

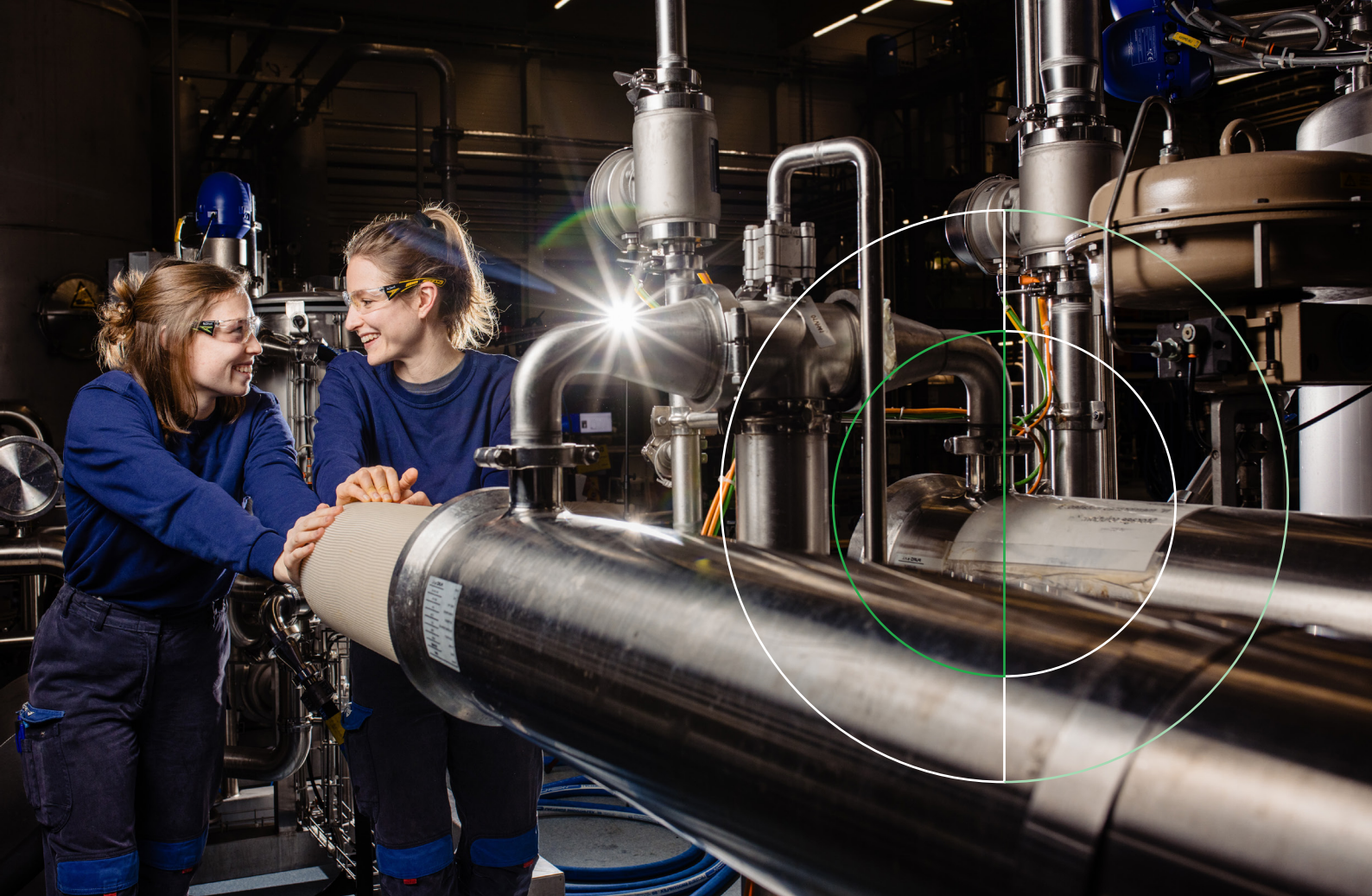


# CBE JU STAKEHOLDER STUDY 2026

## EXECUTIVE SUMMARY

**This study, carried out by Technopolis Group, examines stakeholders' perceptions of the Circular Bio-Based Europe Joint Undertaking (CBE JU) regarding its delivery model and impacts, in the context of the discussions around the future of the partnership under the new Multiannual Financial Framework (MFF). The findings presented in this report are based on interviews with key stakeholders from across the bioeconomy ecosystem, a survey and a dedicated workshop.**

The evidence collected points to the conclusion that CBE JU is widely regarded as one of the EU's most important instruments for advancing the bioeconomy and supporting bio-based innovation. Stakeholders consider the CBE JU as a successful example of a public-private partnership that has helped translate policy ambitions into concrete industrial projects, helping to develop technologies, infrastructure and value chains across the bioeconomy. The programme is seen as particularly valuable in addressing the transition from research to demonstration scale, with stakeholders repeatedly pointing to flagships as its most impactful feature. Flagship projects enabled companies to validate innovation at industrial scale, build first-of-a-kind facilities, attract additional investments and increase visibility within relevant networks. CBE JU beneficiaries consulted for this study further agreed that the programme's funding allowed them to develop their businesses in a way that would often not have been otherwise possible.



CBE JU and its predecessor, the Bio-Based Industries Joint Undertaking (BBI JU), are perceived as having played a major role in building and supporting the European bioeconomy ecosystem. The programme has brought together primary producers, SMEs, large industrial companies and research organisations, across multiple sectors and value chains. Survey results show particularly strong impacts in terms of networking, collaboration and visibility for beneficiaries. The findings further confirm the strategic importance of the partnership in an increasingly competitive global environment. Stakeholders noted that, while Europe faces growing competition in biotechnology and biomanufacturing, CBE JU has helped maintain Europe's leadership in the bioeconomy by creating the conditions for continued innovation, investment and industrial deployment.

The CBE JU delivery model received highly positive feedback across all data sources. Participants in this study emphasised the responsiveness of CBE JU staff, the quality of interactions with project officers and the flexibility shown during project implementation within the boundaries of the Horizon Europe framework. Stakeholders further highlighted the credibility of the evaluation process, the quality of stakeholder engagement mechanisms and the value of bringing together the European Commission and industry representatives in the development of call topics. While some concerns were raised from SMEs and primary producers regarding application complexity, low success rates and administrative burdens, these were generally attributed to the wider Horizon Europe framework rather than to CBE JU delivery model. Notably, the programme was recognised for achieving comparatively strong SME participation despite operating in the same conditions as other programmes.

Stakeholders also highlighted the programme's strong alignment with European policy priorities. CBE JU is viewed as a key tool for supporting the objectives of the Bioeconomy Strategy, the Clean Industrial Deal, circular economy policies and the broader competitiveness agenda. Several participants stressed that the programme does not merely respond to policy priorities but also actively contributes to shaping them, by generating practical evidence from its projects and feeding lessons back into policymaking processes.

The study identified a number of challenges that continue to affect the development of the European bioeconomy. These include difficulties in accessing private capital after project completion, regulatory barriers, insufficient demand-pull measures for bio-based products, and challenges related to the engagement of primary producers. In this context, the creation of the Working Group on Primary Producers and the Bioeconomy Investment Deployment Group were particularly emphasised as positive developments of the CBE JU, reflecting a commitment to enhance

the engagement of feedstock providers and financial actors in the bioeconomy. Stakeholders were clear that these issues extend beyond the mandate of the CBE JU and require coordinated action from the European Commission, Member States, financial actors and the industry.

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