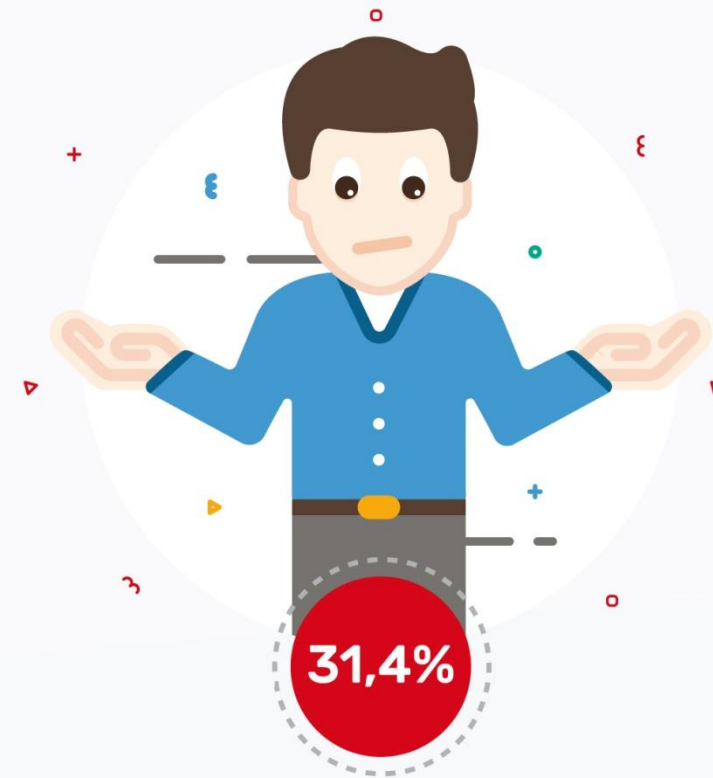
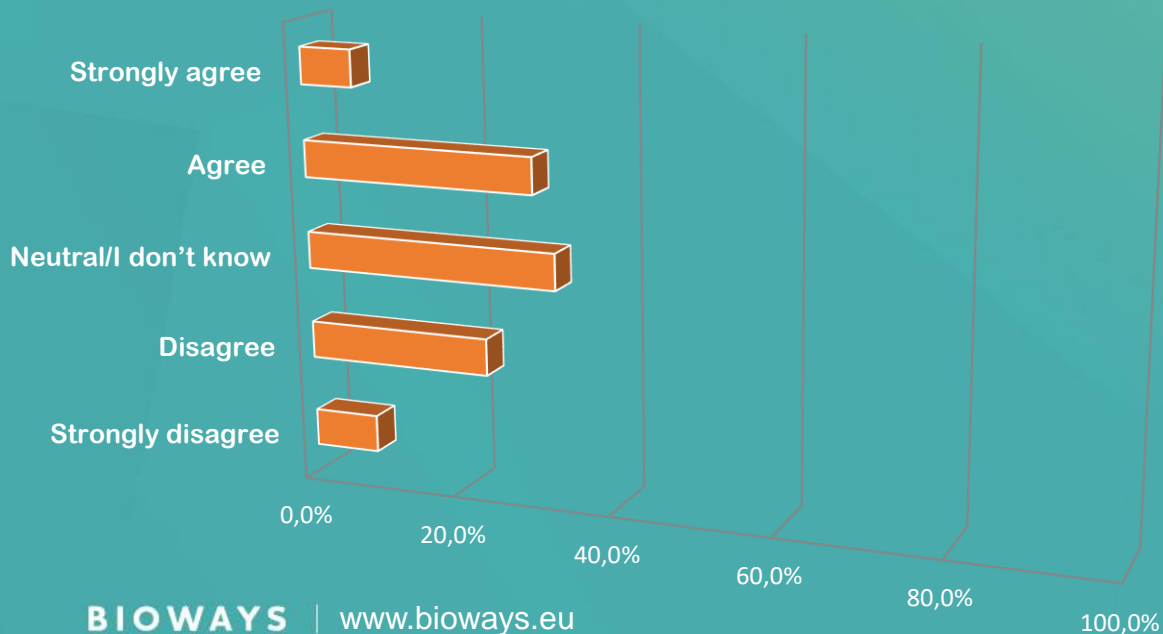
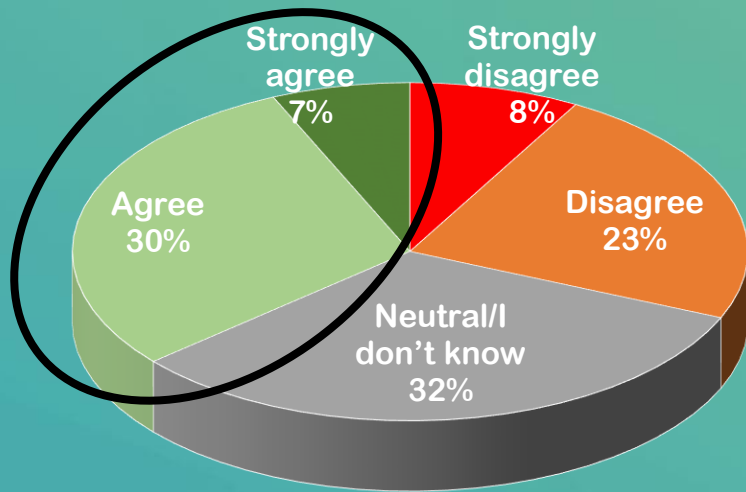


Barriers, challenges and opportunities for the European bioeconomy- The BIOVoices project.

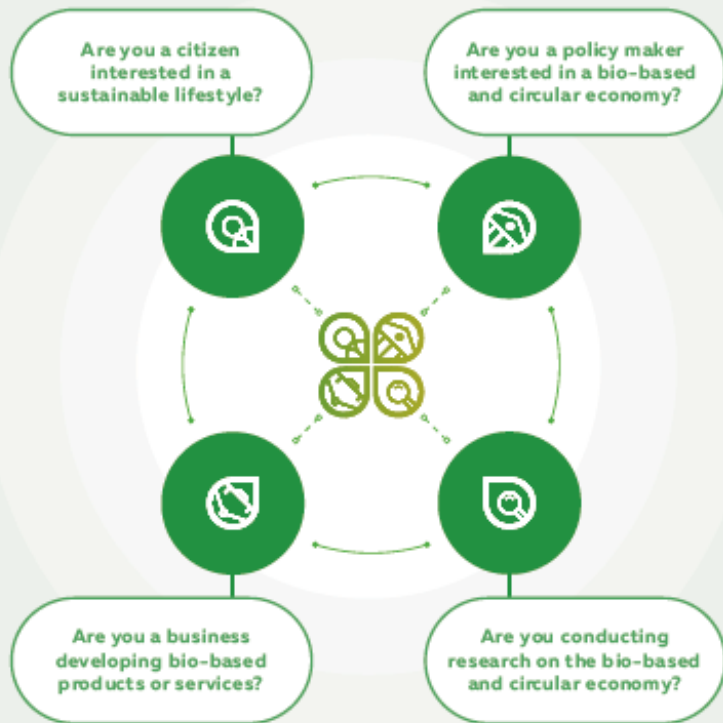
Evangelia Tsagaraki, Q-PLAN INTERNATIONAL
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I have sufficient KNOWLEDGE of bio-based products



Don't have sufficient knowledge
of bio-based products



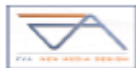


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This Project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 774351



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BIOVOICES

CONNECTING BIO-BASED FORCES
FOR A SUSTAINABLE WORLD

BIOVOICES Objectives and Action Plan



**Creation of a MML
(Mobilisation and
Mutual Learning)
platform**



**Support and
animate the
co-creation among
stakeholders**



**Develop an action
plan to raise
citizen's awareness
on BBP**

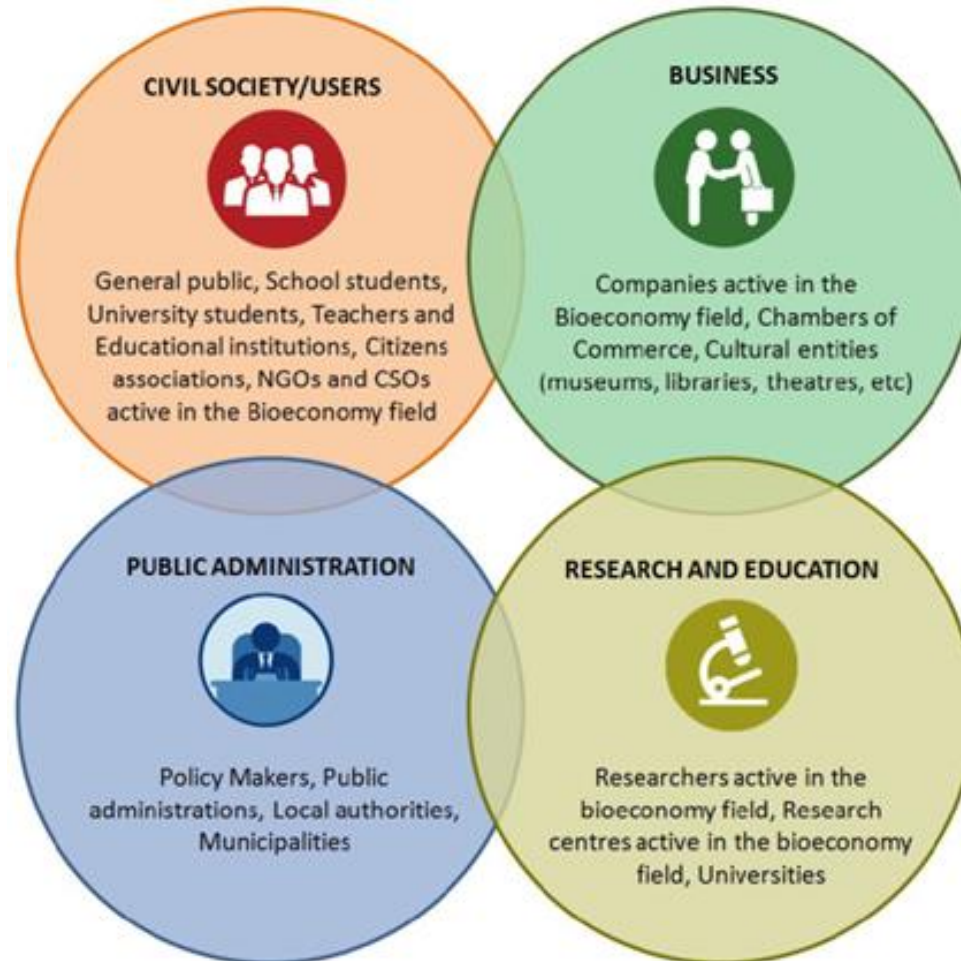


**Design strategies to
address large public**



**Develop
stakeholders-oriented
actionable knowledge**

The Quadruple Helix Model



The BBP market development phases

- ❖ **Business case:** A commercial application has been realized and it is mainly characterized by the entrepreneurial activity and research development
- ❖ **Go-to-market:** The first competitive bio-based products are sold in the market, new companies join the value chain, the infrastructure (business incubators, training centre etc.) is established, and the products are able to attract both private and public funding.
- ❖ **Acceleration:** The value chain is able to produce competitive bio-based products at an extensive scale and can count on an increasing demand.

The BBP market uptake challenges

- **MARKET DEVELOPMENT:** deals with the creation of markets by businesses that produce bio-based products
- **AWARENESS AND TRUST BUILDING:** concerns the building of awareness and trust with users by improved communication
- **SUPPORTING STRATEGIES AND STANDARDS:** concerns the development of European and national supporting strategies (incentives), regulatory frameworks, legislation and standards to stimulate the production and use of bio-based products
- **SUPPORTING ENVIRONMENT:** relates to the **environment required to improve the production** of resources, such as more 2G feedstock and intermediaries to stimulate the production and use of bio-based products
- **REGIONAL AND LOCAL DEVELOPMENT:** relates to **regional/local action plans** and activities designed to stimulate the production and use of bio-based products

Clusters	Development phase		
	<u>Business case</u> Product is 95% mature and becomes a business case	<u>Go-to-market</u> Mature product and early market penetration	<u>Market acceleration</u> Market increases and new user groups are reached
A: Market development	A1 FIND FIRST CUSTOMERS	A2 SPECIFY UNIQUE SELLING POINTS (USP)	A3 UP-SCALING
B: Awareness & trust building		B2 CHANGES IN PURCHASE HABITS	B3 INCREASE THE ADOPTION
C: Supporting strategies & standards		C2 INTRODUCE EU & NATIONAL INCENTIVES	C3 REALISE STANDARDISATION
D: Supporting environment	D1 IMPROVE THE ECOSYSTEM TO ENHANCE BUSINESS CASES	D2 B2B USERS AS FRONTRUNNERS	D3 INCREASE SUSTAINABLE 2G FEED-STOCK FOR BB PRODUCTS
E: Regional/Local development	E1 ENHANCE LOCAL BIOECONOMY STRATEGIES & ACTION PLANS	E2 BOOST LOCAL DEPLOYMENT	

Cluster A: Market development

Cluster A: Market development	Development phases		
	<u>Business case</u> Product is 95% mature and becomes a business case	<u>Go-to-market</u> Mature product and early market penetration	<u>Market acceleration</u> Market increases and new user groups are reached
Challenges	A1: FIND FIRST CUSTOMERS	A2: SPECIFY UNIQUE SELLING POINTS (USP)	A3: UP-SCALING
Main questions identified	<ul style="list-style-type: none"> How to increase BBP ability to meet user's expectations and to select identified markets? How to organise extended warranty, service contracts and take-back options? How to increase the role of policy makers to boost the BBP market? 	<ul style="list-style-type: none"> Which features of BBP solve problems or add value? Which USP perceive stakeholders as valuable per application sector? Which BBP have better life-cycle analysis and end-of-life options compared to FBP rivals? 	<ul style="list-style-type: none"> How to scale up (transition pathways)? How to respond better to the circular economy providing more cascading value? How to develop more BBP markets through hybrids versus 100% E (scenario's)?

Cluster B: Awareness and trust building

Cluster B - Awareness and trust building	Development phases		
	<u>Business case</u> Product is 95% mature and becomes a business case	<u>Go-to-market</u> Mature product and early market penetration	<u>Market acceleration</u> Market increases and new user groups are reached
Challenges	-	B2: PROMOTE CHANGES IN PURCHASE HABITS	B3: INCREASE THE ADOPTION
Main questions identified by BIOVOICES analysis		<ul style="list-style-type: none"> • What are the positive and negative connotations about BBP? • In which cases is a premium price allowed and which clarified benefits are important? • What are successful awareness raising concepts and info-educational stories? 	<ul style="list-style-type: none"> • Which media campaigns to include BBP in daily life (key messages, success stories)? • What do brand owners and NGOs require to enhance adoption? • Which arguments contribute to force the adoption of BBP?

Cluster C: Supporting strategies and standards

Cluster C: Supporting strategies and standards	Development phases		
	<u>Business case</u> Product is 95% mature and becomes a business case	<u>Go-to-market</u> Mature product and early market penetration	<u>Market acceleration</u> Market increases and new use groups are reached
Challenges	- -	C2: INTRODUCE EU & NATIONAL INCENTIVES	C3: REALISE STANDARDISATIO
Main questions identified by BIOVOICES analysis		<ul style="list-style-type: none"> Which incentive policies have proven effective for BBP? i.e. work in different national contexts? How to improve Green Public Procurement in order to become more effective? 	<ul style="list-style-type: none"> Which strategic commitments (SDGs) to a long transition are implemented? What are the Pros and Cons of increasing the % of bio-based materials in products

Cluster D: Supporting environment

Cluster D: Supporting environment	Development phases		
	<u>Business case</u> Product is 95% mature and becomes a business case	<u>Go-to-market</u> Mature product and early market penetration	<u>Market acceleration</u> Market increases and new user groups are reached
Challenges	D1: IMPROVE RESOURCES TO ENHANCE BUSINESS CASES	D2: B2B USERS AS FRONTRUNNERS	D3: INCREASE SUSTAINABLE FEEDSTOCK FOR BB PRODUCTS
Main questions identified by BIOVOICES analysis	<ul style="list-style-type: none"> How to create a sense of urgency for BBP business cases through new user patterns and agricultural practises? How to improve infrastructures? 	<ul style="list-style-type: none"> What are good channels to communicate sustainable BBP? How to increase the connections among brand owners and BBP? 	<ul style="list-style-type: none"> When to use 2G instead of 1G for identified BBP? How improve legislation and incentives to consider waste a resource? How to achieve a fair competition between biofuels and other BBP?

Cluster E: Regional/ Local development

Cluster E: Regional/Local development	Development phases		
	<u>Business case</u> Product is 95% mature and becomes a business case	<u>Go-to-market</u> Mature product and early market penetration	<u>Market acceleration</u> Market increases new user groups reached
Challenges	E1: ENHANCE LOCAL BIOECONOMY ACTION PLANS	E2: BOOST LOCAL DEPLOYMENT	
Main questions identified by BIOVOICES analysis	<ul style="list-style-type: none"> Which BBP business cases and its feedstock are relevant to implement? How to develop local cooperation to improve business cases? How to create a local action plan to assess opportunities and challenges? 	<ul style="list-style-type: none"> How can local economies contribute successfully to the market uptake of BBP? How to maintain the territory sustainability (soil, water etc.) through BB feedstock for new markets? How to exploit territorial value chains for new BBP? 	

Thank you!

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