

Report on the 8th SC meeting

Date and venue: 8th October 2025 (9:00-16:45 CEST), Le Louise, 40 Avenue de la Toison d'Or - 1050 Brussels

PARTICIPANTS:

SC members: Teresa ALVARIÑO (online), Lene LANGE, Piergiuseppe MORONE, Kevin O'CONNOR, Merja PENTTILÄ (online), Jónas Rúnar VIÐARSSON, Helena VIEIRA, Malgorzata ZIMNIEWSKA, Yvonne VAN DER MEER, Zane VINCEVICA-GAILE, Jarmila ZIMMERMANNNOVA, Antonis ZORPAS. Excused: Arnaud DRAGICEVIC, Emmanuel KOUKIOS, Sandra KROMMES

European Commission (EC): James MORRISON, Kevin FLOWERS, Paraskevi FILIPPOUSI, Tomasz CALIKOWSKI, Mafalda QUINTAS, May HOBEIKA

Bio-based Industries (BIC): Dirk CARREZ, Samuele AMBROSETTI, Marco RUPP (online)

CBE JU: Nicolás GIACOMUZZI-MOORE, Virginia PUZZOLO, Pilar LLORENTE RUIZ DE AZUA, Simone Maccaferri, Elina ZICMANE and other CBE JU colleagues

Agenda item 1: Opening

Kevin O'Connor (SC Chair)

Mr. O'Connor welcomed all SC members and participants from the EC, BIC and CBE JU Programme Office, recalled the objectives of the SC meetings and thanked the SC members for the feedback provided so far to the draft CBE JU AWP2026 draft.

Agenda item 2: Welcome speeches

Nicoló Giacomuzzi-Moore (CBE JU Executive Director), Mr. Rob Beekers (Chair of the CBE JU Governing Board), James Morrison (Director Healthy Planet, EC DG RTD.B) delivered welcome speeches.

It was stressed that the European Commission has a strong commitment to the bioeconomy, reflected in several ongoing initiatives, including the Bioeconomy Strategy, the New Materials Act, the Life Sciences Strategy, and the Circular Economy initiative, as well as a clear ambition to significantly increase investment in research and innovation during the future FP10.

From the industry perspective, three key priorities were identified: finance, biomass, and market demand. On finance, the "two valleys of death" remain critical challenges, with CBE JU playing a key role. Biomass has significant potential to replace petrol, which currently account for 90% of chemicals' production. To stimulate market demand, specific market-pull measures are needed;

without them, bio-based products risk will be remaining niche. The SC's role is seen as crucial in helping identify technological gaps and so enabling the transition to a bio-based economy.

Kevin O'Connor thanked them for their insights and for all the ongoing activities and remarked that a full transition to a bio-based economy is not a matter of a couple of decades and that continued long term support to develop the bioeconomy and support innovation will take a longer-term commitment. He also added that without bioeconomy we will never be able to have a truly circular economy.

Agenda item 3: Adoption of the minutes of the last meeting, confirmation of confidentiality and no Col, and review of the “points for action”, including the setting up of a SC task force on sustainability and circularity aspects

The SC Chair recalled the provisions regarding conflict of interests and asked if there were any comments on the minutes of the 7th SC meeting and the agenda for the 8th SC meeting. Both were adopted with no comments. The SC Chair informed that the three action points from the last meeting were completed.

Agenda item 4: AWP2026 State of play and Call topics introduction

Simone Maccaferri, CBE JU project officer, recalled the timeline and process for the ongoing consultation, as well as the work progress made since the last consultation of the AWP2026 launched in March 2025. He thanked the SC members for the feedback provided and recalled that the current consultation closes on 17 October. Paraskevi Filippousi (DG RTB.B1) and Samuele Ambrosetti (BIC) presented the final list of topics explaining the rationale for removing and/or postponing some of the topics initially included in the first AWP2026 draft topics list. After that, they provided a summary of the core aspects of each topic retained for the AWP2026 final draft (4 Flags, 5 IAs, 3 RIAs and 1 CSA).

Agenda item 5: SC advise on AWP2026 draft

Kevin O'Connor presented a brief overview of the SC comments, which was followed by an open discussion with SC members and EC and BIC representatives.

Agenda item 6: Update from CBE JU: programme progress

Nicoló Giacomuzzi-Moore, CBE JU Executive Director, gave an update on the status of the CBE JU priorities for 2025, and presented the outlook of priorities for 2026, which include to successfully organize the CBE JU Stakeholder Forum 2026, to valorise the CBE JU projects' portfolio and collect the related KPIs, to strengthen the financial contribution monitoring and reporting and to contribute to the discussions about the preparation of FP10. He also presented the latest developments of the deployment group on finance and investment.

Virginia Puzzolo, CBE JU Head of Programme, presented the progress and next steps of the working group of primary producers, and the new action plan 2025-2027 of the widening strategy. She also presented the submission statistics of the Call 2025, which received 248 proposals,

along with an analysis of the participation per type of entity and country, considering both number of proposals and budget. She also showed the outcomes of the analysis on policy hurdles, as well as the related interactive dashboard. Simone Maccaferri, CBE JU project officer, gave an update on the synergies' strategy. Elina Zicmane, CBE JU Communication Officer, gave an overview of the communication highlights since the last SC meeting and presented the communication priorities for 2026.

Agenda item 7: Updates from BIC on CBE JU-related activities

Samuele Ambrosetti, BIC Programming and innovation manager, presented the BIC updates since the last SC meeting, which included information on the BIC 3.0 & membership and status of its activities in the three pillars: Innovation & scale-up; Access to Finance; and Policy Support. Information was presented on topics such as:

- BIC membership (particularly the BIC project membership has increased greatly the number of entities);
- the Open innovation competition 2025;
- different reports published by BIC (Biowaste study, Biomass study, Trends 2025 report, etc.);
- the position paper prepared on the new EU Bioeconomy Strategy;
- the BIC policy paper in the frame of the Important projects of common European interest (IPCEI on biotech incl. biomanufacturing);
- an update on the forthcoming the BISC- E. For more details, see the presentation 7. BIC update.

Agenda item 8: Updates from EC on CBE JU-related activities

Kevin Flowers, Deputy Head of Unit of DG RTD.B1 presented the latest developments on the policy initiatives relevant to CBE JU, including:

- EU Startup and Scale up Strategy published on 28 May 2025 focused on: fostering an innovation friendly environment (e.g., implementing the European 28th regime, Introducing the European Innovation Act, etc.); driving better financing for startups and scaleups (e.g., expanding the European Innovation Council and Establishing the Scaleup European Fund); supporting startup's market uptake and expansion; attracting and retaining the best talent; and facilitating access to infrastructure, networks, and services.
- Life Sciences Strategy: published on 2 July 2025, positions the EU as the world's most attractive place for life sciences by 2030. It covers health, but also bioeconomy, and among the flagship actions it is expected to deliver the EU Biotech Act.
- Circular Economy Act: planned for end of next year (Nov 2026) and the public consultation to receive feedback is open until 6 November 2025. This Act aims at

creating sufficient supply and demand for secondary raw materials (including critical ones) and a true single market for waste and secondary raw materials.

- EU Bioeconomy strategy: planned for the end of this (Q4 2025) expected to address: Scale-up and commercialisation; deliver high-value applications; securing sustainable biomass sourcing/supply; and international markets positioning the EU in the rapidly expanding international market for bio-based materials, biomanufacturing, biochemicals, and agri-food and biotech sectors.
- European Innovation Act and 28th regime: planned for 2026 (public consultation closed) focused on remove barriers for bringing innovative ideas to market in all sectors and facilitate commercialisation
- Overview of first outline Horizon Europe 2028 – 2034 (proposal published in July 2025), including the pillars, the link with the Competitiveness Fund and vision of future partnerships.