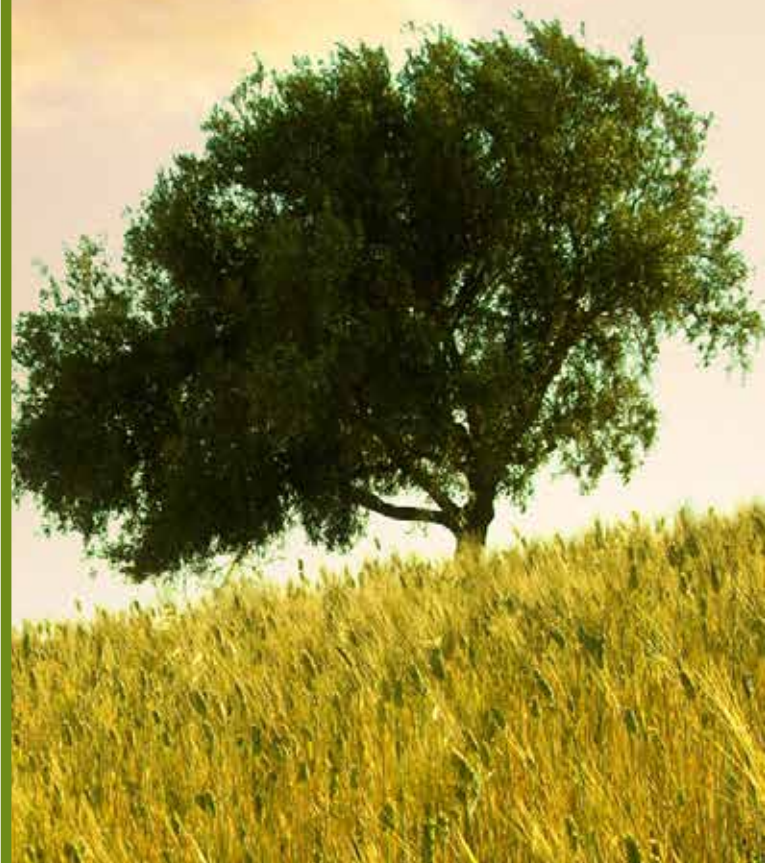




ANNUAL REPORT 2017

Bio-based Industries Consortium

The Bio-based Industries Consortium (BIC) has become an important platform. By bringing companies from diverse sectors under one roof, we were able to “institutionalise” the bioeconomy.





BIO-BASED INDUSTRIES CONSORTIUM

Annual Report 2017

Disclaimer

This document reflects the objectives of the members of the Bio-based Industries Consortium in February 2018. References to figures, budgets, public and private contributions and statistics are those that were official in December 2017. Changes may have occurred since then.

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Regions have an **important** part to play in establishing local **value chains** and can also attract investments in demonstration or flagship projects that will help support **job creation**.

MESSAGE FROM THE EXECUTIVE DIRECTOR

The Bio-based Industries Consortium (BIC) has become an important platform. By bringing companies from diverse sectors under one roof, we were able to “institutionalise” the bioeconomy.

In 2017, we welcomed 21 new Industry Members and 35 new Associate Members. Today we are delighted to have more than 200 companies on board to help us further develop innovative bio-based value chains from diverse feedstocks and contribute to Europe’s circular and low carbon economy objectives.

With the fourth call closed in 2017, the Bio-Based Industries Joint Undertaking (BBI JU) continues to have a strong impact, mobilising relevant stakeholders ranging from SMEs to large companies and resource and technology providers to brand owners, resulting in a significant amount of private investment in European bioeconomy initiatives.

In 2017, we also published the new Strategic Research and Innovation Agenda (SIRA).

To attract additional investments, BIC also released a new overview of financial instruments for large scale bio-based industries investments. The report provides a breakdown of applicable instruments and co-funding opportunities, ranging from debt and equity to quasi-equity financing and grants.

For the first time the European biorefineries have been mapped to make European bio-based activities more visible on the new biorefinery poster.

The role of regions in fostering bio-based technology scale up was the main focus of the General Assembly Open Session. Regions have an important part to play

in establishing local value chains and can also attract investments in demonstration or flagship projects that will help support job creation and provide additional opportunities for the primary sector.

BIC also started a specific programme to identify opportunities for expanding the bio-based industry across Europe, mapping the potential for the bio-based industry, followed by an action plan to assist local actors to step-up bio-based activities.

It is satisfactory to see that the BBI JU is delivering what we hoped for: stimulate deployment, overcome the valley of death, and keep investments in research, innovation, and new processes and production facilities in Europe! However, this will not be completed in 2020. Therefore, we also started to prepare for the future and are asking the European and national policy makers for a continued partnership under the new EU Research & Innovation Framework programme (FP9).

The coming pages provide more detailed information about our activities and achievements.

Dirk CARREZ
Executive Director



Dirk CARREZ
Executive Director



02

ABOUT

THE BIO-BASED INDUSTRIES CONSORTIUM

BIC is a non-profit organisation set up in Brussels in 2013.

2.1 WHO WE ARE

BIC is a non-profit organisation set up in Brussels in 2013. BIC represents the private sector in a Public-Private Partnership (PPP) with the European Commission, also known as the **Bio-based Industries Joint Undertaking (BBI JU)**.

The BBI JU, operating under Horizon 2020, was set up as one of the pillars of the EU Bioeconomy strategy¹ (2012).

The BBI JU is dedicated to transforming renewable, natural resources into bio-based products through a programme of research and innovation activities.

To contribute to society's long-term sustainability, BBI JU aims to:

- Demonstrate new technologies to fill the gap in value chains
- Develop business models integrating all economic actors along the value chain
- Set-up flagship biorefinery plants deploying business models & technologies to keep investment in EU

The BBI JU is driven by the **Vision²** and **Strategic Innovation and Research Agenda (SIRA)³** developed by BIC. The SIRA reflects the industries' vision of a competitive, innovative and sustainable Europe leading the transition towards a bioeconomy, while decoupling economic growth from resource depletion and environmental impact.

2.2 MISSION

BIC's mission is to build innovative **bio-based value chains** by developing new biorefining technologies, optimising feedstock use, and creating a favourable business and policy climate to accelerate market acceptance of bio-based products.

BBI JU's financial contribution will support the **large-scale commercialisation** of high-quality bio-based products through investment in innovative manufacturing facilities and processes, as well as in biorefining research and demonstration projects.

2.3 BIC GOVERNANCE

BIC General Assembly

BIC's main decision-making body is the General Assembly. All industry (full) members have a seat. The General Assembly meets once a year.

BIC Board and Executive Committee

BIC is managed by the Board of Directors. Elected by the General Assembly, the Board has a two-year mandate. Every year, half of the Board is renewed through General Assembly elections. The Board implements the BIC policy and the General Assembly work program.

The Board is supported by several Working Groups and the BIC Office.

1 Commission Communication of 13 February 2012 entitled «Innovating for Sustainable Growth: A Bioeconomy for Europe»: <http://ec.europa.eu/research/bioeconomy/index.cfm?pg=policy&lib=strategy>

2 BIC Vision: Accelerating innovation and market uptake of bio-based products - http://biconsortium.eu/sites/biconsortium.eu/files/downloads/BIC_BBI_Vision_web.pdf

3 BIC SIRA: <http://biconsortium.eu/sites/biconsortium.eu/files/downloads/SIRA-2017-Web.pdf>

In February 2017, new members were elected to the Board⁴.

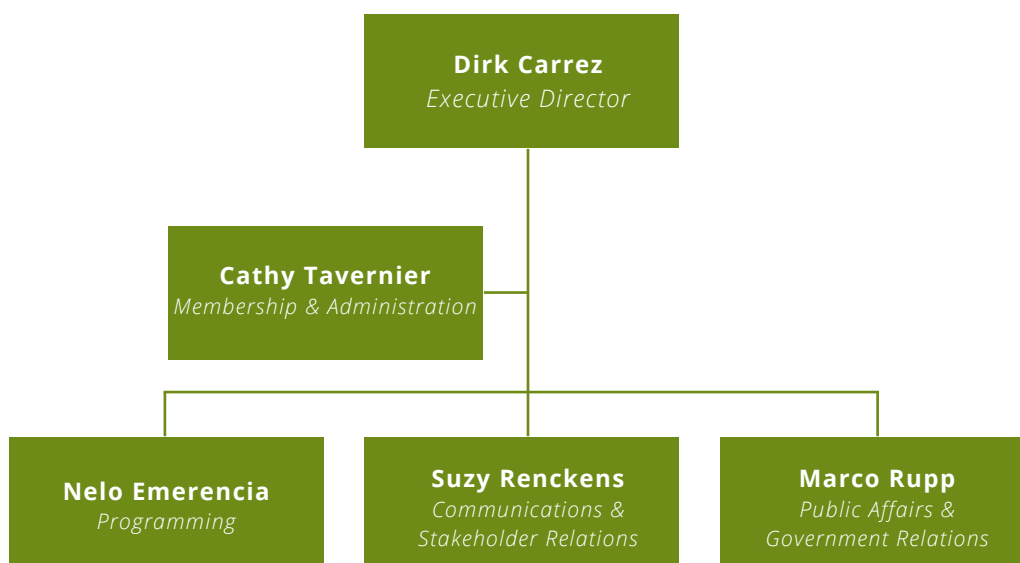
Mat Quaedvlieg Chair, SAPPI	Krijn Rietveld Vice-Chair, DSM	Christophe Luguel, Vice-Chair, IAR	Marcel Wubbolts Corbion
Claus Crone Fuglsang Novozymes	Niklas von Weymarn Metsa	Agnes van Ardenne Dutch Biorefinery Cluster	Giulia Gregori Novamont
Laila Rogestedt/ Catrin Gustavsson Sodra	Camille Burel Roquette	Gloria Gaupmann Clariant	Stefania Pescarolo Biochemtex

BIC Working Groups

The BIC **Programming Working Group (PWG)**, which includes all BIC industry members, develops topics for the Annual Work Plans (AWPs). After approval by the BIC Board and the BBI JU Governing Board, the AWPs form the basis of the BBI JU Annual Calls for Proposals. A small Programming Core Team (PCT) prepares details of the topics for further discussion with the PWG. PCT membership is reviewed annually.

The **Public Affairs Working Group (PA WG)** outlines BIC's advocacy and communications strategy on behalf of the Board. The PA WG aims to make the bioeconomy a political priority by engaging with bioeconomy stakeholders and decision-makers. The Group advocates for a coherent, flexible and stimulating policy and investment environment for bio-based solutions.

BIC Office



⁴ The current composition of the BIC Governing Board can be found on the BIC website: <http://biconsortium.eu/about/governance>

In October 2017, BIC welcomed Marco Rupp as new staff member and the team was reorganised as follows:

Dirk Carrez

Dirk Carrez is BIC's Executive Director. He is responsible for the day-to-day management of the association. A bioengineer, he holds a PhD in Agricultural Sciences. During 2017, Dirk was a member of the EC Expert Group for Bio-based Products and of the Expert Group reviewing the European Bioeconomy Strategy, and a member of the advisory board of several European projects.



Cathy Tavernier

Cathy Tavernier is responsible for administrative and financial aspects within BIC. She is the main point of contact for all questions regarding BIC membership (applications, invoices, member area access, etc.).



Suzy Renckens

Suzy Renckens manages BIC's Communications & Stakeholder relations. Suzy graduated as Engineer in Chemical and Bio-industries and holds a Ph.D. in Applied Biological Sciences. During her career, she acquired extensive experience in biotechnology regulatory and governmental affairs.



Nelo Emerencia

Nelo Emerencia manages BIC's Programming activities. He graduated as a Chemical Engineer from the Delft University of Technology. Nelo's expertise covers a broad range of subjects from engineering and operations, economics and planning, to marketing, communication and public affairs, as well as education and innovation.



Marco Rupp

Marco Rupp manages Public Affairs & Governmental Relations at BIC. Marco graduated as economist. During his career he gained a strong public affairs expertise, holding management positions in consultancies and corporate representations as well as the EU Institutions.





In 2017, BIC moved to a larger office in the European Forestry House, which also can be used for small working group meetings.



BIC membership

BIC has more than 200 industry members including large companies and SMEs (either as direct member or represented via their national/regional SME cluster). BIC has also more than 140 associate members, such as RTOs (Research and Technology Organisations), universities, technology platforms and regional organisations. Host to a unique mix of sectors, BIC's membership currently includes agriculture, aquaculture, agri-food, food processing, technology providers, forestry/pulp and paper, chemicals, energy and biofuels, and end-users.

To achieve its goals, BIC industry members put forward ideas for research topics, demonstration and flagship projects - based on commonly identified challenges and priorities - for the annual BBI JU Work Plans. They also decide how to address non-technical issues affecting the bio-based industries.

Through investments in innovative manufacturing facilities and processes, as well as in biorefining research and demonstration projects, the financial contributions made by BIC members support the large-scale commercialisation of high-quality bio-based products from different types of feedstocks, including residues and bio-waste.

BIC welcomes membership applications from interested stakeholders from across the bio-based value chain. In particular, BIC invites feedstock providers and brand owners to its membership. Brand owners can steer the development of novel bio-based applications and support the market uptake of bio-based products. Brands can participate in research, demonstration or flagship projects by joining BBI JU consortia. Their involvement can help to shorten the time to market for innovative bio-based products.

In 2017 BIC welcomed 21 new Full members and 35 new Associate members, signalling BIC's ability to drive the European bioeconomy forward by bringing the bio-based industries together. This growth shows strong industry commitment and support for the BBI JU.

The list of BIC Full and Associate members is provided in the Annex.

Finances

BIC's own operational costs are covered by the membership fees.

BIC pays also 50% of the operational costs of the BBI JU, the other half is financed by the European Commission. Therefore, consortia of successful proposals are requested to pay a Project Contribution (see FAQs on the BIC website). The Contribution is not an eligible cost and can only be used to finance the BBI programme office.





03 **IMPACT**
OF THE BBI JU

Since it was set up, the BBI JU has helped to build the European bio-based economy.

At the end of 2017, the total number of beneficiaries is 729 covering 65 ongoing projects, with a total funding of € 414 million.

The leverage effect is demonstrating very good progress in 2017, at 2,56 euros of private investment per 1 euro of EU funding, against an expected level of 2,26 euros at this stage of the initiative.

729

beneficiaries

65

ongoing projects

€ 414m

funding

3.1 BBI JU CALL FOR PROPOSALS 2016

In 2017, the final results of BBI JU 2016 Call were announced and granted projects were launched.

The 2016 Call topics included new research on algae and aquatic biomass, industrial crop varieties and biomass from new sources (e.g. municipal solid waste), as well as waste streams and by-products from the food industry.

A total of 103 proposals were submitted in response to the 2016 Call which had an indicative budget of 188.65 Million Euros BBI JU funding: 7 CSA, 70 RIA proposals, 20 DEMO proposals, 6 Flagship proposals. 29 Projects were invited to the Grant Agreement Preparation process.

103

proposals submitted

€ 188m

BBI JU funding

29

funded projects

The call funded:

2 flagship projects & *a 3rd from the 2015 call which started in 2017*

AgriChemWhey

An integrated biorefinery for the conversion of dairy side streams to high value bio-based chemicals

PEference

From bio-based feedstocks via di-acids to multiple advanced bio-based materials with a preference for polyethylene furanoate

LignoFlag

Commercial flagship plant for bio-ethanol production involving a bio-based value chain built on lignocellulosic feedstock

15 Research and Innovation Action (RIA) projects

ABACUS

Algae for a biomass applied to the production of added value compounds

AFTERLIFE

Advanced Filtration TEchnologies for the Recovery and Later conversion of relevant Fractions from wastEwater

BARBARA

Biopolymers with advanced functionalities for building and automotive parts processed through additive manufacturing

BioBarr

New bio-based food packaging materials with enhanced barrier properties – BioBarr

BIOSEA

Innovative cost-effective technology for maximizing aquatic biomass-based molecules for food, feed & cosmetic applications

BIOSMART

Bio-based smart packaging for enhanced preservation of food quality

ECOXY

Bio-based recyclable, reshapable and repairable (3R) fibre-reinforced EpOXY composites for automotive and construction sectors

MAGNIFICENT

Microalgae As a Green source for Nutritional Ingredients for Food/Feed and Ingredients for Cosmetics by cost-Effective New Technologies

PERCAL

Chemical building blocks from versatile MSW biorefinery

POLYBIOSKIN

High performance functional bio-based polymers for skin-contact products in biomedical, cosmetic and sanitary industry

RefuCoat

Full recyclable food package with enhanced gas barrier properties and new functionalities by the use of high performance coatings

ReSolve

REnewable SOLVEnts with high performance in application and improved toxicity profile

SHERPACK

Innovative structured polysaccharides-based materials for recyclable and biodegradable flexible packaging

SSUCHY

Sustainable structural and multifunctional bio-composites from hybrid natural fibres and bio-based polymers

VALUEMAG

Valuable Products from Algae Using New Magnetic Cultivation and Extraction Techniques

9 DEMO projects

BIOMOTIVE

Advanced BIObased polyurethanes & fibres for the autoMOTIVE industry with increased environmental sustainability

Dendromass4Europe

Securing Sustainable Dendromass Production with Poplar Plantations in European Rural Areas

EMBRACED

Establishing a Multi-purpose Biorefinery for the Recycling of the organic content of AHP waste in a Circular Economy Domain

EUCALIVA

EUCAllyptus Lignin VALorisation for Advanced Materials and Carbon Fibres

GRACE

GRowing Advanced industrial Crops on marginal lands for biorEfineries

LigniOx

Lignin oxidation technology for versatile lignin dispersants

OPTISOCHEM

OPTimized conversion of residual wheat straw to bio-ISObutene for bio-based CHEMicals

SYLFEED

From forest to feed: enable the wood industry to bridge the protein gap

URBIOFIN

Demonstration of an integrated innovative biorefinery for the transformation of Municipal Solid Waste (MSW) into new bio-based products

3 Coordination and Support Actions (CSA)

BiOPEN

Open innovation platform

Pilots4U

A network of bioeconomy open access pilot and multipurpose demo facilities

RoadToBio

Roadmap for the Chemical Industry in Europe towards a Bioeconomy

More detailed information about these projects can be found on the BBI JU website: www.bbi-europe.eu/projects

3.2 BBI JU CALL FOR PROPOSALS 2017

The 2017 Call for Proposals was launched on 11 April 2017. It provides up to €81 million in funding from BBI JU, with additional industry investment.

The AWP 2017 built further on the 4 strategic orientations (Feedstock, Process, Products, and Market uptake) but moved away from a strict biomass feedstock 'push' based on the traditional value chains, towards a demand for biomass to enable processing to respond adequately to a 'pull' from the end markets. The deadline for submissions was 7 September 2017.

In response to the 2017 Call, a total of 149 proposals were submitted: 13 CSA proposals, 67 RIA proposals, 62 DEMO proposals and 7 Flagship proposals.

The BBI JU Governing Board approved the evaluation results on 13 December: 17 proposals were invited to the Grant Agreement Preparation process.

More detailed information about the Calls for Proposals can be found on the BBI JU website⁵:



3.3 AMENDMENT OF THE BBI JU REGULATION

The EC – supported by BIC - decided to propose an amendment of the Council Regulation to allow financial contribution at project level being counted as a contribution towards BIC's commitment. The EC initiated the procedure at the end of 2016. The amendment to the CR was adopted at the ECOFIN Council on 23 January 2018.

FAQ: Why a cash contribution at project level?

Large industries are not eligible for funding in Coordination and Support Actions (CSAs) and Research & Innovations Actions (RIAs). However, when they participate in such projects, industry members can 'outsource' research to consortium partners by a cash transfer within the project.

⁵ www.bbi-europe.eu/participate/calls-proposals

A large, leafy green tree stands in a rural landscape under a blue sky. The tree is the central focus, with its branches spreading out. In the background, there are other trees and a fence. The sky is a clear, bright blue with a few wispy clouds. The overall scene is peaceful and natural.

04

BIC ACHIEVEMENTS IN 2017

BIC reached out to European bioeconomy regions and continued raising awareness about the impact of the BBI JU and bio-based industries.

BIC reached out to European bioeconomy regions and continued raising awareness about the impact of the BBI JU and bio-based industries.

BIC prepared the topics for the BBI JU 2018 Annual Work Plan, published the updated SIRA and a number of reports, media articles and positions papers.

BIC advocated for a strong link between the European Circular Economy and Bioeconomy strategies and for a continuation of the BBI JU after 2020.

4.1 INVESTING IN THE EUROPEAN BIOECONOMY

Industry is participating on a large scale in BBI JU projects. Through demonstration and flagship projects, BBI JU supports deployment while keeping investments in Europe and attracting financing for innovation from outside the EU.

According to BIC's annual survey, in 2017 BIC members had a €5 billion pipeline of investments, whereas this was €4 billion in 2016 and €2 billion in 2015.

4.2 THE BOARD AND WORKING GROUPS

The BIC Board concluded its **project BIC 2.0** and agreed to broaden BIC's activities with increased focus on Public Affairs and Communications & Stakeholder relations.

The **role of regions** was the main focus of the 2017 General Assembly Open Session, which provided 13 regions with the opportunity to pitch BIC Full members to explain regional strengths, available biomass and potential financial incentives. BIC also gave the floor to the Vanguard Initiative Bioeconomy Pilot, which is aimed at facilitating the creation of cross-regional demonstration projects using smart specialisation strategies.

The Programming Working Group developed the **2018 Priority Paper** following input from BIC members and advice of the two BBI JU advisory bodies, the Scientific Committee (SC) and the States Representatives Group (SRG). The 2018 Priority Paper set the basis for the topics in the **2018 Annual Work Plan** (AWP) of the BBI JU.

The Public Affairs working group focused mainly on **Circular Economy package**, the **Renewable Energy Directive** and **FP9**, the successor of Horizon 2020, preparing for a '**BBI 2.0**', a possible follow up to BBI JU (post 2020).

BIC gained visibility on social media and as from October 2017 onwards, replaced its monthly digital newsletter by a weekly edition, to regularly inform the members about relevant policy and/or bioeconomy, as well as programming and market developments. BIC also supported the BBI JU to hold its first Stakeholder Forum.

BIC staff had several meetings with policy makers and participated in a number of key bioeconomy events. BIC staff also regularly met with (potential) members and other bioeconomy stakeholders.

4.3 PUBLICATIONS

Strategic Innovation and Research Agenda Update



BIC published its new Strategic Research and Innovation Agenda (SIRA) to broaden participation in BBI JU calls. The new SIRA re-emphasises the BIC position that a bio-based economy is 'circular by nature' and builds further on BIC's four strategic orientations:

- Fostering a **supply of sustainable biomass-feedstock** to feed both existing and new value chains
- Optimising **efficient processing** for integrated biorefineries through R&D
- Developing **innovative bio-based products** for identified market applications
- Creating and accelerating **market uptake** of bio-based products and applications

The updated SIRA addresses the technological and innovation challenges facing the bio-based industries, takes a 'multi-value-chain' approach and integrates new feedstocks such as aquatic-based sources, bio-waste (including from food processing) and CO₂. It also considers the aims of BIC's newest members, as well as technology and market developments since the first Agenda was adopted in 2013. The SIRA identifies the research and innovation actions needed to deliver tangible and increasingly ambitious environmental, social and economic benefits by 2020 and 2030.

Bioeconomy regions in Europe

Key to the success of the BBI JU project success is interregional cooperation, which fosters bio-based technology scale up.

BIC developed a brochure in which bioeconomy regions can present themselves in a 2-pager, providing relevant qualitative and quantitative information on the region. This 'living' document will be updated with further regional contributions.



Finance report



In December, BIC released a new overview of financial instruments available to support European bioeconomy development. 'Access to EU financial instruments suitable for the implementation of large bio-based industry investments' outlines a range of funding opportunities and explores the synergies between different instruments for co-financing bio-based projects.

Bioeconomy investments are crucial to reduce Europe's dependence on non-renewable resources and to make our economy more sustainable. BIC's report is a practical guide for anyone looking to invest in the bioeconomy, providing a breakdown of applicable instruments and co-funding opportunities, ranging from debt and equity to quasi-equity financing and grants.

EU financial instruments discussed include BBI JU/ Horizon 2020 grants, EIB/InnovFin, the European Fund for Structural Investments (EFSI), European Structural and the Investment Funds (ESIF) and the recently announced Circular Bioeconomy Thematic Investment Platform (TIP). The report also includes information on other sources of funding such as the European Bank for Reconstruction and Development (EBRD).

Biorefinery poster



To make European bio-based activities more visible, BIC and nova-Institute developed a poster that maps the commercial biorefineries in Europe anno 2017.

Between July and November, a survey was organised to gather biorefinery information across Europe. In total 224 biorefineries have been mapped. The oil-/fat-based biorefineries mainly

produce biodiesel (64) or oleochemicals (54); 63 sugar-/starch-based bio-refineries mainly produce bioethanol but also products for use in food or feed or biochemicals; 25 wood-based biorefineries (excluding pulp for paper only) produce pulp, tall oil, specialty cellulose or bioethanol; 5 biorefineries produce cellulosic fibre or bioethanol from other lignocellulosic feedstock such as wheat straw, Miscanthus or switch grass; 13 biorefineries produce bioethanol or biodiesel from bio-waste (incl. food waste).

Articles

Agro & Chemistry published several articles and blogs about BIC: 'Crucial role of the regions', 'Bio-based economy in Europe on the right track!' on the growing mobilisation of private investment in Europe, 'Markets get a leading role' in the new SIRA and 'BIC presents overview of financial instruments' dedicated to finance report.

BIC published an article in the December 2017 **European Files magazine** which was fully dedicated to the European Joint Technology Initiative (JTIs) and corresponding Joint Undertakings under H2020.

4.4 POSITION PAPERS AND MEETINGS WITH POLICY MAKERS

The focus of the BIC Public Affairs Working Group in 2017 was on two priorities:

- Position the bio-economy positively vis-à-vis policy-makers and in the context of bio-based industries, innovation, jobs and growth, low-carbon solutions, resource-efficiency, sustainability and circular economy
- Advocate on policy initiatives that are related to a continuation of Public Private Partnerships of Bio-based Industries beyond Horizon 2020.

To that end, the BIC Public Affairs working group drafted a number of position papers (see below) to support both priorities. BIC also met with political

representatives from the European Commission, the European Parliament, EU Members States and the Committee of the Regions in support of the two priorities. In addition, we build alliances to leverage the BIC advocacy work. A key ally was the European Bioeconomy Alliance (see 5.1).

Position on REDII

In the position paper 'Sustainable bioenergy contributes to the EU's long-term decarbonisation target', published in April, BIC highlighted the role of sustainable bioenergy, biogas and biofuels in the bioeconomy and called for a level playing field for the bio-based industries, in the context of the

European Commission's proposal for a recast of the Renewable Energy Directive (RED II).

Paper on the impact of the BBI JU

The paper "The BBI JU - An Institutional PPP supporting the Bioeconomy Strategy", published in June, describes the current and future impacts of the Bio-Based Industries Joint Undertaking (BBI JU) and how contributes to green growth in Europe, reindustrialisation and development of rural areas, and helps the transition towards a Circular and Low Carbon Economy creating new markets for bio-based products and finding synergies between European financial instruments.

Fostering Europe's sustainable bioeconomy revolution

In October BIC called for a continued partnership with the European Commission under the new EU Research & Innovation Framework programme (FP9). BIC asks for a continuation of the current BBI JU (a "BBI 2.0.") because:

- Funding from the BBI JU is crucial in order to turn research into innovation and deployment in Europe and to develop a competitive European bioeconomy.
- BBI JU brings together different sectors and entire value chains, mobilising the relevant stakeholders, ranging from SMEs to large companies, from resource & technology providers to brand owners.

4.5 PRESS RELEASES AND MEDIA COVERAGE

In 2017, BIC published three press releases which were widely distributed to the European and bioeconomy press.

The first press release **BIC General Assembly: Growing Membership Deepens Bioeconomy Cooperation** was published in February. The press release **BIC Announces New SIRA Roadmap to Develop Europe's Bioeconomy** was published in June.

In December, BIC's **Launches New Report to Help Bioeconomy Projects Access Finance**

press release announced BIC's new overview of financial instruments available to support European bioeconomy development.

BIC press releases received coverage in leading bioeconomy publications including the Biofuels Digest, Bio-Based World News, Biomass Magazine, Polyestertime, Paint&Coatings Industry, Agro & Chemistry, Il Bioeconomista, bioplastics MAGAZINE, bio-fibre magazine, Innovators Magazine, Global Renewable News, BEsustainable, as well as in local news outlets in UK, France The Netherlands, USA and China.

4.6 NEWSLETTER

As from October 2017, BIC replaced its monthly digital newsletter for BIC members, 'The BIC Picture', by a weekly edition, to regularly inform the members about BIC's public affairs and programming activities as well as relevant policy

and bioeconomy market developments, the BBI JU (projects), the European Commission, Country news, General bioeconomy information and Opinions. The newsletter also includes an agenda of major bioeconomy events.

4.7 WEBSITE AND SOCIAL MEDIA

The BIC website (www.biconsortium.eu) includes information on BIC's governance and activities, has dedicated webpages for BIC's members and a series of Success Stories showcase BIC members' investments in the European bioeconomy. It announces new publications and developments.

BIC intensified its social media outreach. By end of 2017, BIC had 3000+ followers on the @biconsortium Twitter account.

4.8 EVENTS CALENDAR

BIC staff participated in a number of key bioeconomy events as speaker, moderator, panellist or to brand BIC and BBI JU.

15-16 | General Assembly and Matchmaking Event

FEBRUARY

Brussels, Belgium

The BIC General Assembly featured presentations on:

- 3 years BBI JU
- 13 bioeconomy regions
- the Vanguard Initiative Bioeconomy Pilot

The BIC Match Making Event (MME) welcomed more than 200 participants. The MME facilitated interaction between industry and non-industry members and included interactive meetings and workshops.

9 | Towards a Sustainable and Innovative Bioeconomy

MARCH

Riga, Latvia

At this Bioeconomy Forum several Nordic case studies were presented as well as the BBI JU and BIC.

16 | Why is membership BIC important?

MARCH

Oslo, Norway

This workshop for stakeholders from academia and industry explained how BIC and the BBI JU work together and how the topics in the BBI JU calls are suggested by the members of the BIC.

28 | **Forum for the Future of Agriculture**

MARCH

Brussels, Belgium

BIC and BBI JU shared a small booth at this major agriculture conference in Brussels.

28 | **BBI JU Info Day**

APRIL

Brussels, Belgium

BBI JU organised its third Info Day in Brussels, following the official launch of the 2017 BBI Call for Proposals. BIC attended a small booth.

31 | **BIC-SRG Workshop**

MAY

Brussels, Belgium

This workshop of the BBI JU States Representatives Group (SRG) focused in the state of play of BIC and the BBI JU.

6 | **Bio-based industries opportunities in H2020**

JUNE

Dublin, Ireland

InterTradeIreland, the Department of Agriculture, Environment & Rural Affairs Northern Ireland and the Department of Agriculture, Food & Marine Ireland, the Marine Institute and University College Dublin partnered to hold an all-island networking and information event on BIC and the BBI JU 2017 Call for Proposals.



23-26 JULY | BIO World Congress on Industrial Biotechnology

Montréal, Canada

BIC participated in a breakfast event and took part in several one-on-one meetings with companies and brand owners.



14 SEPTEMBER | Final ESCSS conference

Brussels, Belgium

The final conference of the European Sustainable Chemicals Support Service (ESCSS) took place at the European Chemical Regions Network (ECRN), with presentations from 6 EU 'Model Regions' and an introduction of the Self-assessment tool developed through the initiative.



4-6 OCTOBER | EFI 2017 Annual Conference

Oslo, Norway

The EFI event was organised in cooperation with the Norwegian University of Life Sciences (NMBU) and The Norwegian Institute for Bioeconomic Research (NIBIO).

9-11
OCTOBER

European Forum for Industrial Biotechnology and the Bio-based Economy (EFIB)

Brussels, Belgium

EFIB is a renowned annual conference on industrial biotech and the bio-based economy for businesses and policymakers. The 2017 edition attracted 650 professionals for three days of presentations, workshops, a PitchFest and trade fair. BIC participated in a session and had several one-on-one meetings with industry representatives.



17-18
OCTOBER

Polish Study Visit on Bioeconomy

Brussels, Belgium

'Polish excellence for sustainable development of Bioeconomy in Europe' was organised by the Polish NCP and brought a number of Polish companies in contact with BIC members.

26-27
OCTOBER

Innovation in Action

Strasbourg, France

This exhibition of the seven Joint Undertakings (JUs) at the European Parliament, sponsored by MEP Miroslav Poche, aimed to raise awareness around their potential in the European innovation and research area. The official opening of the event included a speech by Carlos Moedas, the European Commissioner for Research, Science and Innovation, who underlined that 'partnerships are one of the most important things we do in research'.



16 | **H2020 Bioeconomy Policy Day**

NOVEMBER

Brussels, Belgium

BIC presented BBI JU at ESIB, a summit organised by the Austrian Centre of Industrial Biotechnology. The event aims to become an annual meeting hub for European industrial biotechnologists to help them enhance their networks and establish new connections.

6-7 | **BBI JU Stakeholder Forum**

DECEMBER

Brussels, Belgium

The Forum was dedicated to engaging directly in dialogue with BBI JU's stakeholders and included plenary keynote speeches, high-level discussions with expert panels, thematic breakout sessions, with plenty of networking possibilities. The 65 ongoing projects were given an opportunity to present their consortium and details of their project in a dedicated exhibition and in thematic workshops.

7 | **Financing the Circular Bioeconomy - Structuring an Investment Platform to Improve Access to Finance in Europe**

DECEMBER

Brussels, Belgium

The EC and the EIB asked market views on ways a new investment vehicle they are planning could coax private capital into the bioeconomy.

12 | **Visit to Metsä Group's Bioproduct mill**

DECEMBER

Äänekoski, Finland

The BIC & BBI JU Board and staff were invited to visit the world's first next-generation bioproduct mill in Äänekoski. With a cost of EUR 1.2 billion, the mill is the largest investment in the history of the Finnish forest industry. It will produce pulp and a wide selection of other bioproducts.



14 | **Bioeconomy Investment Summit**

DECEMBER

Helsinki, Finland

The Summit discussed the potential the bioeconomy has to offer in building a sustainable future, and how to mobilize investments to unlock that potential.



05 ALLIANCES

5.1 EUROPEAN BIOECONOMY ALLIANCE

BIC is a founding member of the the European Bioeconomy Alliance (EUBA), a unique cross sector alliance dedicated to mainstreaming and achieving the full potential of the European bioeconomy. EUBA advocates for a favourable and coherent policy and investment framework for the development of a competitive and sustainable bioeconomy in Europe.



EUBA position papers and outreach

January 2017

The EUBA published its position paper on **The Role of Bioeconomy in the Circular Economy – Taking circularity beyond waste.**

February 2017

The position paper, **Sustainable production of EU-grown renewable raw materials** was adopted and used in EUBA outreach towards European policy makers.

The European Bioeconomy Alliance (EUBA) believes that promoting and supporting sustainable biomass production in the EU is key to further developing the bioeconomy, and consistent with worldwide sustainable development based upon non-depleting natural resources. This should be better addressed through the review of the Bioeconomy Strategy.

September 2017

EUBA wrote a **letter to Elżbieta Bieńkowska**, Commissioner for Internal Market, Industry, Entrepreneurship and SMEs, stressing that the forthcoming EU Plastics Strategy could contribute to driving innovation and sustainable development of the plastics industry, if designed and implemented appropriately. The EUBA proposed concrete policy steps that would enable bio-based products such as bioplastics to reach the market in an era of low oil prices.

The letter was acknowledged by Vice-Presidents Timmermans and Katainen.

EUBA also published its **5 Policy asks** for the bioeconomy strategy revision, calling for the implementation of concrete measures and long-term support across 3 themes:

Availability of sustainably produced biomass

1. Circular bioeconomy should be an integral part of EU-level frameworks and policies;

Fostering Investment

2. Increase funding and improve coherence of financing mechanisms for the circular bioeconomy;

3. Secure the Bio-based Industries Joint Undertaking (BBI JU) 2.0;

Market development

4. Incentives for bio-based products in strategic sectors;

5. Promote bio-based products' visibility to stimulate market demand.

November 2017

In **letters to Vice-Presidents Timmermans and Katainen, the Secretariat-General, and Commissioners Vella, Moedas, Hogan and Bieńkowska**, EUBA expressed its disappointment with the lack of ambition and policy coherence in the draft Plastics Strategy and imbalanced consideration of bio-based plastics. The draft fails to create a clear link between the bioeconomy and the circular economy and to capture the potential for circular benefits of bio-based plastics designed for mechanic or organic recycling.

On the occasion of the EU Bioeconomy Policy Day and of the release of the “Staff Working Document on the review of the 2012 European Bioeconomy Strategy”, EUBA issued a **press release**, calling for an ambitious revision of the 2012 EU Bioeconomy Strategy and for a time-bound and measurable Action Plan. The press release with title **Five policy asks for a strong European bioeconomy** referred to the bioeconomy strategy revision, calling for concrete measures and long-term support for sustainably-produced biomass, fostering investment and market development.

During the ‘EU Bioeconomy week’ EUBA also launched a **social media campaign** with the 5 policy asks for the bioeconomy strategy.

EUBA Events

January 2017

EUBA co-organised a successful and well-represented event: **The role of Bioeconomy in the Circular Economy: taking circularity beyond waste** hosted by MEPs Miapetra Kumpula-Natri and Miriam Dalli. The event brought together MEPs, Member State representatives, the scientific community and representatives from industry to discuss the synergies between the bioeconomy and the circular economy.

EUBA had a meeting with Phil Hogan, Commissioner for Agriculture and Rural Development, on the importance of the development of a coherent,

holistic and supportive policy framework for sustainable EU-grown biomass. Research and innovation has huge potential to help farmers and forest owners enhance the sustainable production of biomass and further develop the bioeconomy. EU investment tools are crucial to boost investments in the EU and create jobs and growth in rural areas.

April 2017

EUBA hosted a Bioeconomy session at the **Plant Based Summit** (25-26 April) in Lille, France.

Agnes van Ardenne, CEO of the Dutch Biorefinery Cluster and Member of the BIC Board, gave the plenary talk.

September 2017

On Thursday 28 September Miapetra Kumpula-Natri, MEP and Chair of the working group on Bioeconomy hosted a breakfast debate, organised by EUBA, entitled ‘Building an effective Bioeconomy Strategy’. The event gathered policy-makers and stakeholders in the European Parliament to assess the achievements of the 2012 European Bioeconomy Strategy and highlight the next steps moving forward. The EUBA presented its 5 policy asks.

November 2017

On 16 November, at the end of the EC Bioeconomy Policy day, EUBA invited Bioeconomy stakeholders for a **networking cocktail** on 16 November during which it presented its 5 policy asks for the bioeconomy strategy.

5.2 INDUSTRY 4.0 COALITION

In March BIC joined 124 other industry associations in calling for a strong industrial strategy. In the ‘Joint declaration for an ambitious EU Industrial strategy’, the European manufacturing industry, representing a diverse range of sectors, called on the European Commission to: (1) reaffirm its commitment to reaching the target of 20% of GDP from industry, with an ambitious and realistic timeline; (2) adopt an Action Plan to tackle the challenges that the

industrial sectors are facing, in the framework of a Communication that would include concrete steps and milestones; and (3) commit to implement this Action Plan in a timely manner and regularly report on progress.

In October, the coalition published the Joint Reaction Paper “For an ambitious EU industrial strategy: going further”.



06

ANNEXES

BIC 2017 MEMBERSHIP

For further information or to become a member of BIC, please visit our website www.biconsortium.eu or email info@biconsortium.eu

Full members

- AB InBev
- Agro Business Park
- AkzoNobel
- AlgaEnergy
- Apeiron Synthesis
- ARD - Agro-Industrie Recherches et Développements
- Avantium
- BASF
- BE-Basic Foundation
- BEECO - Bio Eco Energy Company
- BII - Bio-marine Ingredients Ireland
- Bio Base Europe Pilot Plant
- Biobased Delta
- Biochemtex
- BioEconomy Cluster
- Bio-mi
- Bionet engineering
- Biopolis ADM
- BIOPRO Baden-Württemberg
- Bioproton Europe
- Biosphere
- BioVale
- BLC3 Association
- Borregaard
- BPF - Bioprocess Pilot Facility
- Carbery Food Ingredients
- Cargill
- CelluComp
- Celtic Renewables
- Clariant
- CLIB2021
- CLIC Innovation
- Cluster FOOD+i
- Consorzio Italbiotec
- Corbion
- CoSun
- CTA - Corporacion Tecnologica de Andalucia
- DSM
- Dupont Industrial Biosciences
- Dutch Biorefinery Cluster
- Energochemica
- Evonik
- Exergy
- Fater
- Fertinagro
- Flanders Food
- GFBiochemicals
- Glanbia Ingredients Ireland
- GreenWin
- IAR - Industries & Agro-Ressources
- IBioIC - Industrial Biotechnology Innovation Centre
- Idener
- Innoven
- ISPT - Institute for Sustainable Process Technology
- KMC
- Lygos
- METabolic Explorer
- Metgen
- Metsä Group
- MicroA
- Mi-plast
- Monaghan Mushrooms Group
- Neste Corporation
- Norske Skog Golbey
- Novamont
- Novozymes
- Oleon
- Orineo
- Ørsted
- Particula Group
- Plastica Alfa
- Sappi
- SAV - Agricultores de la Vega de Valencia
- SBIOC - Spanish BioCluster
- Six Fifty
- Smurfit Kappa
- Södra
- Soremartec - Ferrero Group
- Stora Enso
- Südzucker
- SUSPACC - Sustainable Products and Chemicals Cluster
- Tectero
- TIPA
- Total
- Transfurans Chemicals
- Unilever
- UPM
- Versalis
- Vertech Group

Associate members

- 3N Lower Saxony Network for Renewable Resources
- Aalto University
- Aarhus University - Danish Centre for Food and Agriculture
- Åbo Akademi University
- ACIB Austrian Centre of Industrial Biotechnology
- AIJU - Asociacion de Investigacion de la Industria del Juguete
- AIMPLAS - Technological Institute of Plastics
- AINIA Technology Centre
- AIT Austrian Institute of Technology
- AITEX - Textile Research Institute
- AITIIP Technology Centre
- Andaltec Plastic Technological Center
- Andalusion Region
- ARCMED - Association of Mediterranean Forest Owners
- Automotive Industry Institute
- Ayming
- Bay Zoltan Nonprofit Ltd. For Applied Research
- Bio Deutschland
- Bio4Energy
- Bioplat - Spanish Biomass Technology Platform
- Boku - University of Natural Resources and Life Sciences
- Ca' Foscari - University of Venice
- Campus Iberus
- CBB Capbiotek
- CEA
- CEFIC - European Chemical Industry Council
- CENER - National Renewable Energy Center
- Centexbel
- CEPF - Confederation of European Forest Owners
- CEPI - Confederation of European Paper Industries
- Certech - The Centre of Technological Resources in Chemistry
- CERTH - Centre of Research and Technology Hellas
- Cetenma
- Chalmers University of Technology
- CIBE - International Confederation of European Beet Growers
- CIEMAT - Centro de Investigaciones Energéticas, Medioambientales y Tecnológicas
- CIRAD - Agricultural Research for Development
- CIRCE - Research Centre for Energy Resources and Consumption
- CNR - National Research Council of Italy
- CNRS - The National Center for Scientific Research
- CNTA - National Centre for Technology and Food Safety
- CoEBBE - Center of Expertise Biobased Economy
- Condorcet FRS
- COPA Cogeca
- CSIC - Spanish National Research Council
- CT Aqua - Andalusian Aquaculture Technology Centre
- CTFC - Forest Sciences Centre of Catalunya
- CTP - Centre Technique du Papier
- Danish Technological Institute
- DECHEMA - Society for Chemical Engineering and Biotechnology
- Diadikasia Business Consulting
- DTU - Biosustain - Centre for Biosustainability at the Technical University of Denmark
- DWI - Leibniz Institute for Interactive Materials
- ECN - Energy Research Centre of the Netherlands
- ENEA - Italian National Agency for New Technologies, Energy and Sustainable Economic Development
- Environment Park
- ERFO - European Recovered Fuel Organisation
- ERRMA - European Renewable Resources and Materials Association
- ESA - European Seed Association
- EuropaBio
- European Bioplastics
- FCBA - French Institute of Technology for Forest-based and Furniture Sectors
- FEUGA - Fundación Empresa - Universidad Gallega
- FoodDrinkEurope
- Forschungszentrum Jülich
- FORTH/ICE-HT - Foundation for Research and Technology Hellas - Institute of Chemical Engineering Sciences
- Fraunhofer

- FTP - Forest-based Sector Technology Platform
- Green Chemistry Institute
- IAPAN - Institute of Agrophysics of the Polish Academy of Sciences
- IFP Energies Nouvelles
- IK4 Research Alliance
- Imdea Energy
- INBIOTEC - Instituto de Biotecnología de León
- Ineris - L' Institut National de l' Environnement Industriel et des Risques
- INIA - National Institute for Agricultural Research and Experimentation
- InnoEXC
- Innovatum
- Innovhub SSI - Stazioni Sperimentali per l'Industria
- INRA - French National Institute for Agricultural Research
- Institute Charles Viollette
- INSTM - National Interuniversity Consortium of Materials Science and Technology
- Irish Bioeconomy Association
- IRMO - Institute for Development and International Relations
- IRTA - Research and Technology Food and Agriculture
- ITENE - Packaging, Transport and Logistics Research Centre
- ITERG - Institut des Corps Gras
- IVIA - Instituto Valenciano de Investigaciones Agrarias
- KIT - Karlsruhe Institute of Technology
- Kplus Wood - Kompetenzzentrum Holz
- KTH - Royal Institute of Technology in Stockholm
- KU-Leuven - Catholic University of Leuven
- Laborelec
- Lappeenranta University of Technology
- Leitat Technological Center
- LGP2 - Laboratoire de Génie des Procédés Papetiers
- Linköping University
- LIST - Luxembourg Institute of Science and Technology
- LSIWC - Latvian State Institute of Wood Chemistry
- LUKE - Natural Resources Institute Finland
- Lund University
- Luxinnovation - Cluster ECO - Innovation
- Materia Nova
- Matis
- NanoGUNE - Nanoscience Cooperative Research Center
- National Research Center Demokritos
- NIBIO - Norwegian Institute of Bioeconomy Research
- Norut Narvik - Northern Research Institute Narvik
- Nova-Institut
- NTNU - Norwegian University of Science and Technology
- NTUA - National Technical University of Athens
- NUI - National University of Ireland Galway
- Piteå Science Park
- PNO Innovation
- Rabobank
- RAIZ - Forest and Paper Research Institute
- RE-CORD - Renewable Energy Consortium for Research and Demonstration
- Regional Council of Kainuu
- RISE AB
- RIVM - National Institute for Public Health and the Environment
- RSB - Roundtable on Sustainable Biomaterials
- RTDS Association
- SciTech-Service
- SINTEF
- Skogforsk
- Spring - Sustainable Processes and Resources for Innovation and National Growth
- Starch Europe
- STU - Slovak University of Technology
- SusChem
- Swerea IVF AB
- Swerea SICOMP
- Tecnalia Corporation
- The James Hutton Institute
- Thünen Institute
- TNO - Netherlands Organisation for Applied Scientific Research
- TU Delft - Delft University of Technology
- TU Eindhoven - Eindhoven University of Technology
- TU Wien - Vienna University of Technology
- TUHH - Hamburg University of Technology
- UA - University of Alicante

- UAB - Universitat Autònoma de Barcelona
- UAH - University of Alcalá
- UAL - University of Almería
- UCA - University of Cádiz
- UCCS - Unité de Catalyse et de Chimie du Solide
- UCPH/IFRO - University of Copenhagen/Department of Food and Resource Economics
- Unimore - University of Modena and Reggio Emilia
- Unicre - Unipetrol Centre for Research and Development
- Università Cattolica del Sacro Cuore - Catholic University of the Sacred Heart
- University of Bologna
- University of Eastern Finland
- University of Ghent
- University of Graz
- University of Hohenheim
- University of León
- University of Naples «Federico II»
- University of Oulu
- University of Oviedo
- University of Rome «La Sapienza»
- University of Rovira - Virgili
- University of Salerno - Unison
- University of Santiago de Compostela
- University of Utrecht
- University of Valladolid
- University of Vigo
- UPVLC - Polytechnic University of Valencia
- Vito - Flemish Institute for Technological Research
- VTT Technical Research Centre of Finland
- WUR - Wageningen University & Research
- XAMK - South-Eastern Finland University of Applied Sciences



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