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BIOVOICES

CONNECTING BIO-BASED FORCES FOR A SUSTAINABLE WORLD

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CONNECTING BIO-BASED FORCES FOR A SUSTAINABLE WORLD

This Project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 774331

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DELIVERABLE 4.3

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ACRONYMS

BBP	Bio-Based Product
FBP	Fossil-Based Products
SDG	Sustainable Development Goals[1]
LCA	Life Cycle Assessment
MML	Mobilisation and Mutual Learning
1G, 2G, 3G	First Generation, Second Generation, Third Generation
CSO	Civil Society Organisation
NGO	Non-Governmental Organisation
B2B	Business to Business (as user)
BBI	Bio-Based Industries
TRL	Technological Readiness Level

[1] http://www.undp.org/content/undp/en/home/sustainable-development-goals.html

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1. INTRODUCTION

1.1 RATIONALE

The implementation of bio-based solutions and related value chains depends heavily on the market acceptance of such products and the development of a sustainable feedstock supply. A recent pan-European study under the BIOWAYS EU-funded project revealed that even though consumers have a positive perception of bio-based products (BBP), they have little awareness and knowledge about them. In order to target research in BBP science, technology and innovation and to meet the views and expectations of society towards the market uptake of BBP, a broad, inclusive assessment of the challenges and opportunities at hand is necessary. Furthermore, multi-actor approaches are needed to identify and address both the risks as well as the different stakeholders' interests and aspirations and to eventually maximise the benefits of new bio-based business models within society.

In this context, BIOVOICES aims to ensure the engagement of all relevant stakeholder groups to tackle bio-based related challenges to enhance the market uptake, by animating open dialogue through a Mobilisation and Mutual Learning (MML) approach. 70 MML events will be organised at Regional, National and European level to support proactive collaboration among businesses, citizens and customers, policy makers and researchers, to address the most relevant challenges in order to boost the bio-based economy overall and specifically BBP market uptake.

1.2 WHAT IS THE BIOVOICES FOCUS GROUP?

The BIOVOICES Focus Group constitutes a **community of (external to the project's consortium) multi-disciplinary experts in the knowledge fields of the bioeconomy and the BBP sectors, representing consumers/general public, business community, research community, policy and public administration.** Members of the Focus Group participated in the **BIOVOICES Focus Group workshop** organised on **November 13th and 14th, 2018 in Rome**, **Italy** with the aim of:

- Validating and improving the challenges, barriers and opportunities for the development of bio-based value based on stakeholders' interests and expected benefits as identified by the BIOVOICES consortium under Work Package 3 which set up the contextual framework of the project MML activities;
- Testing and validating the BIOVOICES MML approach, before applying it to national, regional and European events, and
- Providing best practices, lessons learnt, knowledge and advice related to the uptake of bio-based products for the evolution of the bioeconomy.

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1.3 THE AIM OF THIS DELIVERABLE

The overall aim of D4.3 is to record and **present the results of the Focus Group Workshop,** held on **13 and 14 November 2018** in **Rome, Italy** regarding:

- The updated set of challenges and key questions to be addressed in BIOVOICES MML events (*note that : the initially identified challenges and key questions can be found at Deliverable 3.3 BIOVOICES, Mapping bio-based challenges, http://www.biovoices.eu/results/public-results*); and
- recording and collating ideas, stemming from the Focus Group workshop insights, relating to the organisation and design of the BIOVOICES MMLs to be held in 11 European countries (10 partner countries + Belgium) at local, regional, national and European levels during 2019 and 2020.

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2. METHODOLOGY OF BIOVOICES ANALYSIS

2.1 CHALLENGES FOR THE MARKET UPTAKE OF BIO-BASED PRODUCTS

The use of renewable natural resources for bio-based products (BBP) such as for packaging and furniture is proceeding slowly. Although a larger market size of BBP would contribute to a more sustainable society, the transition towards a European bio-based economy requires more attention. BIOVOICES has identified twelve challenges to contribute to increasing the market uptake of bio-based applications.

Many policy concepts concerning the bio-based economy occur repeatedly in 'vision' papers without addressing the reasons why market introduction is faltering. Currently, there is only a limited number of business cases for BBP that can compete effectively with their fossil-based rivals. Contributing factors to this situation are that entrepreneurs are often too optimistic at the prototype stage of producing a BBP; civil society would now like to know the end-of-life options of BBP which may currently be unclear, and start-ups coming out of the world of research and development are focused on the lower range of Technological Readiness Levels (TRLs 1-6). To compete effectively, greater attention needs to be focused on the upper TRLs (7-9) in order to drive and deliver sustainable business models, adjustments to laws and regulation, training and education for potential users, and clear methods for upscaling. Greater attention to the requirements of achieving upper TRLs is necessary because without it many start-ups die off before a steady stream of revenue can be established.

BIOVOICES aims to contribute to the market uptake of bio-based applications with established upper TRLs, with reference to three development phases: 1. **Development** - business cases with 95% mature products, 2. **Take-off** - with mature products for niche groups, and 3. **Acceleration** - to mainstream groups. Based on a literature search (Overbeek & Hoes, 2018) and interviews (Diogo & Urze, 2018) BIOVOICES has identified five clusters (identified below) and twelve individual challenges that need to be addressed to enhance market uptake (Albertini et al., 2018):

1. **Market development** to produce BBP for niche markets and broader markets.
2. **Building awareness and trust** with interested business and consumers.
3. **Supporting European and national strategies** (incentives), regulatory frameworks, legislation and standards to stimulate the production and use of BBP.
4. **Developing a supporting environment** to improve second generation (2G) feedstock and more intermediaries to stimulate the production and use of BBP.
5. **Regional/local action plans and activities** to stimulate the production and use of BBP.

The most relevant application sectors identified were:

1. Cleaning, personal care and cosmetics, biomedical;
2. Textile products, clothing, sports and toys;
3. Food packaging, disposable products for catering;

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4. Biofuels and bioenergy;
5. Building, construction and restoration, paintings, decorations and furniture;
6. Nutraceuticals, environmental bioregulation and biological sensors.

Solving the challenges identified above requires cooperation between stakeholders from government, business, research and civil society - the “quadruple helix”. Establishing a quadruple helix is not an easy task, because it requires agreement on shared objectives and development of a common language amongst and between stakeholders. Usually, in the bio-based economy, research and business, supported by the government, (the triple helix) cooperate to realise technological development (TRL 1-6). To create social innovation and increase adoption for applications with TRL 7-9, a change is required from the triple helix to the quadruple helix (including civil society), the different perspectives of all these stakeholder groups must be considered. BIOVOICES will animate the collaboration between these stakeholder groups through MML events to be held during 2019 and 2020 (Hoes et al., 2018).

2.2 Stakeholders

Civil society organisations (CSOs), non-governmental organisations (NGOs) and citizens play an important role in creating pressure that can trigger value chains to change their practice. To safeguard the legitimacy of bio-based innovations vis-à-vis European citizens, the globally agreed Sustainable Development Goals (SDGs) have the potential to drive a louder and more persistent voice to demand and implement the bio-based economy. Most CSOs and NGOs appear to have a ‘watchful to critical’ stance towards the use of biomass for BBP (Meeusen et al., 2015). Corporate engagement has become an important issue for major NGOs/CSOs, which are actively working on issues related to BBP, bio-degradability and sustainability certificates during application take-off and acceleration phases.

Businesses that contribute to market uptake of as yet uncompetitive and unadopted bio-based applications may be potential adopters of innovations (Rogers, 2003). Potential adopters evaluate an innovation on its relative advantage in comparison with current tools or procedures. Its compatibility with the existing system, complexity or difficulty to understand, testability,potential for reinvention, and observed effects. Even with this high learning curve and high-risk profile, potential adopters might be willing to adopt the innovation. Businesses in the acceleration phase as early adopters are more discreet in their adoption choices. Business may reconsider their value creation and define the problems of their customers by addressing social values and cooperate with them to obtain a shared mission (PWC, 2017).

Policy makers are important players in enhancing or hampering an innovation. Governments could adjust their current legislation to stimulate the adoption of new and emerging products. They can also create markets by introducing a more favourable taxation regime or provide incentives for BBP, compared to fossil-based rivals, in particular in the take-off innovation phase when the dominant bio-based designs become clear. Another important role of policy makers and investors is to stop innovations with too little potential through a reduction in the financial investments and incentives available.

The research communities contribute to technological development, conduct feasibility studies, and contribute to conferences, workshops and knowledge exchange events. Besides undertaking research, universities and schools also have an important task in the education of students as potential developers of new BBP and in informing citizens about new circular bio-based perspectives.

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2.3 LIST OF IDENTIFIED CHALLENGES

To identify shared challenges across the quadruple helix, it is important to distinguish the phases in innovation systems in which all helix actors are interested and to which they can contribute effectively (Hekkert et al., 2011). During the ***Development*** phase, which can result in accepted business cases, the policy and socio-economic landscape for the establishment and operation of the bio-based economy are created. The phase of ***Take-off*** shows substantial growth: the first competitive bio-based products are sold in the market to niche groups, new companies join the value chain, and the infrastructure is established with both public and private funding. This phase ends with a fast market growth. In the phase of ***Acceleration***, competitive bio-based products are produced at an extensive scale and can count on increasing demand. This phase ends with market saturation. Based on the clusters and the development phases, BIOVOICES has framed a 'menu' of twelve challenges for market uptake, as shown in Table 1 below.

Clusters	**Development phase**		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** 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	

Table 1: Overall challenges for market uptake of bio-based products

Once the twelve challenges had been identified, BIOVOICES partners considered the elements that should be taken into consideration for the design of the planned MML workshops to create favourable conditions for the market uptake of BBP and developed a set of key questions for each challenge as presented in Section 4.

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3. Structure of the Focus Group Workshop

3.1 The BIOVOICES Focus Group Synthesis

The BIOVOICES Focus Group was composed of **62 multi-disciplinary experts** in the knowledge fields of the bioeconomy and BBP, from organisations such as:

- Advisory bodies
- Executive government and administration as well as legislative bodies
- Civil Society organisations (CSOs), Non- Governmental Organisations (NGOs), and consumer associations,
- Academic and educational institutions
- Research centers, cooperative research networks and knowledge transfer organisations
- Collaboration projects and initiatives at both national and European level
- Bio-based enterprises and clusters

To populate the Focus Group, a short list of more than 70 potential participants was prepared by the consortium, based on partner's personal networks, BIOVOICES and BIOWAYS project interviewees, EUBioNet project representatives and Advisory Board members. Based on this preliminary short list a first call of experts was conducted in July 2018. The list was enriched in August and September 2018 with other contacts made at various events that BIOVOICES partners either organised or participated in (e.g. the Maker Faire 2018 - October 2018, Rome, IT, the International Forum on Industrial Biotechnology and Bioeconomy 2018, September 2018, Torino, IT). The Focus Group synthesis was finalised in November 2018, as shown in ANNEX 1.

During the whole process of populating the Focus Group, efforts were made to maintain a balanced mix of experts in terms of both stakeholder groups and geographical representation. However, as it can be concluded from Table 2 below, it proved difficult to reach civil society and policy makers and these two stakeholder groups of the 4-helix were underrepresented in comparison to the research and business community.

Representation of the 4 helix actors at the Focus Group synthesis	
Business/ industry	25
Civil society organisation	6
Public body	9
Research/ academic	20
Business/ industry + Civil society organization	2
TOTAL	**62**

Table 2: 4- helix actors' representation at the Focus Group synthesis

An important representation of EuBioNet projects was also achieved, with representatives from 17 projects participating at the Focus Group Workshop as shown in Table 3 below. The EUBioNet is a proactive alliance of EU funded projects dealing with bioeconomy and support, with participating organizations mainly from research and business community stakeholder groups.

EUBioNet projects represented in BIOVOICES Focus Group		
AlpBioEco	BIOREGIO	InnProBio
AgriMax	BioSTEP	ISABEL
BIOBRIDGES	BIOVOICES	RoadToBio
BioCannDo	BIOWAYS	Transition to Green Economy
BioHorizon	BLOOM	STAR-ProBio
BIOPEN	CommBeBiz	

Table 3: EUBioNet projects representation at BIOVOICES Focus Group

A complete list of the BIOVOICES Focus Group Experts is given in ANNEX 1.

3.2 Day 1- Tuesday, 13 November 2018

The first day of the BIOVOICES Focus Group workshop was devoted to validating, enriching or revising the challenges identified by BIOVOICES to date and exchanging ideas on how they could be better addressed during Mobilisation and Mutual Learning (MML) events, namely:

1. Which are the key discussion topics that better address each challenge? and
2. In which application sector(s) is each challenge more evident?

Following an overview of the updated European Bioeconomy Strategy, the morning plenary session was devoted to explaining to participants the scope and structure of the workshop and to preparing the next "working in teams" session by introducing the identified challenges affecting the market uptake of bio-based products. During this introductory presentation, participants were asked to share their opinion as to which challenges are most relevant for each development phase and what are their main expectations from the BIOVOICES MML events, using the interactive real-time voting tool Mentimeter. The results of this feedback exercise are presented in Section 4.

At the "working in teams" session, four teams (tables) were formed by mixing participants from different backgrounds (i.e. different type of stakeholders) and geographical areas, representing different bioeconomy maturity levels and interests. The detailed synthesis of each table can be found in ANNEX 1.

Three of the five clusters of challenges were addressed by each table in a session of 60 min per cluster (total 180 min). The challenges grouped under Cluster C ("Introduce EU & national incentives" and "Realise standardization") were not directly addressed at the discussion tables due to their transversal and cross-cutting nature.

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In each session, an A0 size poster with the related challenges was at the table to give participants the opportunity to 'post' their comments/ proposed discussion topics. Participants were provided with colored sticky papers representing each stakeholder group (e.g. blue for researchers), as shown in Figure 1. The discussions were supported by a moderator and a rapporteur of the BIOVOICES team.

Figure 1: Poster used for the "work in teams" sessions of BIOVOICES Focus Group Workshop

The aggregate results of the discussions were outlined by the respective moderators at the final plenary session, at the end of Day 1.

3.3 Day 2- Wednesday, 14 November 2018

The second day was devoted to discussing the organisation of MML events to address the identified challenges, namely:

1. At which level (local/regional, national or European) each challenge should be (better) addressed during an MML event?
2. Who should be involved?
3. Are there any events already planned during the next year which should be targeted for the organisation of an MML event?

The day was structured in three plenary sessions, each one focusing on one development phase, where participants were asked to share their opinion as to which stakeholder group is the priority and which would be an appropriate MML level (local/ regional, national, European), for each development phase. Questions were answered using the interactive real-time voting tool Mentimeter. Examples of MML events that BIOVOICES partners plan to run in several EU countries for several development phases were pitched and discussed. Finally, the participants were asked to propose ideas for the organisation of an MML event by using a dedicated word template (see ANNEX (providing information such as country, application sector, challenge, key questions, level audience etc.) and/or by "posting" an MML idea (application sector and country) on a specific challenge presented on an A0 size poster which listed the development phase/cluster and related challenges.

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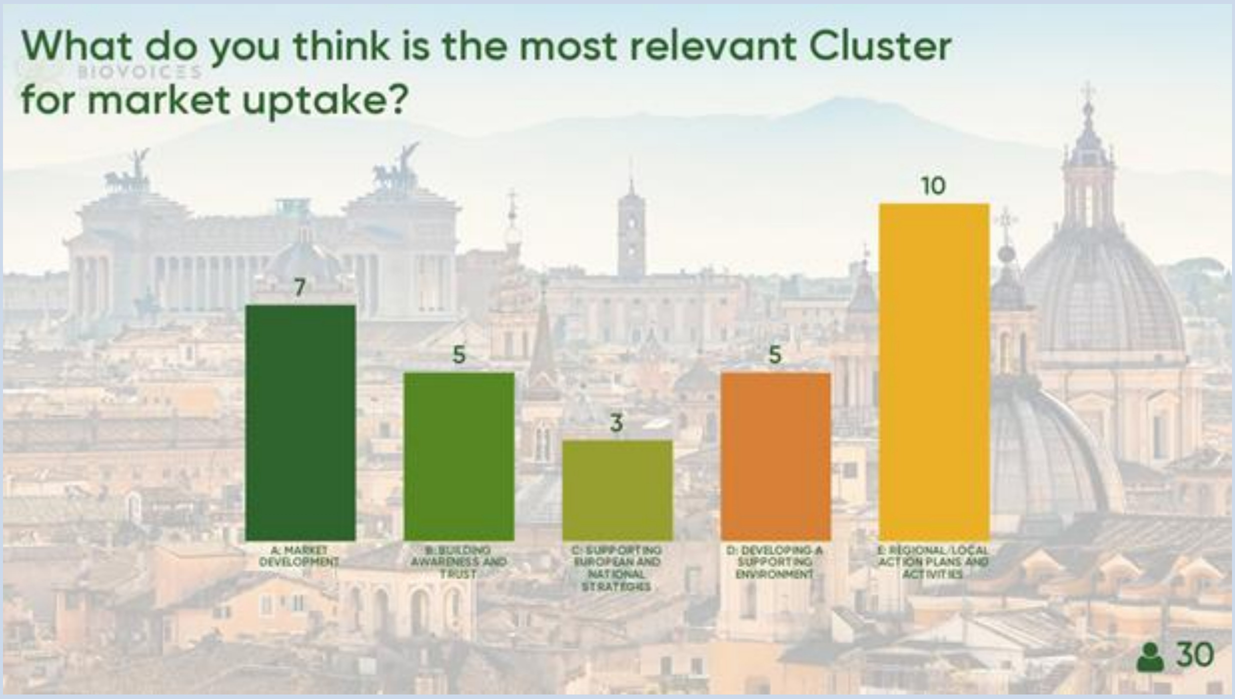
4. Overview of the discussions

4.1 Day 1 – morning plenary session - Validation of identified bioeconomy challenges and expected outcomes of BIOVOICES MML events

In the introductory plenary session of the BIOVOICES Focus Group workshop and with the aim to prepare the ground for the detailed discussions of the working in teams next session, participants were asked to share some general views/ perceptions on bioeconomy challenges and on possible expected outcomes from BIOVOICES events with the use of the online Mentimeter tool. The questions asked, and the answers obtained are summarised in Table 4 below:

Validation of identified bioeconomy challenges and expected outcomes of BIOVOICES MML events
Q1 - Which of the identified clusters of challenges do you think is the most relevant for the market uptake of bio-based products?


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Validation of identified bioeconomy challenges and expected outcomes of BIOVOICES MML events
Q2 - Which challenge is the most relevant for **Cluster A (Market Development)**?

Q3 - Which challenge is the most relevant for **Cluster B (Awareness and trust building)**?


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Validation of identified bioeconomy challenges and expected outcomes of BIOVOICES MML events
Q4 - Which challenge is the most relevant for **Cluster C (Supporting strategies and standards)**?

Q5 - Which challenge is the most relevant for **Cluster D (Supporting environment)**?


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Validation of identified bioeconomy challenges and expected outcomes of BIOVOICES MML events
Q6 - Which challenge is the most relevant for **Cluster E (Regional/ Local development)**?

What do you expect to be the main outcomes (3 keywords) from BIOVOICES MMLs?

Table 4: Validation of identified bioeconomy challenges and expected outcomes of BIOVOICES MML events (Mentimeter tool)

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4.2 Day 1 – Working in teams session - Key questions to be addressed for challenges under each Cluster

4.2.1 Cluster A - Market development

General comments made by participants during working in teams' sessions

- The definition of USP should be identified at the initial phase of the development of a BBP business case and not during later development phases, focusing on end-users needs and on specific application sectors.
- Differentiation should be made between 'drop-in' BBP that provide an alternative to already existing fossil-based products versus innovative BBP.
- New business models and value chains are required for BBP to fit within the existing agricultural industry, as they differ from the fossil-based value chains in fundamental characteristics such as organisation level, feedstock seasonality and availability, number of feedstock providers etc.

Cluster A: Market development	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
Challenges	A1: FIND FIRST CUSTOMERS	A2: SPECIFY UNIQUE SELLING POINTS (USP)[2]	A3: UP-SCALING
Application sectors	Packaging, Building.	Textile, Packaging, Building.	Cleaning and hygiene, Packaging, Building.
Main questions identified by BIOVOICES analysis	• 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?	• 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?	• How to scale up (transition pathways)? • How to respond better to the circular economy by providing more cascading value? • How to develop more BBP markets through hybrids versus 100% BB (scenario's)?
Additional questions developed during the Focus Group Workshop	• Which are the actual consumer needs that a new BBP business case should address?	• Which is the driving force for customers to prefer BBP from? • How to differentiate go-to-market strategies for	• Which is the weakest link to the process of upscaling BBP (feedstock, technological processes/ infrastructure, expertise, resilience/ robustness)?

[2] As previously mentioned, Focus Group participants agreed that the discussion on USP should be a key part of the first development phase of building a new BBP business case

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Cluster A: Market development	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
	• How can new BBP business cases answer the current needs of the consumers? • What do consumers expect from BBP in terms of functionality? • Which new business models are required for BBP business cases? • How to ensure the economic sustainability of BBP business cases in the long-term future? • Which incentives could be provided by the public sector to boost BBP market? • Which existing (or new) measures could be used in order to find first customers for BBP business cases? • Assessment of societal and environmental sustainability and benefits of BBP business cases • LCA assessment and ecological footprint of new BBP business cases • Who are the early adopters of BBP?	drop-in versus new, innovative BBP? • What are the most important issues to change consumer habits? • Which is the competition landscape? What is the rest of the world doing? • Which are the competitive advantages of BBP business cases per application sector in terms of market/economy rules? • Which is the cost of not deploying BBP?	• Which are the supply chain gaps that should be addressed for BBP upscaling per application sector? • How to guarantee feedstock availability for upscaling? • Which are the gaps in terms of technological infrastructure for BBP upscaling? • Which are the gaps of the agricultural industry in terms of supporting BBP upscaling? • How to assess the right production scale in terms of economic sustainability? • Funding/ risk management mechanisms for BBP upscaling • How BBP upscaling affects local society? • How EU standards and legislation affect BBP upscaling? • Which land use or waste use issues arise with BBP upscaling?

Table 5: Key questions for challenges of ***CLUSTER A: MARKET DEVELOPMENT***

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4.2.2 Cluster B - Awareness and trust building

General comments made by participants during working in teams' sessions

- BBP awareness and promotion communication strategies should be tailor-made, based on country, application sector and target group. In this context, it was suggested not to address the entire 4-Helix at once.
- Promoted USP should focus on addressing consumer needs and the performance of BBP. Sustainability alone was not considered a strong enough USP to promote changes in purchase habits.
- The importance of conveying real-life examples of BBP and allow possible end-users to experience them was stressed by all participants in communicating the benefits of BBP and create awareness and trust building.
- Building trust was considered to be a very important theme by Focus Group Workshop participants. In order to build trust among consumers a two-fold strategy was suggested: on the one hand having Ambassadors (big brands and influencers), experts promoting products within their sector (e.g experts promoting biofuels). On the other hand, 'watchdog' organisations such as (NGOs, CSOs, universities) will help check the reality of "numbers" and statements and support local level dissemination.
- Consider BBP and the bioeconomy under the umbrella of circularity (circular economy) for promotion reasons, as it is a concept that is easier to understand.

Cluster B - Awareness and trust building	Development phases		
	Business case Product is 95% mature and becomes a business case	Go-to-market Mature product and early market penetration	Market acceleration Market increases and new user groups are reached
Challenges	-	**B2: PROMOTE CHANGES IN PURCHASE HABITS**	**B3: INCREASE THE ADOPTION**
Application sectors	-	Packaging, Building.	Cleaning and hygiene, Packaging.
Main questions identified by BIOVOICES analysis		• 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?	• 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?

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Cluster B - Awareness and trust building	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
Additional questions developed during the Focus Group Workshop		• Which are the factors/stakeholders that promote purchasing habits for BBP? • Which are the targeted audiences and which communication channels do they use? • Which are the success factors of a promotion campaign for BBP per country, application sector, target group? • How to communicate necessity and responsibility for changing purchasing habits for BBP favour? • How the bioeconomy can be promoted as a part of a solution to key global challenges of our time? • Which is the appropriate BBP sector to start promoting consumer habits regarding BBP? • Which are the key messages to be conveyed to change purchase habits in favour of BBP' ? • How crucial is the price of BBP in changing consumers purchasing habits? • Which are the arguments/ considerations to pay for a price premium for a BBP that offers social and environmental benefits?	• How can real life examples and pilot cases of BBP be more effectively communicated? • What kind of tools/ evidence is useful to support early adopters to increase trust in BBP (scientific information, statistics, etc.)? • How to create a sustainability brand? • To which parts should a bioeconomy/ BBP promotion campaign differentiate from a promotion campaign for FBP? • What should public authorities do to convince stakeholders in building trust on BBP? • How to fund/ economically support BBP promotion campaigns?

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Cluster B - Awareness and trust building	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
		• How to mobilise and raise awareness on the whole value chain (from suppliers to consumers) on BBP? • How to create target-group oriented promotion campaigns for BBP (consumers, suppliers, businesses)? • Which is the role of schools in promoting awareness about BBP? • How does labelling affect the awareness about BBP?	

*Table 6: Key questions for challenges of **Cluster B - Awareness and trust building***

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4.2.3 Cluster C - Supporting strategies and standards

As can be seen from the workshop agenda, there were no dedicated sessions for the challenges of "introducing EU/national incentives" and "realising standardisation" (Cluster C), as it applies horizontally to all other identified challenges clusters. Therefore, the relevant questions identified were addressed in all tables within the framework of the respective discussions of each session.

Cluster C: Supporting strategies and standards	Development phases		
	Business case Product is 95% mature and becomes a business case	Go-to-market Mature product and early market penetration	Market acceleration Market increases and new user groups are reached
Challenges	- -	**C2: INTRODUCE EU & NATIONAL INCENTIVES**	**C3: REALISE STANDARDISATION**
Application sectors	-	All sectors	All sectors
Main questions identified by BIOVOICES analysis		• 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?	• 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?
Additional questions developed during the Focus Group Workshop		• How does labelling affect the awareness about BBP?	• How EU standards and legislation affect BBP upscaling? • What is the role of waste legislation framework in increasing feedstock for BBP?

Table 7: Key questions for challenges of ***Cluster C - Supporting strategies & standards***

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4.2.4 Cluster D - Supporting environment

General comments made by participants during working in teams sessions

- Clear definitions should be used for sustainability (environmental, economic, social) and sustainable feedstock for BBP.
- It was proposed to change the wording "1st generation" and "2nd generation" to "raw material" and "recycled material".

Cluster D: Supporting environment	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** 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**
Application sectors	Textile, Packaging, Biofuels, Building.	Cleaning and hygiene, Packaging, Building.	Textile, Packaging, Building, Biofuels.
Main questions identified by BIOVOICES analysis	• How to create a sense of urgency for BBP business cases through new user patterns and agricultural practises? • How to improve infrastructures?	• What are good channels to communicate sustainable BBP? • How to increase the connections among brand owners and BBP?	• 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?
Additional questions developed during the Focus Group Workshop	• How to share the needs of different actors and create win-win solutions for BBP business cases? • How are legislative framework, financial instruments and research results interconnected in BBP business cases and how can these synergies be improved in favour of BBP adoption?	• Which is the role of associations/ clusters and other intermediaries to increase the connections between feedstock producers, researchers and businesses for BBP? • How the consumers demand for BBP affects B2B cooperation to the adoption of BBP? • Which is the role of public organisations as B2B frontrunners?	• What is the role of waste legislation framework in increasing feedstock for BBP? • How to develop socially acceptable feedstock supply chains for BBP? • How to improve funding incentives to increase environmentally sustainable feedstock availability?

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Cluster D: Supporting environment	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
	• How to improve the BBP pre-industrial level innovation? • Which is the role of local clusters/ networks and innovation brokers in enhancing BBP business cases? • How to ensure low cost LCA for BBP business cases? • How to attract investors in BBP business cases?	• Which is the role of public procurement in B2B adoption of BBP?	• Which are the main barriers for feedstock availability? • What are the crucial success links in using “waste” as BBP feedstock? • What are the sustainability criteria that should be applied to BBP? • How to organise new value chains for environmentally sustainable feedstock involving farmers in decision making process?

Table 8: Key questions for challenges of ***Cluster D - Supporting environment***

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4.2.5 Cluster E - Regional/Local development

General comments made by participants during working in teams sessions

- During the "working in teams" sessions, it was proved that it was not easy to separate key questions and participant intervention per development phase.
- Funding sources are very fragmented. Uniformity of regional and national funding is essential (not only European! But also national and regional). Also integrating them at EU, national and regional level. Finally, more awareness and skills are needed to access the available funding sources at regional/ national level.
- Mapping of local resources is essential for a local bioeconomy to be developed. Mapping of resources needs to be the first step – after which the development of local business models can follow.
- Together with the resources it is important to focus on specific local problems to be addressed, mobilising the resources at regional level with region-specific action plans

Cluster E: Regional/Local development	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
Challenges	**E1: ENHANCE LOCAL BIOECONOMY ACTION PLANS**	**E2: BOOST LOCAL DEPLOYMENT**	
Application sectors	In regions with feedstock and BBP business cases (RIS3oti).	In regions with feedstock and BBP in mature sectors, e.g. Packaging and Building.	
Main questions identified by BIOVOICES analysis	• 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?	• 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?	
Additional questions developed during the Focus Group Workshop	• How to overcome funding sources fragmentation and diversity at European, national and regional level? • How to involve banks and investors into funding for bioeconomy?	• How to implement a cross-sectorial approach to bioeconomy? • How to encourage public/private regional and flexible financial incentives?	

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Cluster E: Regional/Local development	Development phases		
	Business case Product is 95% mature and becomes a business case	**Go-to-market** Mature product and early market penetration	**Market acceleration** Market increases and new user groups are reached
	• How to increase awareness and learning to leverage the available funding sources at regional/ national level? • How to increase awareness and involvement in bioeconomy projects of local and regional authorities? • How to coordinate national bioeconomy strategies on the local level? How to go from a strategy to an action plan at all levels (European, national, regional) • How to enable a bottom-up approach of local level needs and integrate them in bioeconomy action plans? • What is the importance of mapping regional bioeconomy resources and gaps? • How can local business sectors (i.e. tourism, forestry etc) be connected to the bioeconomy? • How to connect bioeconomy to different agendas i.e. health and safety, climate change, unemployment etc.?	• How to exchange best practices from region to region? • How can farmers be included? • How to follow a bottom-up approach for bioeconomy local development? • Which is the local/regional priority for bioeconomy deployment? • Who are the multipliers at local/ regional level and how to engage them? • What do regional actors expect in terms of support and funding and how do local stakeholders see collaboration with large industries? • How to link the implementation of an action plan to different funding sources?	

*Table 9: Key questions for challenges of **Cluster E - Regional/Local development***

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4.3 DAY 2 - ORGANISATION OF MML EVENTS

In the introductory plenary session of the second day of the BIOVOICES Focus Group Workshop, participants were asked to share their views on to which stakeholder group (policy, research, industry, civil society) should be the priority of BIOVOICES MML events and to which level (local/ regional, national or European) should the events be addressed, per business development phase. The questions asked, and the answers obtained are summarised in the Table below:

Overview of BIOVOICES Focus Group Event discussion on BIOVOICES MML events target groups and organisation levels
Q1 - Which is the most important development phase?


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Overview of BIOVOICES Focus Group Event discussion on BIOVOICES MML events target groups and organisation levels
Q2 - Which stakeholder group is the priority for the **Business Case** phase?

Q3 - For the **Business case** phase which is the most appropriate level?


Overview of BIOVOICES Focus Group Event discussion on BIOVOICES MML events target groups and organisation levels
Q4 - Which stakeholder group is the priority for the **Go to market** phase?

Q5 - For the **Go to market** phase which is the most appropriate level?


Overview of BIOVOICES Focus Group Event discussion on BIOVOICES MML events target groups and organisation levels
Q6 - Which stakeholder group is the priority for the **Market acceleration** phase?

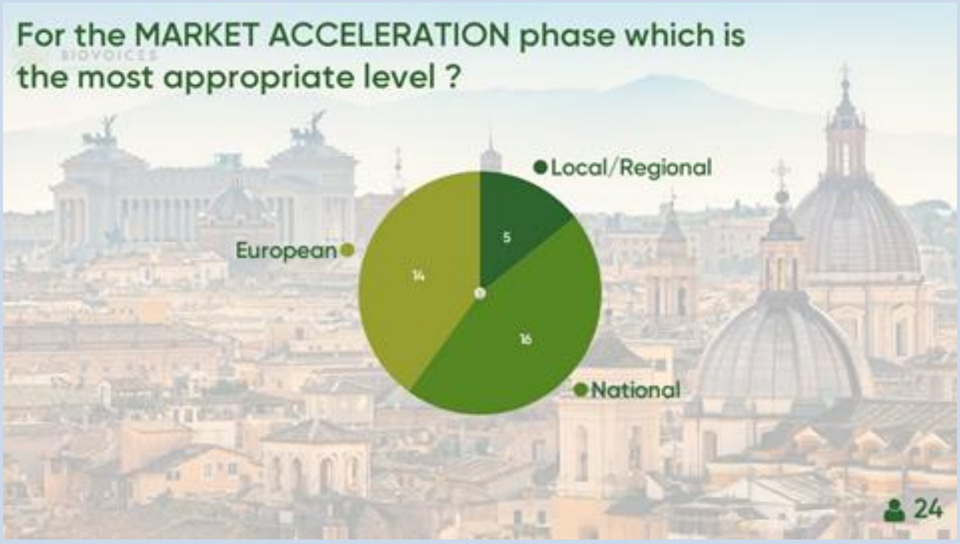
Q7 - For the **Market acceleration** phase, which is the most appropriate level?


Table 10: Overview of BIOVOICES Focus Group Event discussion on MML events target groups and organisation levels (Mentimeter tool)

Participants were also asked to propose MML ideas (per application sector and countries) on specific challenges, of those identified by BIOVOICES consortium as well as possible MMLS to be organized based on their personal networks and knowledge about relevant satellite events, initiatives etc. An overview of the results is presented in Tables 15 and 16 below:

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PROPOSED IDEAS ON MML ORGANISATION PER APPLICATION SECTOR, COUNTRY AND CHALLENGE BY BIOVOICES FOCUS GROUP PARTICIPANTS											
A1: Find first customers	**A2: Specify USP**	**A3: Up- scaling**	**B2: Promote changes in purchase habits**	**B3: Increase the adoption**	**C2: Introduce EU & National incentives**	**C3: Realise standardisation**	**D1: Improve resources to enhance business cases**	**D2: B2B users as frontrunners**	**D3: Increase sustainable feedstock for BBP**	**E1: Enhance local bioeconomy action plans**	**E2: Boost local deployment**
Romania: Industrial chemicals	**Romania:** Agro-food	**Italy:** plastics, cosmetics, neutraceuticals, biogas, biofuels	**Greece:** packaging, cleaning products	**Italy:** Hemp applications	**Ireland:** Agricultural biowaste uses	**Italy:** Food packaging			**Greece:** Aquaculture	**Greece:** Waste	**Estonia:** New feedstocks from agroforestry
UK: Industrial chemicals	**Germany**: Building and construction	**Romania:** Industrial chemicals		**Romania:** Construction, packaging	**UK:** Bioenergy	**UK:** Packaging				**Romania:** Neutraceuticals	**Romania**: agriculture, energy, cosmetics
NL: Textile	**NL:** Food packaging	**Italy:** Hemp applications		**Spain:** BBP from waste	**Estonia:** Food industry	**UK:** Pharmaceuticals				**Greece:** Biofuels/ bioenergy	**Germany:** packaging
NL: Road infrastructure/ construction	**Germany:** Packaging	**Sweden:** wood house building								**Slovakia:** Agro-food sector	**UK:** Algae from various products
NL: Fine chemicals		**Spain:** Packaging								**Portugal:** Packaging	
Greece: Bioenergy		**Italy:** Biolastics									
Germany: Packaging/ bioplastics											
Portugal: Biofuels											
Spain: Food packaging											
Slovakia: Agro-food sector, agroforestation											
Germany: Food waste											

Table 11: Proposed ideas on MML organisation per application sector, country and challenge by BIOVOICES Focus Group participants

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	IDEAS FOR ORGANIZING AN MML EVENT						
Name/ Organization	**Country**	**Key questions**	**Application sector**	**Main or side event**	**Target groups**	**Level audience (local, regional, national, European)**	**Expected outcomes**
FNR	Germany	Solutions that BBP can bring to a specific market/ sector/ application sector	Building, gardening/ forestry, packaging, biowaste collection, applications with a high risk of littering (biodegradable solutions)	Always better to organize side events, the questions need to be specific so that it can be sufficiently discussed in a short time	Need to be carefully selected, the challenge is to get the 4-helix actors together. Alternatively, you could organize two events on the same subject with different actors of the helix.	Depends on the subject	Identification of common needs/ consensus, hurdles/ opportunities, needs to take action etc.
Zuzana Okanikova	Slovakia	Do you know what bioeconomy is?	Agriculture	Side event	Civil society, business, research, policy	Local, regional	Networking
Prof. Dr. Constantinos Vorgias	Greece	Implications of bioeconomy strategy in South East Mediterranean Area	Education (high level) General public	Side event	Young people (master level), young entrepreneurs, politicians	Regional (South East Europe)	Public concerns Political stimulation Attract non-European countries
Electra Papadopoulou	Greece	What do you think bioeconomy is	Primary and secondary school education level	Side event at Bioeconomy Fair in Thessaloniki (Greece)- will be announced by the end of 2018	General public	Regional	How do young people perceive the concept of bioeconomy
IMS	UK	Which BBP do not have a good chance of being used? Why and what gaps are in the market? Which are the regulatory barriers?	Construction	Ecobuild- Maich (annual event in London)	Builders, architects, universities, government, planners, trade associations	Local, regional, national (some European)	Informed view of what bio construction products would be welcomed by the industry, why uptake is slow, what can be done to progress uptake
Eulogio Castro	Spain	What to do with olive oil residues? Would you accept olive oil packed in renewable items?	Agriculture, agroindustrial, food industry	Side event to EXPOLIVA (the biggest fair on olive oil production). Industrial equipment, market, testing of olive oil	Consumers, industry manufacturers, researchers	European (mainly Mediterranean countries)	Identification of relevant areas for BBP development in the food industry. Enhancement of social awareness
Katarina Blicklingova	Slovakia	How to promote the development of value chains?	All sectors	Side event e.g. AGROSHLON (International agricultural fair, March 2019), dedicated meeting of the members of the bioeconomy cluster (e.g. General Assembly)	Primary producers, SMEs	National	Development of new value chains, creation of value at all levels (including primary production), cross-sectoral cooperation, identification of barriers, improved cooperation, trust building
Dana Peskovicova	Slovakia	What is bioeconomy? (Inspiration), What kind of skills/ tools are necessary for implementation? Examples/ good practices	Agro-food sector Innovative companies in agro-food sector (farmers and related entrepreneurs)	Side event at AGROKOMPLEX NITRA- (Agricultural fair/ exhibition), FARMERS HOUSE organized by	Young people, children family, secondary school students, university students (agri and natural sciences)	Local/ Regional	Increase public awareness on bioeconomy, understand the content of bioeconomy solution, show the challenges for added value in primary

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	IDEAS FOR ORGANIZING AN MML EVENT						
				scientists from NPPC, AGROFILM FESTIVAL			sector (agro-food), research needs/ changes in education
Sarah Hickingbottom-BioVale	UK			Side event at BioVale events AgriMax project events	Farmers, public bodies, public, citizen bodies	Regional/ Local	Tell and bring on board farmers and local business plus engaged citizens, illustrate opportunities/ tell stories/ show products
Marieke Meeusen	NL			Side event at Biopark	Business/ Government	Regional	
Telmo Machado	Portugal	What is bioeconomy and why am I important for it	Farmers associations, regional centres for decision, municipalities (political and technical representatives)	Main	Feed and food production	Regional	Raising awareness about bioeconomy
Mario Bonaccorso	Italy		Packaging	Side event at IFIB	Food industry/ Consumers	European	More public awareness about bio-based packaging

Table 12: Proposed ideas on MML organisation from participants networks and knowledge

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5. Conclusions

This report presents the results of the **BIOVOICES Focus Group Workshop** that was held in Rome, on November 13th and 14th 2018 with the two-fold aim to **validate and improve** the identified challenges for the development of bio-based value chains based, that has been conducted by the consortium under Work Package 3 and to test the BIOVOICES MML approach, before applying to national, regional and European events. The BIOVOICES Focus Group was composed of 62 multi-disciplinary experts in the knowledge fields of the bioeconomy and BBP from organizations representing civil society, public authorities, research and business community.

During the workshop, productive discussions took place with valuable ideas, arguments, best practices and knowledge shared. The BIOVOICES Focus Group Experts considered the cluster of challenges related to Regional/ Local Development as the most relevant for the market uptake of BBP. The individual challenges that were also considered as most important for the same goal were: Up-scaling (Market development), Promote changes in purchase habits (Awareness and trust building), Introduce EU and National incentives (Supporting strategies and standards), Increase sustainable feedstock for BBP (Supporting environment) and Enhance local bioeconomy action plans (Regional/ Local development). For each cluster of challenges, the BIOVOICES identified key/ topic questions to be discussed in MML events were presented and validated and the lists were enriched by the BIOVOICES Focus Group Experts with several others for each challenge, as presented in detail in Section 4 of this report.

Regarding the BIOVOICES MML events, during the Focus Group Workshop it was concluded that the most important business development phase and stakeholder group to target are the business case phase and the business community respectively. Additionally, several experts stressed their interest in supporting BIOVOICES in the organisation of an MML in their respective country and offered valuable ideas and collaboration opportunities for organizing MML events. BIOVOICES Consortium will follow up with them and exploit at best the enlarged network of experts resulting from the Focus Group Workshop.

The validated challenges and key questions/ topics that are presented in this report will flow into the document “BIOVOICES Methodological approach for Mobilisation and Mutual Learning” (D4.4) to be used by BIOVOICES partners to design the MMLs at local, regional, national and international levels.

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ANNEX 1- BIOVOICES Focus Group Members and tables synthesis

	Table	Name	Organization	Stakeholder type	Country
1	4	ANDERSON, Iris Aquilina	Perfect Symbiosis	Civil Society organisation	UK
2	moderator	ALBERTINI, Susanna	FVA New Media research	Business/ industry	Italy
3	1	ANDREI, Madalina	Frontier Management Consulting SRL	Business / industry	Romania
4	4	AXINTE, Sorin Mircea	Technological Information Center - IRECSON	Research / academic	Romania
5	2	BEHRENS, Martin	Agency for Renewable Resources	Public body	Germany
6	3	BLICKLINGOVA, Katarina	Slovakia Bioeconomy cluster	Business / industry	Slovakia
7	1	BONACCORSO, Mario	Assobiotec; Cluster SPRING.	Business / industry	Italy
8	1	BUTU, Alina	National Institute of R&D for Biological Sciences	Research / academic	Romania
9	4	CASTRO, Eulogio	Universidad de Jaen	Research / academic	Spain
10	4	CIRCELLI, Patrizia	CIAOTECH Srl	Business / industry	Italy
11	4	CLAUDIO, Daniel	Spanish Bioindustry Association	Business / industry	Spain
12	1	COHEN, Michela	FVA New Media research	Business / industry	Italy
13	3	CORSI, Ilaria	Lazio INNOVA	Public body	Italy
14	organization	DELIOGLANIS, Iakovos	Q-PLAN INTERNATIONAL ADVISORS	Business/ industry	Greece
15	3	FALLAS, Ioannis	Cluster of Bioenergy and Environment of Western Macedonia	Civil Society organisation	Greece
16	3	FARACO, Vincenza	University of Naples Federico II	Research / academic	Italy
17	2	FERRI, Fernando	CNR National Research Council	Research / academic	Italy
18	moderator	FERRINI, Louis	FVA New Media research	Business/ industry	Italy
19	1	FRANCOCCI, Fedra	CNR National Research Council	Research / academic	Italy
20	3	GERDES, Holger	Ecologic Institute	Research / academic	Germany
21	4	GRIFONI, Patricia	CNR National Research Council	Research / academic	Italy
22	4	HADJIYIANGOU, Polyvios	BBI-JU	Public body	Belgium

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	Table	Name	Organization	Stakeholder type	Country
23	1	HICKINGBOTTOM, Sarah	BioVale	Civil Society organisation	UK
24	3	HOES, Anne-Charlotte	Wageningen Economic Research	Research / academic	Netherlands
25	4	HOUGHTON James	National University of Ireland, School of Natural Sciences	Research / academic	Ireland
26	2	IMBERT, Enrica	University of Sapienza	Research / academic	Italy
27	3	INVERNIZZI, Rachele	South Hemp Tecno	Business / industry	Italy
28	rapporteur	JACOBI, Nikolai	Local Governments for Sustainability	Public body	Germany
29	4	KRAUS, Gloria	City of Sigmaringen	Public body	Germany
30	1	MACADO, Telmo	LIPOR	Business / industry	Portugal
31	3	MAJONE, Mauro	University of Rome La Sapienza, RES URBIS project	Research / academic	Italy
32	3	Malamakis Apostolos	Aristotle University of Thessaloniki, Mechanical Engineering dpt	Research / academic	Greece
33	4	MANNHARDT, Boris	BIOCOM AG	Business / industry	Germany
34	2	MARIANI, Paola	Industrial Technology Park of Lombardia Region	Business / industry	Italy
35	2	MATA-ALVAREZ, Juan	University of Barcelona, RES URBIS project	Research / academic	Spain
36	3	MATISONS, Magnus	BioFuel Region AB (BFR)	Business / industry	Sweden
37	2	MAZZA, Livia	Fondazione ecosistemi	Civil Society organisation	Italy
38	1	MEEUSEN, Marieke	Wageningen Economic Research	Research / academic	Netherlands
39	3	MIHALCEA, Iuliana	Frontier Management Consulting SRL	Business / industry	Romania
40	moderator	MISKUF, Robert	PEDAL Consulting	Business/ industry	Slovakia
41	4	NEAL, Virginia	Minerva Communications UK Ltd	Business / industry	UK
42	4	OKANIKOVA, Zuzana	Pronatur	Civil Society organisation	Slovakia
43	2	OVERBEEK, Greet	Wageningen Economic Research	Research / academic	Netherlands
44	1	PAGNOZZI, Carmine	Association of bioplastic producers (Assobioplastiche)	Civil Society organisation	Italy
45	2	PALOMO, Beatriz	Spanish Bioindustry Association	Business / industry	Spain
46	1	PAPADOPOULOU, Electra	CHIMAR	Business / industry	Greece

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	Table	Name	Organization	Stakeholder type	Country
47	2	PECORARO, Claudia	EC, Communication Officer, DG R&I, F.1 “Bioeconomy Strategy"	Public body	Belgium
48	2	PESKOVICOVA, Dana	National Agriculture and Food Centre	Research / academic	Slovakia
49	organization	POCATERRA, Chiara	APRE	Research/ academic	Italy
50	1	POVAZAN, Radoslav	Slovak Environment Agency	Public body	Slovakia
51	rapporteur	RIGONAT, Pietro	GLOBAZ SA	Business/ Industry	Portugal
52	4	ROTARU, Flaviana	Frontier Management Consulting SRL	Business / industry	Romania
53	4	RUSSO, Ivan	University degli Studi di Verona, RES URBIS project	Research / academic	Italy
54	1	SAVILLE, Marie	Minerva Communications UK Ltd	Business / industry	UK
55	moderator	SMITH, Ronda	Minerva Communications UK Ltd	Business/ industry	UK
56	2	STEINHAUS, Norbert	WILLABONN	Civil Society organisation	Germany
57	3	TILGA, Madis	Nordic Council of Ministers' Office	Public body	Estonia
58	organization	TSAGARAKI, Evangelia	Q-PLAN INTERNATIONAL ADVISORS	Business/ industry	Greece
59	rapporteur	VIPP, Liisa	Civitta Eesti AS	Business/ industry	Estonia
60	2	VORGIAS, Konstantinos	National University of Athens	Research / academic	Greece
61	2	VOS, John	BTG Biomass Technology Group	Business / industry	Netherlands
62	3	YILMAZ, Gulden	Wageningen Food and Research Biobased	Research / academic	Netherlands

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ANNEX 2- BIOVOICES FOCUS GROUP AGENDA

BIOVOICES
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BIOVOICES focus group workshop agenda

Day 1. Tuesday, 13 / 11 / 2018
Palazzo Falletti | Via Panisperna 207, 00184 Roma – Rione Monti, Italy

9:00 - 9:30	**Registration**			
9:30 - 9:40	**Welcome – BIOVOICES overview** Ms Chiara Pocaterra, Agency for the Promotion of European Research, BIOVOICES project coordinator			
9:40 - 10:00	**EU updated Bioeconomy Strategy: the role of the European Bioeconomy network** Ms Claudia Pecoraro, European Commission, Communication Officer, DG RTD, Directorate Bioeconomy			
10:00 - 10:10	**Scope, structure and expected outcomes of the event** Mr Iakovos Delioglanis, Q-PLAN INTERNATIONAL ADVISORS			
10:10 - 11:00	**Overview of the identified challenges affecting the market uptake of bio-based products** ***(BIOVOICES analysis, Sep 2018)*** Ms Susanna Albertini, FVA New Media Research; Ms Greet Overbeek, Wageningen Economic Research			
11:00 - 11:30	**Coffee Break**			
"Working in teams" sessions (the discussions will be moderated by BIOVOICES partners)	**Grouped in 4 teams (tables), the participants will share ideas on how to better address the identified challenges. During each session a different cluster of challenges will be targeted by the team:** × Which are the key discussion topics that better address each challenge? × In which application sector(s) each challenge is more evident?			
	Table 1	Table 2	Table 3	Table 4
11:30 - 12:30	Cluster A	Cluster B	Cluster D	Cluster E
12:30 - 13:45	**Light lunch**			
13:45 - 14:45	Cluster B	Cluster D	Cluster E	Cluster A
14:45 - 15:45	Cluster D	Cluster E	Cluster A	Cluster B
15:45 - 16:10	**Coffee Break**			
Plenary Session				
16:10 - 17:30	**Conclusions of the day – planning of Day 2** Moderators of each Cluster			
17:30 - 18:30	**Informal "Aperitivo Italiano"**			

Remark: the challenges of "introducing EU/national incentives" and "realising standardisation" (Cluster C) will be addressed in all tables within the framework of the respective discussions of each session.

Legend

Development phase

Clusters	1. Business case: Product is 95% mature and becomes a business case	2. Go-to-market: Product is mature, and market increases to 5% among niche groups	3. Acceleration: Market increases above and reaches new user groups
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	

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BIOVOICES focus group workshop agenda

Day 2. Wednesday, 14 / 11 / 2018
Palazzo Falletti | Via Panisperna 207,
00184 Roma – Rione Monti, Italy

9:00 - 9:15	**Registration**
Plenary session	**The participants will share ideas on the organisation of MML events to address the identified challenges, within a development phase, namely:** - At which level each challenge should be (better) addressed during a mutual learning event? A local/regional, national or European level? - Who should be involved? - Do you know of an event already planned during the next year which should be targeted for the organisation of a Mutual Learning event?
9:15 – 10:15	Session 1 **Development phase 1: "Business case"** (Product is 95% mature and becomes a business case)
10:15 - 11:15	Session 2 **Development phase 2: "Go-to-market"** (Mature product and early market penetration)
11:15 - 11:45	**Coffee Break**
11:45 - 12:45	Session 3 **Development phase 3: "Acceleration"** (Market increases and new user groups are reached)
12:45 - 13:00	**Conclusions and further steps**
13:00	**End of the workshop – light lunch**

Legend

Development phase

Clusters	1. Business case: Product is 95% mature and becomes a business case	2. Go-to-market: Product is mature, and market increases to 5% among niche groups	3. Acceleration: Market increases above and reaches new user groups
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	

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ANNEX 3- TEMPLATE FOR IDEAS FOR ORGANIZING A MML EVENT

BIOVOICES Focus Group workshop

Ideas for organising a Mobilisation and Mutual Learning event

Name	
Country	
Key questions:	
Application sector(s):	
Main or side event:	
Target groups:	
Level audience: *(local, regional, national, European)*	
Expected outcomes:	

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ANNEX 4- BIOVOICES Focus Group video and photos

A short video from the event i available at:
https://www.youtube.com/watch?v=YQ4iyBi6cdQ&feature=youtu.be

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