



Overview of state of play on bioeconomy in Spain

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What is currently available for a bioeconomy strategy ?

- ❑ A formal National Bioeconomy Strategy approved in 2015 plus some more recent Regional Strategies (e.g. Andalusia)
- ❑ 4 inter-ministerial working groups (Science, Agriculture, Environment and Economy) and their political commitments.
- ❑ Bioeconomy Observatory Group as expert and central driver. Management Committee: (i) Monitoring Group; (ii) Technical scientific support Group; (iii) Technological networks group.
- ❑ Action Plans: (i) Promotion of public and private research and investment in innovation in the area of the Bioeconomy; (ii) Strengthen Bioeconomy's social, political and administrative frame of reference; (iii) Competitiveness and market development; (iv) Development of new products; (v) Expansion of the Bioeconomy; (vi) Set up of Bioeconomy indicators to evaluate the Plan itself.

What are our target sectors for bioeconomy?

ca. 6,5% GDP and 9% Working Population



Agrifood Sector

5,5% GDP / 2,5M People

- 2,9 % GDP, Food Processing:
28.800 companies
- 2,4 % GDP Primary Production:
890.000 farms
- 0,2 % GDP Fisheries:
5.025 operations



Forestry Sector

0,6% GDP / 21.200 People

- 0,34 % GDP Paper
- 0,18 % GDP Timber and Cork
- 0,08 % GDP Other



Biomass-Energy Sector

0,3% GDP / 34.400 People

- 176 Biomass companies for energy and other purposes
- 47 Companies devoted to biotech



Non-Health Biotech Sector

0,1% GDP / 10.000 People

- 2.831 Companies



17% of Spanish sales abroad

What are the responsible public bodies and relevant stakeholders?

The current Spanish Strategy on Bioeconomy has to be updated once the new government will be in place (hopefully before summer 2019).

In this case, four ministries are likely to be involved in updating the National Strategy on Bioeconomy and to develop the annual national plans plus the monitoring.

- Ministry of Science
- Ministry of Agriculture
- Ministry of Environment
- Ministry of Economy

Stakeholder involved in this process belong to different groups (Public Administration, Industry, SMEs, Research Institutions, Technology Platforms, NGOs)*

* National Institute for Agricultural Research, Spanish National Research Council, CIEMAT, CDTI, IRTA, TECNIKER, BIOPLAT, SusChem SPAIN, BIOVEGEN, ASEBIO, BIOPOLIS

What are the short-term and long-term external policy support needs ?

	Process related support	Technical assistance support	Strategy drafting support
Building Block 1: Describe the bioeconomy concept at national level	A clear government commitment to support and supervise horizontal cooperation on the existing Bioeconomy concept		
Building Block 2: Assess current state of bioeconomy and ambition within the EU Strategy	Assessment and monitoring needed by the Spanish Bioeconomy Observatory concerning indicators, both statistical and on sustainability	Necessary two types of evaluation index: (i) <u>Commitment and activity</u> : measuring the related public and private investment and the number of activities; (ii) <u>Results</u> : evaluation of the economic importance of the sectors linked to biomass-use, and improvements	EU/National support for Bioeconomy studies and aligning with the CAP
Building Block 3: Define bioeconomy measures, platforms and initiatives to achieve targets	Public drive to set up national certification schemes for biomass and bio-based products	Database of funding sources for Bioeconomy	
Building Block 4: Leverage on the national and EU policies for sustainable bioeconomy	Government to establish specific strategies and programmes relevant for the support of the biobased-industrial sector	Task force/working group to impulse a bottom-up process for national/regional funding programmes in place to specifically support the biobased-industrial sector (e.g. SMEs, projects, initiatives, etc.)	EU/National support for task force to help drafting specific achievements from the established policies on sustainable bioeconomy

Actions to advance the development of the bioeconomy strategy (1)

Main actions that helped the development of the Spanish Bioeconomy Strategy (both at national, regional or European level):

1. Promotion of public / private research and investment in innovation in the area of the Bioeconomy.
2. Strengthen Bioeconomy's social, political and administrative frame of reference.
3. Competitiveness and market development.
4. Development of new products.
5. Expansion of the Bioeconomy.
6. Set up of Bioeconomy indicators to evaluate Plans of Action.

Actions to advance the development of the bioeconomy strategy (2)

❑ Main challenges*

- Worldwide food provider
- Sustainable use of natural resources (land, water, emissions, biodiversity, ecosystems)
- Improving production/transformation of forestry products (timber, cork, resin, pulp and paper)
- Improving extraction of energy and other bioproducts
- Improving services linked to ecosystems

❑ Expectations

- Top-class innovation for new production, conservation and transformation systems
- Improve efficiency while reducing losses and wastes
- Cover social expectations, especially related to rural and coastal development

❑ Participants to these actions

- Preparatory work led by research and innovation policy managers
- Later work by different stakeholders (social representatives, industry, academia, national, regional and local administrations)

* It refers to offer an alternative to those fossil-based products already established in the market and to reach a better performance in terms of sustainability and environment