	Main drivers to engage in the Bioeconomy	Priority ranking
3a	National policy strategies covering Bioeconomy	Yes/no + explanation
3b	Identification of national Bioeconomy policies	Yes/no + description, links
3c	Bioeconomy regions and clusters	Listing
4	Bioeconomy R&D programmes	Listing + explanation, public budget
5	Bioeconomy research and innovation projects	Listing + description
6	Benefit of European research cooperation	Ranking + listing existing programmes

An overview of the questionnaire is presented in Annexe 1.

The survey and a first draft of the questionnaire were presented to members of the SCAR Strategic Working group on Sustainable Bioresources for a Growing Bioeconomy, during its meeting in the Hague on June 13, 2014. Feedback on the preliminary setup was received and elaborated in the process of the finalisation of the questionnaire.

The final questionnaire was sent out to national SCAR contact points together with a personal introduction letter on June 20. The intended first deadline was August, 15. This deadline was later extended to September, 1, 2014. An overview of the contact points involved in the survey is presented in Annex 2.

Submissions were received from Belgium, Switzerland, Czech Republic, Germany, Denmark, Estonia, Spain, Finland, France, Hungary, Ireland, Israel, Italy, Latvia, the Netherlands, Norway, Sweden, Slovenia, Turkey and the United Kingdom. Belgium submitted two questionnaires, one for each major region. Italy used the framework for an old questionnaire. The questionnaire by Latvia was received late.

3. RESULTS

Survey participation

A total of 21 countries responded to the survey (Figure 3.1). Of them, 20 submitted a questionnaire, 17 Member States (Belgium, Czech Republic, Germany, Denmark, Estonia, Spain, Finland, France, Hungary, Ireland, Italy, Latvia, the Netherlands, Sweden, Slovenia, and the United Kingdom), and four non-Member States (Switzerland, Israel, Norway, and Turkey). One country (Slovak Republic) announced that submission was intended. Belgium submitted two questionnaires, one for Flanders and one for Wallonia.

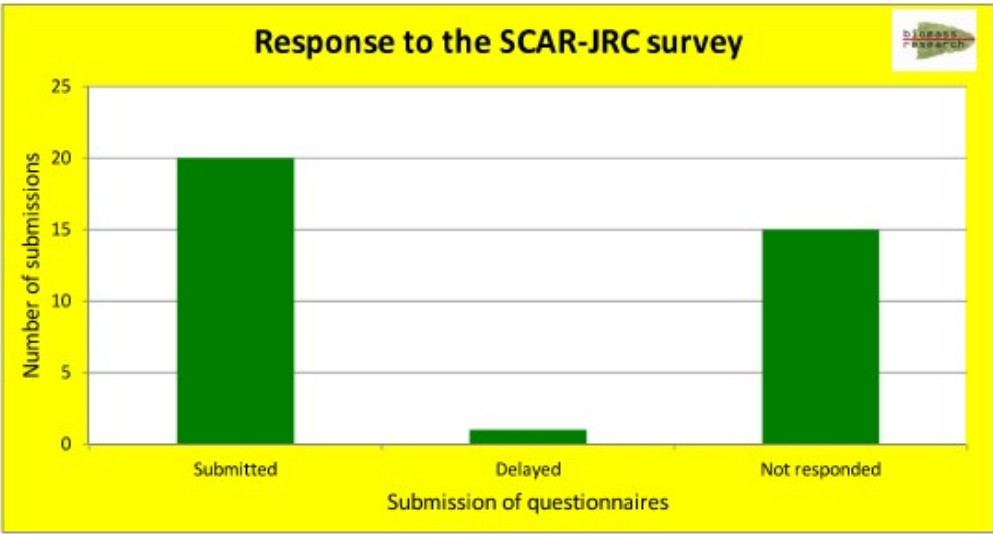


Figure 3.1 Questionnaire submission

Not all questionnaires were complete. Italy used an old format, and did not provide answers to all questions. Other countries missed questions as well (Figure 3.2).

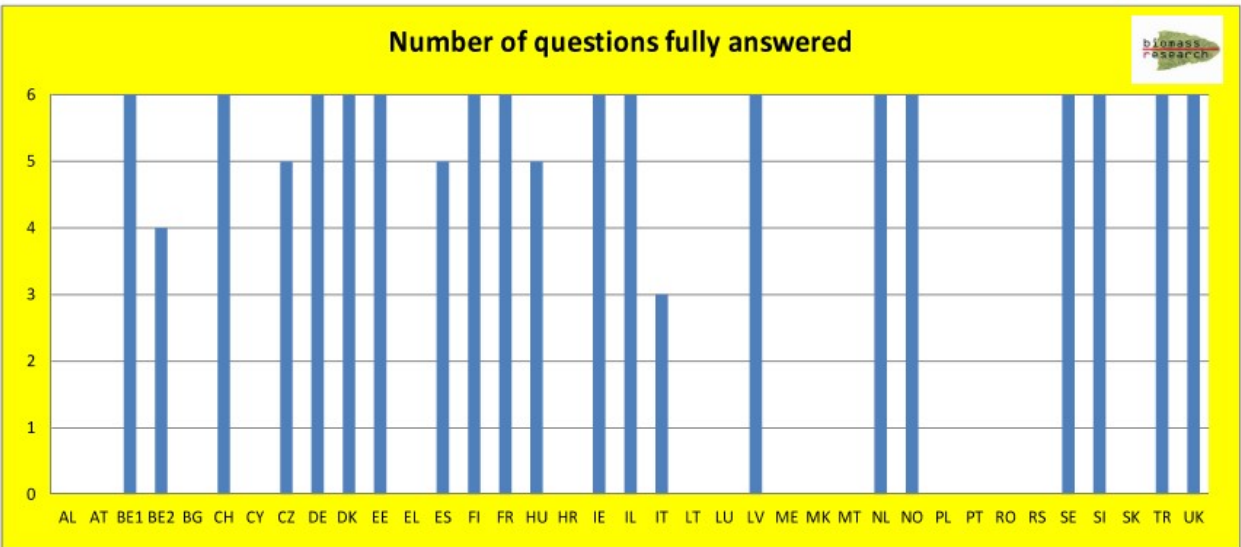


Figure 3.2 Number of questions that were fully answered

Question 1: Bioeconomy policy and definition

Twelve countries (60%) use a definition for the Bioeconomy that is more or less similar to the definition used by the European Commission (Figure 3.3). Among Member States that submitted the questionnaire, ten (63%) have a similar definition to the one used by the Commission. Most of the other countries do not use a definition.

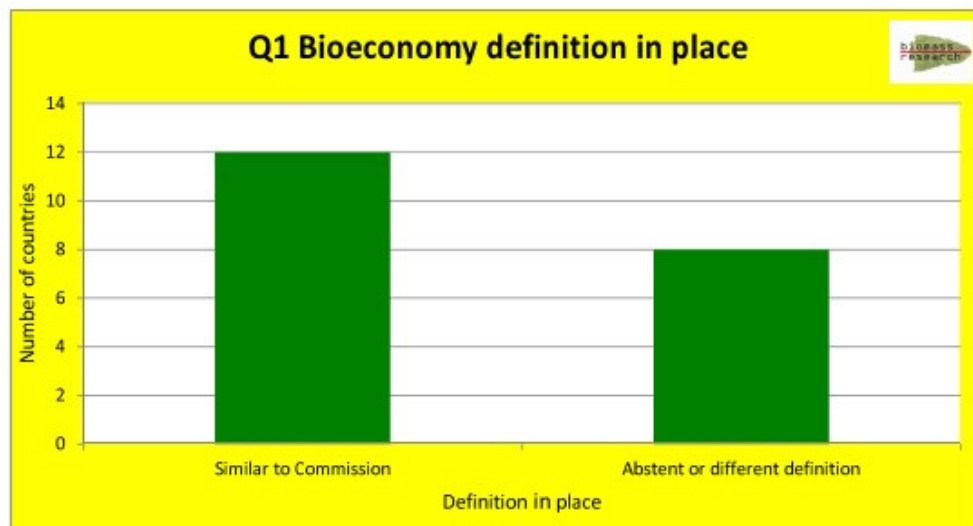


Figure 3.3 Bioeconomy definition resemblance with the Commission's definition

Question 2: Drivers to implement a Bioeconomy policy

Reasons to implement Bioeconomy policy are related to factors with a merely political, economic, or environmental character. The average ranking of 20 submissions shows priority of individual drivers ranges between 3.0 and 4.5. Economic drivers are given a higher average score (4.3) than political (average score 3.7) and environmental objectives (average 3.5). Hence, the development of a Bioeconomy policy is seen as an opportunity to enhance economic development, including both classic and new Bioeconomy sectors, while food security and the need to combat climate change are also relevant (Figure 3.4).

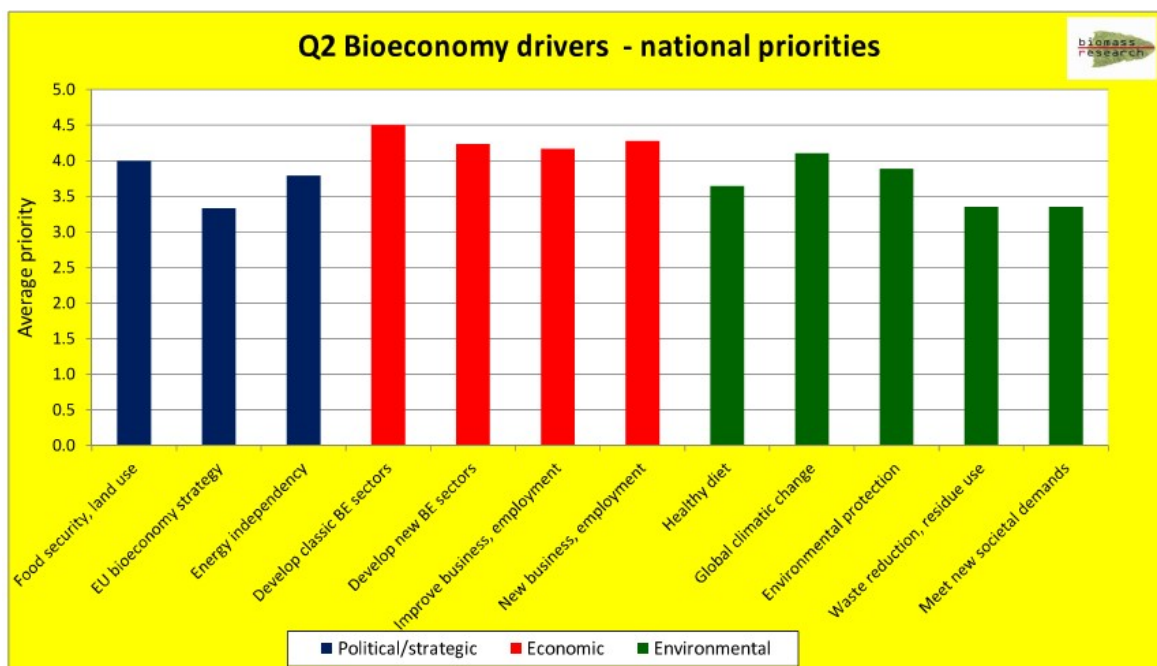


Figure 3.4 Drivers to develop a Bioeconomy strategy

Question 3: National policy strategies

Nine countries are implementing a Bioeconomy strategy (Figure 3.5). Flanders, Germany, Finland and Sweden have developed a full strategy; Switzerland, Denmark, Estonia, the Netherlands and Wallonia implement a partial strategy.

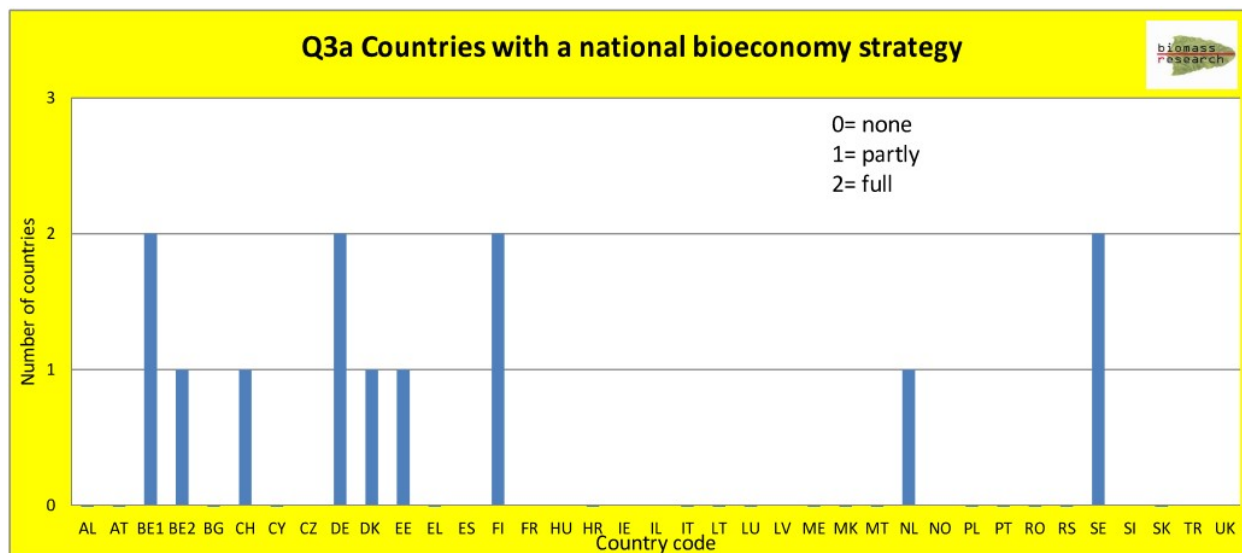


Figure 3.5 Countries with a Bioeconomy strategy

Five countries (Germany, Estonia, Finland, Hungary and the Netherlands) have installed a national Bioeconomy Agency. In most cases, two ministries are (jointly) in charge of the implementation of the Bioeconomy strategy (Figure 3.6).

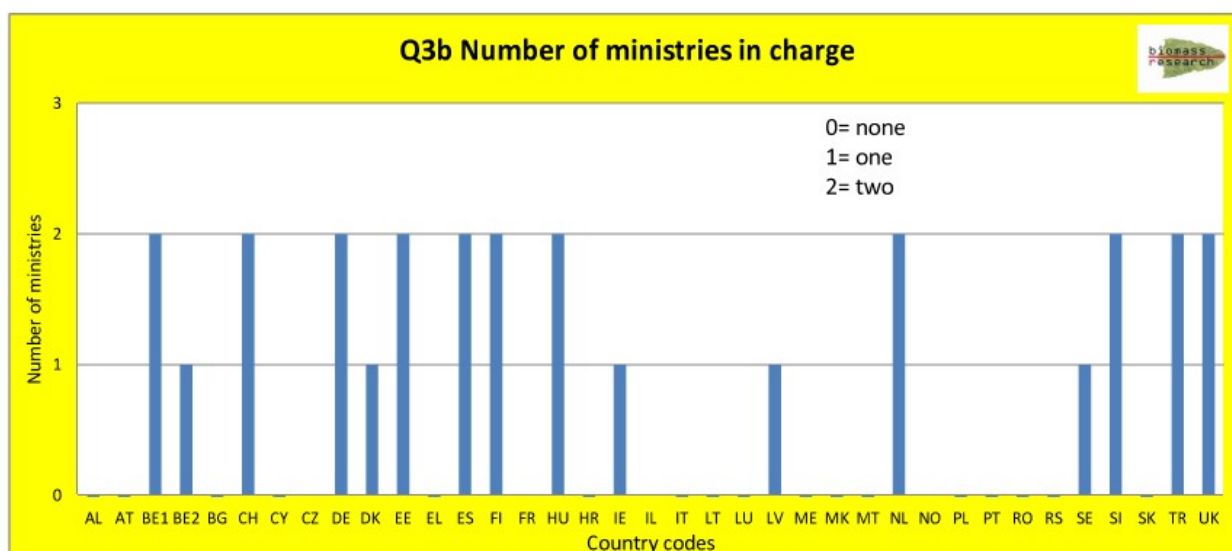


Figure 3.6 Number of ministries in charge of the Bioeconomy strategy

Question 4: Bioeconomy related R&D programmes

The budget for R & D programmes in the bioeconomy receives some 2.3 billion of public funds⁷. This amount is based on the questionnaires that were submitted and cannot be considered as fully representative for countries that did not submit any details on their information. Details of the funding of bioeconomy research & development programmes are presented in Table 3.1. Agriculture is the sector receiving most of the R & D funding. It annually receives 1.3 billion Euro which is more than half of all reported public funding. Industrial use of biomass receives 185 million Euro's (8%); while 185 million Euro is allocated to energy use; marine, fisheries and aquaculture receive 172 million Euro's (7%). A relatively small amount is designated to generic bioeconomy programs (6%).

Table 3.1 Bioeconomy related national research budgets

Sector / activity	Budget ¹	Share of total budget ²
<i>Generic Bioeconomy ^a</i>	136	5.8%
<i>Agriculture</i>	1,344	57.5%
<i>Forestry</i>	10	0.4%
<i>Marine, fisheries, aquaculture</i>	172	7.4%
<i>Waste as biomass sources</i>	58	2.5%
<i>Food and feed use of biomass (food/feed value chains)</i>	27	1.2%
<i>Energy use of biomass (bioenergy)</i>	185	7.9%
<i>Industrial uses of biomass ^b</i>	196	8.4%
<i>Key enabling technology (industrial biotechnology)</i>	54	2.3%
<i>Communication, stakeholder involvement</i>	0	0.0%
<i>Other (please specify)</i>	155	6.6%
<i>All</i>	2,338	100.0%

^a Covering several elements and sectors of the bioeconomy; ^b Including paper and pulp, wood and wood products, chemical production, pharmaceutical production, and other industrial uses.

⁷ Only funds from research programmes, no budgets from structural or innovation funds were reported.

Question 5: Case-studies of Bioeconomy related research and innovation projects

More than 100 case-studies of successful Bioeconomy development have been reported. Nearly half of them were listed by Germany. Large numbers of case-studies were also reported by Flanders, Germany, Denmark and the UK. An overview of the number of case studies reported is given in Figure 3.7.

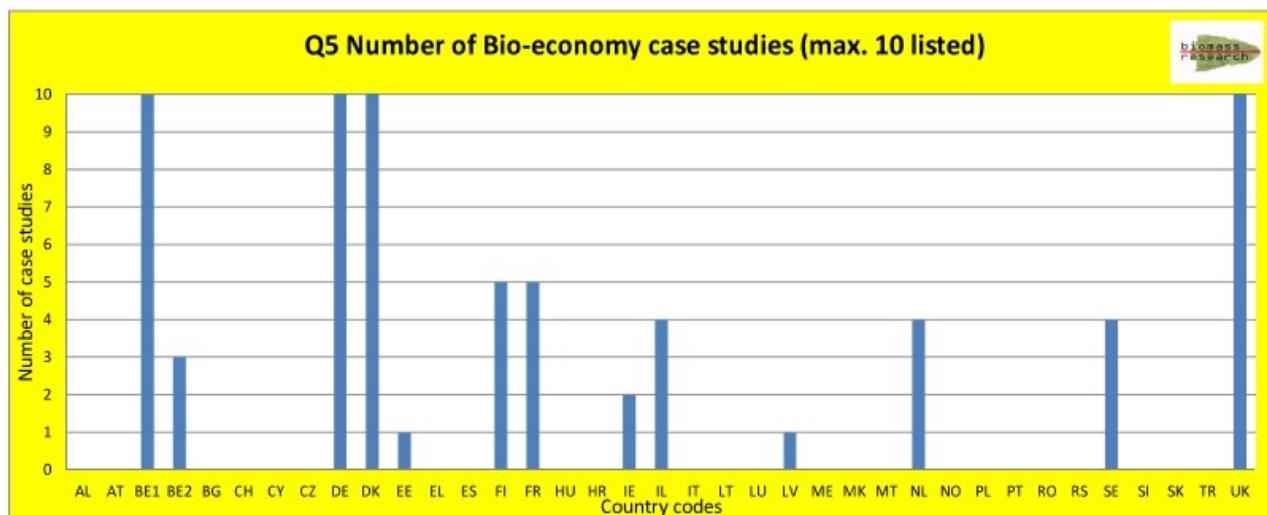


Figure 3.7 Number of case studies reported⁸

Question 6: Bioeconomy transnational R&D collaboration

The participating countries see large (potential) benefits of participation in international R&D programmes related to the Bioeconomy, although in many cases countries find it difficult to assess priority. Table 3.2 presents an overview of rankings allocated to individual elements. The lowest ranking (1) was not given. Most frequent were the highest rankings (4 and 5).

Table 3.2 Rankings reported on perceived benefits of transnational R & D collaboration

Sector / activity	Ranking	1	2	3	4	5	All
<i>Food security</i>		0	1	0	6	6	13
<i>Policy framework</i>		0	0	2	5	3	10
<i>Bioenergy</i>		0	0	5	2	4	11
<i>Social inclusion</i>		0	0	4	2	2	8
<i>Economic, market framework</i>		0	0	3	3	5	11
<i>Knowledge, practices transfer</i>		0	0	1	8	4	13
<i>Resource efficiency</i>		0	0	2	5	5	12
<i>Biorefineries</i>		0	1	2	4	4	10
<i>Algae</i>		0	1	2	2	1	11
<i>Animal feed</i>		0	1	4	5	0	6
<i>Healthy food research</i>		0	1	1	5	5	12
<i>Sustainability criteria</i>		0	0	1	3	9	13
<i>Genetics</i>		0	1	2	5	4	12
<i>Renewable resources</i>		0	1	3	3	4	11
<i>Footprint methodology</i>		0	1	1	3	3	8
<i>All</i>		0	8	33	63	61	4

⁸ For the sake of conciseness, a maximum of ten case are presented studies per country

Average ranking scores per element were high, ranging between 3.5 and 4.6. Highest scores were given to research on the development of sustainability criteria, and to research on biorefineries, food security, resource efficiency and knowledge transfer (Figure 3.8). Average scores for political/strategic and economic elements were similar (4.1). Scores for environmental elements were slightly higher (4.2).

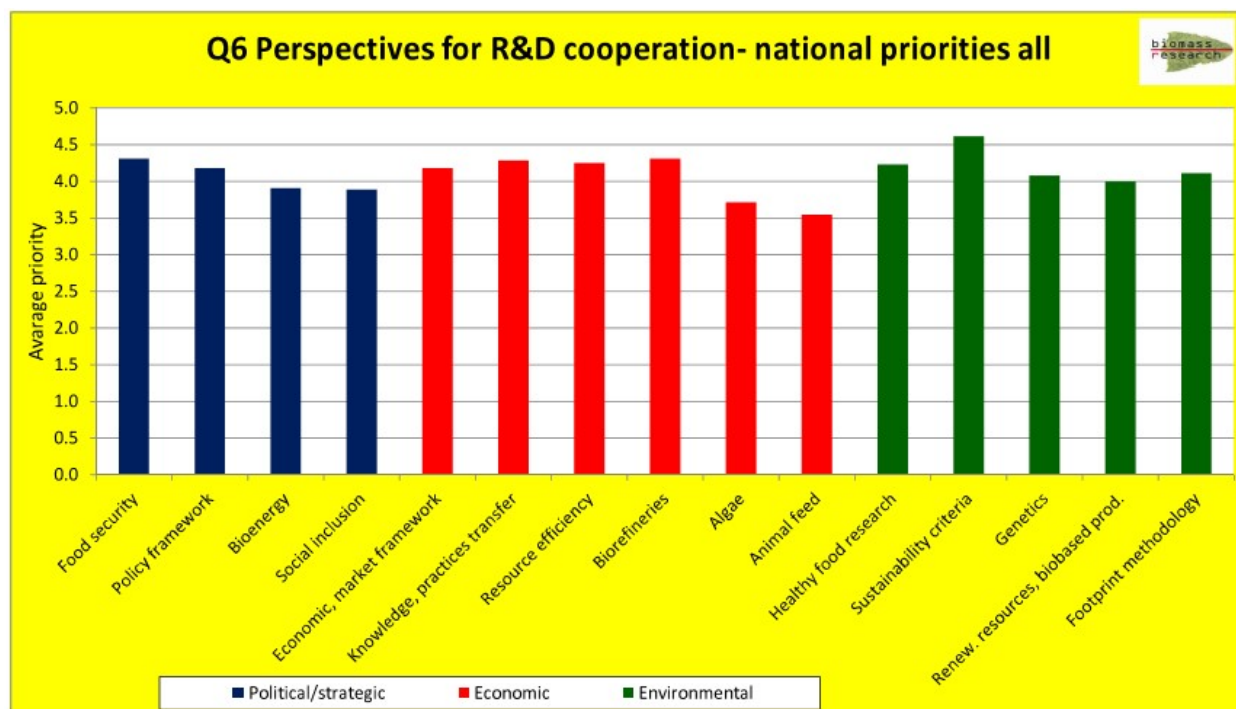


Figure 3.8 Perspective for international cooperation (all submissions)

A comparison between scores of Member States and non-Member States shows few differences. Member States generally give higher rankings, which suggests higher expectations of international cooperation. Environmental elements are given the highest ranking (Figure 3.9).

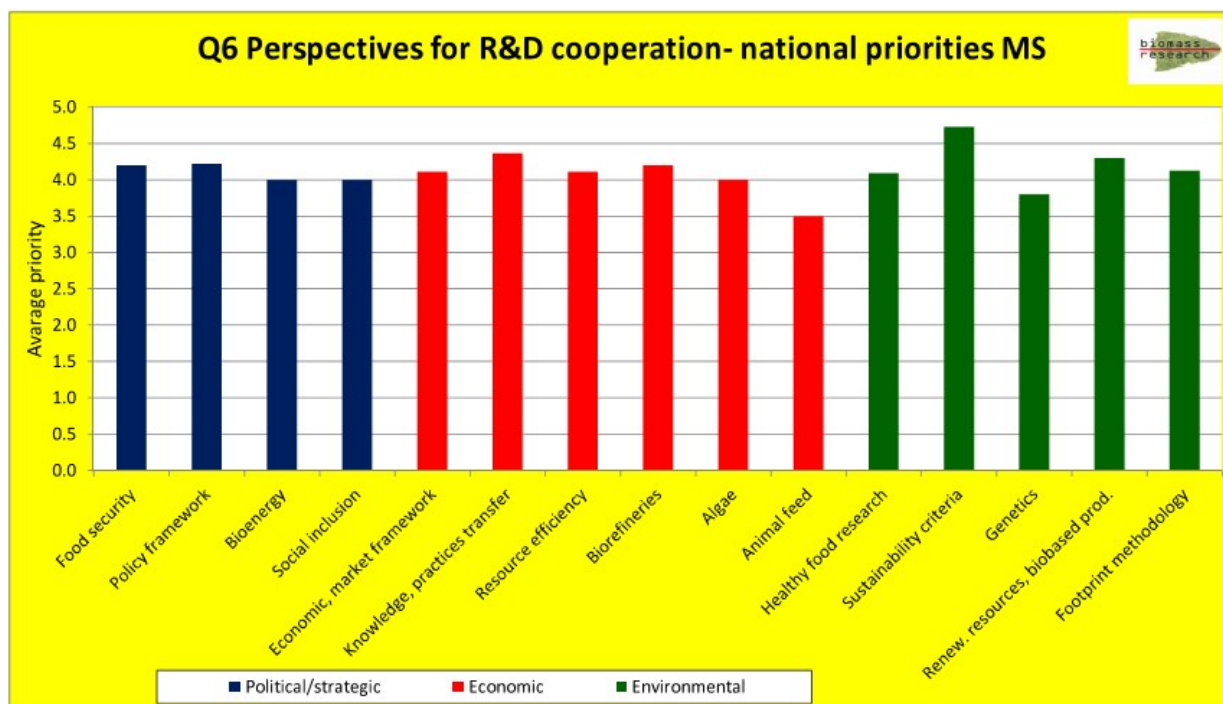


Figure 3.9 Perspective for international cooperation (Member States only)

4. DISCUSSION AND CONCLUSION

Following an active policy towards the development of a strong and effective Bioeconomy in the EU, the European Commission is working towards the establishment of a Bioeconomy Observatory. The development of the BISO project is supported by a "Bioeconomy Member States survey" to collect information on the bioeconomy at individual Member State level national, with a particular focus on national research activities and policy initiatives for the bioeconomy. A SCAR (Standing Committee on Agricultural Research) member list has been used to identify national contact points in 28 European nations including all EU Member States.

Each of the contact points was approached, requesting collaboration in the distribution and/or filling of the questionnaire in their home country. In most cases, the questionnaire was redirected to the responsible ministries as requested. Sometimes, a new contact point had to be approached. General response to the request was positive, with more than half of the countries submitting a questionnaire within the requested period which included the summer period of 2014.

The response was higher than previously was anticipated, which suggests that the right forum has been used to address issues of Bioeconomy Observatory. Twenty countries have submitted a questionnaire; Belgium submitted two (one for each major region). The quality of the submitted questionnaires was high, often providing a lot of details related to policy, R&D and regional initiatives.

This does not mean that all countries have provided similar quality of answers. As a rule, countries already active in the development of a Bioeconomy policy and research framework (e.g. Germany, Denmark, Finland, Belgium, and The Netherlands) made a larger effort in preparing the answers to the survey. While, further, the response rate has been above expectations, it is recommended to approach countries that did not (yet) submit directly as the SCAR list of contact points is not likely to be the best opportunity to obtain the missing questionnaires.

Large differences exist with respect to the implementation of a Bioeconomy policy. A limited number of countries installed such a policy, a bioeconomy advisory board or an implementation agency. In some other cases, one or two ministries have been assigned the lead in the development of a Bioeconomy policy. Generally, a small number of countries seem to implement a full package (strategy, board, agency, policies, and dedicated R&D programmes).

There is, however, room for optimism. While Bioeconomy oriented policies and R&D infrastructure are developing, both at the national and the EU level many initiatives are taken. There is a substantial budget for Bioeconomy related research, with annual expenses exceeding 2.3 billion Euro.

A large number (108) of regional/cluster or national initiatives has been listed in the survey, and more may be expected. The recent publication of National Bioeconomy Profiles in the Bioeconomy Observatory (<https://biobs.jrc.ec.europa.eu/>), combining data from national and EU statistical bureau's with industrial key figures and data generated by the survey, is another milestone.

How, then, to evaluate these figures? We compare results presented above to a list of enabling factors for the development of new biotechnological innovations as presented by the Pugatch Consili-

um (2014)⁹. Enabling factors for innovative technological development include:

1. **Human capital** – A basic and fundamental building block is the availability of high skilled and technically trained human capital.
2. **Infrastructure for R&D** – R&D capacity is critical to fostering innovation and activity in high tech sectors including biotechnology and is reflected by country-level indicators including total R&D expenditure; patenting intensity; life science investment levels; public-private partnerships; and academic and scientific citations.
3. **Intellectual property protection** – Intellectual property rights such as patents and regulatory data protection are historically of real importance to the biotech and biopharmaceutical innovation process as they incentivise and support the research and development of new biological technologies and products.
4. **Regulatory environment** – The regulatory and clinical environment in a given country plays a significant role in shaping incentives for innovation and establishing adequate levels of quality and safety for biotech products, particularly biopharmaceuticals.
5. **Technology transfer frameworks** – Technology transfer is an important mechanism for the commercialisation and transfer of research from public and governmental bodies allowing private entities to develop commercially applicable technologies.
6. **Market and commercial incentives** – Market and commercial incentives can be realised *via* different formats including as tax incentives, support for basic research and R&D credits for investments in plant, equipment and other R&D infrastructure.
7. **Legal certainty** (including the rule of law) – The general legal environment as it relates to the rule of law including legal business context is crucial to commercialization and business activities.

Five of the enabling factors are addressed by the survey: human capital, R&D infrastructure, the regulatory environment, technology transfers, and legal certainty. Market incentives are not addressed directly, but it may be expected that emphasis on a proper legal framework and – especially – budgets for Research & Development, as well as international cooperation in R&D, help to develop an environment where economic conditions for commercial development is favourable. The survey provides a good coverage of the factors that need to be addressed in the Bioeconomy.

The recommendations presented by Pugatch with respect to technology development are in line with results of other studies. Compare, for example, to a listing by the Milken Institute (2013)¹⁰.

According to this study, prerequisites for bioeconomy development in the USA include:

- Consistent government policies
- 'Green banks'
- Public, private procurement programs
- Level regulatory playing field

⁹ Pugatch (2014). The bioeconomy. http://www.pugatch-consilium.com/reports/Building_The_Bioeconomy_PugatchConsiliumApril%202014DD.pdf. Accessed 12 June 2014

¹⁰ Milken Institute (2013). Financial Innovations Lab Report. Unleashing the power of the Bio-Economy.

- Use agricultural, rural development programs
- CAP, Cohesian funds
- Use existing infrastructure

The list provided by Pugatch is also in line findings of other theoretical frameworks like the *Functions of Innovation Systems Theory*¹¹, that was developed for analysing the implementation of innovations in the Netherlands. As a rule, succesful innovations require a combination of availability of robust technology development, knowledge diffusion, entrepreneurship, availability of credit, market development and political frameworks (Langeveld 2010¹²).

Not all elements are equally well covered in the JRC-SCAR survey or – more in general – the Bioeconomy Observatory. Basically, these focus on the identification of the Bioeconomy as a strategic development area, the stimulation of national Bioeconomy strategies, the measurement and evaluation of performance including the identification of best practices, the leverage of national capabilities and enhancement of international cooperation.

¹¹ Hekkert, M., Negro, S., Heimeriks, G. and Harmsen, R. (2011). Technological Innovation Systems Analysis. A manual for analysts. Utrecht, Copernicus Institute for Sustainable Development and Innovation.

¹² Langeveld, J.W.A., Kalf, R. and Elbersen, H.W. (2010) Bioenergy production chain development in the Netherlands: key factors for success. *Biofuels, Bioprod. Bioref.* 4:484–493. DOI: 10.1002/bbb.240

ANNEXE



EUROPEAN COMMISSION
JOINT RESEARCH CENTRE

SCAR
Standing Committee
on Agricultural Research

Strategic Working Group on Biomass

FR - FRANCE

Joint Survey on National Bioeconomy Strategies

Country: FRANCE

Year of data collection: 2014

Contact mail person in charge of data collection: cyril.kao@agriculture.gouv.fr

This survey consist of two parts. It is aimed to collect data on:

1. National Bioeconomy Policies and
2. National Bioeconomy Research & Development

I POLICY

Q 1: Does your country have a national definition for Bioeconomy? If so, please provide definition here

No official definition available yet.

Please describe where your country's definition is different from the EU definition of the bioeconomy.¹³

¹³ 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' *Source: Commission Staff Working Document of COM(2012) 60 final. Innovation for Sustainable Growth. A Bioeconomy for Europe.*

	Please insert priority ranging from 5 (= high) to 1 (= low)	Comment/specification
Contribution/implementation of the EU strategy on Bioeconomy		
Food security/ land-use competition		
Healthy diet		
Independence from fossil resources/security of supply		
Development of classic bioeconomy sectors (agriculture, forestry, fisheries, food, paper)		
Development of new bioeconomy sectors (bioenergy, industrial biobased products)		
Maintaining business base and employment		
New business, increased employment		
Mitigation of climate change/adaptation to climate change		
Environmental protection/ environmental sustainability (i.e. biodiversity and ecological services)		
Resource efficient economy (reduction of waste, use of residues)		
Societal demand		
Other drivers – please specify	Ongoing reflection in France	

Does your country have a National Bioeconomy strategy ?	No	Name of the strategy: Link:
Ministry(ies) in charge of the Bioeconomy strategy ?	Yes / No	Name of the responsible Ministry/ Ministries: Link:
Does your country have a Bioeconomy advisory body/panel ?	No	Name of the body: Link:
Does your country have a Bioeconomy agency or agencies ?	No	Name of the agency: Link:
Does your country have a Bioeconomy observatory collecting data/info ?	Yes (partly)	Name of the body: National Observatory of Biomass Resources Link:
Does your country have a Bioeconomy National Contact point ?	No	Name: Contact:

Bioeconomy related policies	Is a policy initiative for this area/sector available?	If yes, please elaborate on how the Bioeconomy is covered in this policy initiative	Link for download ¹⁴
Agriculture	Yes	Agroecological project for France (2012), Legislation for the Future of Agriculture, Food and Forestry (2014)	
Forestry	Yes	Action plan for wood processing industries (2013), Wood industries plan (2014)	
Marine/Fisheries/Aquaculture	Yes / No		
Waste	Yes	Waste plan (2009-2012), Energy, methanisation and nitrogenous autonomy plan (2012)	
Agri-Food & Food security	Yes	National Food Plan (2010), Action plan against the rising price of grains (2012), National plan against food waste (2012)	
Food, Healthy diet	Yes	National Programme Nutrition and Health (2001), National Food Programme (2010)	
Research & Innovation	Yes	Programme "Investments for the Future" (2010), National Research Strategy (2014)	
Green Growth Strategy	Yes	Strategic industrial sectors of green economy (2010), Roadmap for the ecological transition (2012)	
Blue Growth Strategy	Yes / No		
Energy, including Bioenergy	Yes	Biofuels Plan (2004), Plan for Energetical Efficiency of Farms (2009), National Action Plan for Renewable Energies (2010), Energy, methanisation and nitrogenous autonomy plan (2012), Programmatic Law for Energy Transition (planned, 2014)	
Industry, Enterprise	Yes	Strategy for Plant Chemistry and Biomaterials (2007), Strategy and action plan for the use of biobased materials in construction, 34 Industrial plans for sectors of the future (2013): especially The industrial plan « green chemistry and biofuels», World competition for innovation 2030 (2013): plant proteins, vegetal-based chemistry	
Environment (incl. resource efficiency, sustainability, water use)	Yes	Grenelle Environnement (2007), Biodiversity Legislation (planned, 2014)	
Eco-System Services	Yes	Grenelle Environnement (2007)	
Regional development and Smart Specialisation	Yes	Competitiveness clusters policy (2004)	

¹⁴ Please provide English link (if available)

Education/Skills	Yes	Teach to produce otherwise (2014)	
Other areas, please specify			



Please list Bioeconomy regions and/or clusters in your country (if available)

Name	Description of the focus/specialisation ¹⁵	Link ¹⁶
Agri Sud-Ouest innovation	1, 2 – Agri-chains	http://www.agrisudouest.com/en/
Aquimer	1, 2 – Aquatic products	http://www.poleaquimer.com/en/index.html
Capenergies	3 – Energy generation with no greenhouse gases	http://www.capenergies.fr/fichiers/anglais/gbv5.pdf
Céréales Vallée	1, 2, 4 – Cereal Production, Food, Feed, and agromaterials from cereals	http://cereales-vallee.org/default_gb.cfm
Dream Eau et milieux	3 – Green technology related to water and aquatic environment	http://www.poledream.org/what-s-dream
Industries et Agro-Ressources	2, 3, 4 – Biorefineries, plant-based chemistry, industrial biotechnologies	http://www.iar-pole.com/?lang=en
Nutrition, Santé, Longévité	2 – Innovative research in the fields of cardiovascular and metabolic diseases, age-related neurodegenerative diseases and nutrition	http://www.pole-nsi.org/index.php
PASS	4 – Aroma, scents, flavors	
Pôle Fibres	4 – Wood and fiber materials	
Qualiméditerranée	1, 2 – Euro-mediterranean agriculture and food	http://www.qualimediterranee.fr/home.html
Qualitropic	1, 2 – Tropical bioeconomy	http://www.qualitropic.fr/uk/
Tenerrdis	3 – Energy, including wood energy, biogas, pretreatment and conversion processes	http://www.tenerrdis.com/
Terralia	1, 2 – Agro-food : fruits, vegetables, wine, cereals	http://www.pole-terralia.com/en/
Trimatec	3 – Industrial clean and sober processes, including algae biomass	
Valorial	2 – Food for the future	http://www.pole-valorial.fr/spip.php?lang=en
Vegepolys	1 – Sustainable plant	http://www.vegepolys.eu/en/
Vitagora	2 – Taste, Nutrition, Health	http://www.vitagora.com/en
Xylofutur	1, 4 – Forest, wood, paper	

¹⁵ 1= biomass supply; 2= food/feed use of biomass; 3= energy use of biomass/bioenergy ; 4= industrial use of biomass, biobased products

¹⁶ Please provide English link (if available)

II Research & Development

Q 4: Which Bioeconomy related R&D programmes exist in your country ?

By type of activity	Programme name (please provide links)	Short description and relation with the Bioeconomy	National Public Funding allocated to the programme (€ / year)
Agriculture	PNDAR Investments for the Future ANR Challenge 5	Applied research for agriculture and rural development Crops improvement Food security, Biomass production and Agroecology	70 M€ 1 540 M€ (10 years) Annual Call
Forestry	ANR Challenge 1 and 5	Forest management and biodiversity, tree improvement	Annual Call
Marine/Fisheries/Aquaculture	ANR Challenge 1 and 5	Food security and environmental concerns	Annual Call
Waste as Biomass source	Investments for the Future ANR Challenge 1 Ademe DOSTE	Recycling and recovery of waste Sober resources management Organic waste, soil return, processing, energy	0,9 M€ (2015)
Food/feed use of biomass (food/feed value chains)	ANR Challenge 5	Optimization of food processing and waste reduction	Annual Call
Energy use of biomass (bioenergy)	Investments for the Future ANR Challenge 2 ADEME	Pilots for renewable and C-free energies Clean, safe and efficient energy Plant based chemistry and advanced biofuels	Annual Call
Industrial uses of biomass <ul style="list-style-type: none"> • Paper and pulp production • Wood and products • Chemical production • Pharmaceutical production • Other industrial uses 	Investments for the Future ANR Challenge 3 ADEME, Program BIP ADEME BpiFrance DGCIS	Pilots for green chemistry Industrial renewal Bioresources, industries and Performance Plant based chemistry and advanced biofuels Structuring R&D projects for clusters Unique Interministerial Fund for collaborative projects	Annual Call
Key Enabling Technology (Industrial Biotechnology)	Investments for the Future Ademe ERA-IB	White Biotechnologies Industrial biotechnologies	20 M€ (10 years)
Communication, stakeholder involvement			
Other areas, please specify			

II Research & Development

Q 5: Specific case-studies of Bioeconomy related

Please list specific case-studies /examples (success stories) of Bioeconomy research and innovation projects in your country

- **Cluster IAR** (Industries et Agro-Ressources)

RDI development structures in France especially for biobased chemistry and white biotechnology:

- **The biorefinery of Pomacle-Bazancourt** (Public support for innovation: FEDER (EU), FUI (Fr), local subs): includes a sugar and wheat refinery, an industrial ethanol plant 1G, a demo ethanol plant 2G (FUTUROL project), a demo plant for biobased chemistry: BIODÉMO (ex of development: succinic acid of BioAmber and Biobased isobutene of Global Bioenergies). It includes a teaching and academic research center on biobased chemistry;
 - **The IMPROVE shared innovative platform (PFMI)** with its sights set on becoming European leader in the commercialisation of plant-based protein for food and feed sectors and also in emerging sectors such as biosourced materials and cosmetics.
-

The BIOHUB project (leader: Roquette) is a major success in biobased chemistry. Polysorb, a 100% biobased isosorbide plasticizer has been put up on the market;

Operator ADEME:

The bio butterfly project on biobased butadiene demo plant (Michelin, Anxens, IFP En), ongoing action

The BIOMA project on biobased methacrylic acid demo plant (Global bioenergie, Arkema) ongoing action

The DEINOCHEM project on biobased isoprenoids demo plant (DEINOVE) ongoing action

The EuroBioref project (EU-FP7) on integrated biorefinery design for sustainable biomass processing (french partners: Arkema, Novance, CNRS)

The Biocore project (EU-FP7) on 2G biorefineries (french partners: case study on wheat/barely straw in center region)

The SUPRABIO project (EU FP7) on intensified unit operations that can be integrated into economic and sustainable 2G biorefineries (French partners: Algo sources Technologies sas)

	Is there a benefit of European cooperation? Please insert priority ranging from 5 (= high) to 1 (= low)	Are there any transnational cooperations established between your country and other EU Member States? If yes please specify.	Comment/specification
Common sustainability criteria/ GHG emissions			
Resource efficiency			
Renewable resources/ bio-based products			
Knowledge transfer and good practice and innovation			
Economic/ market framework			
Policy framework			
Healthy food research			
Bioenergy			
Animal feed			
Development of an agreed methodology for environmental footprints			
Biorefineries			
Food security			
Social inclusion			
Algae			
Genetics			
Other areas, please specify	Ongoing reflection in France		

