



CICERONE

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Report on survey of programme owners

Authors : Mrs. Antoinet SMITS (RVO)

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Project officer: Eleni Magklara

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Summary

EXECUTIVE SUMMARY Deliverable D4.2 presents the results of the initial survey among policy makers and mandated organisations who decide on programming Circular Economy research. These are the owners that decide on policy objectives and funding of circular economy programmes on European, both at national, regional and local level. The survey aimed at getting their input on priorities, issues, and international orientation. It also aimed at identifying potential front runners for CICERONE's joint programming platform for circular economy. The responses are translated into concrete pointers for the both the platform and strategic agenda. Tailored engagement with the many programme owners (POs) that have indicated interest in taking part, will be maintained.

Approval

Date	By
2019-07-18 10:53:19	Mrs. Cliona HOWIE (CKIC)
2019-07-23 10:26:11	Mrs. Cliona HOWIE (CKIC)

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KEYWORDS

Circular Economy, *Economy* research and innovation, Stakeholder Engagement; Programme Owners Consultation; SRIA; Joint Programming Platform

1 INITIAL SURVEY AMONG PROGRAMME OWNERS

This task is carried out in close cooperation with the survey in Task 1.1: *Assessment of the performance of current CE programmes*.

The survey in 4.1.2 is *Initial Survey Among Programme Owners*, is primarily aiming at learning more about the owners of circular economy programmes, and at gaining their interest and buy-in for the platform; both in terms of content and members.

Specific objectives were:

- 1) To enhance the understanding of circular economy top priorities, the specific problems of a PO at national, regional and municipal level
- 2) To identify opportunities and trends for the future joint programming platform
- 3) To encourage POs to subscribe to the platform as an expression of interest
- 4) To identify the international oriented POs that are willing and motivated to contribute to the further development of the platform and forward their contact details to RVO

The data gathering consisted of an online questionnaire and a series of interviews, either personal or by phone. Furthermore, some partners collected the data for the questionnaires by phone, as an extra service for key programme owners in their countries.

1.1 Outcome online survey

The questionnaire was made available online between January 29 until March 13. All partners were informed beforehand and received instructions in advance. The final online response was 35 respondents, plus another 14 that were conducted by phone and sent in separately. All results are included in the final outcomes.

Not all the online respondents provided their names and only 15 completed all questions. About 60 people started to fill in the questionnaire, but ultimately did not send their answers. It is not clear why such a large number did not finish their input. We cannot explain this substantial number. Part of it is likely due to partners testing the questionnaire before disseminating the link. Also, in hindsight 1 or 2 questions within the section ‘international orientation’ could have been more comprised, but we can only speculate, we have no data of the persons who aborted the survey prematurely.

60 % of the respondents represented national level POs. Regional and European level each represented 20%. A few municipalities were represented, among others through different funding organisations.

More than 80% expressed their intention to contribute to the further development of the Joint Programming platform, or follow the developments, because they feel a clear need for a one-stop shop for international knowledge and networks relevant for policy makers and programme owners.

Priorities of Programme of Circular Economy Programmes

The respondents were given the option to list their top 3 priorities in circular economy. 6 areas were already included in the questionnaire, but respondents could fill in different areas in blanc spaces.

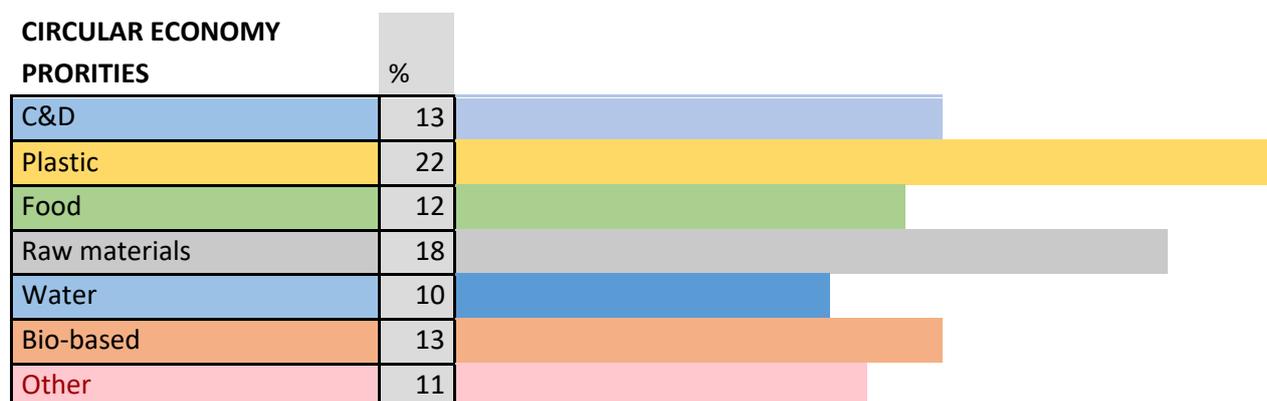


Figure 1 – PO priorities in %

Topic	Priority 1	Priority 2	Priority 3
Construction and Demolition	16	9	13
Plastic	16	47	6
Food	6	13	19
Raw materials	34	9	13
Water	6	0	16
Bio-based	13	6	19
Other	9	13	16

Table 1 – ranking of pre-described priorities

Further priorities not listed beforehand were (*named 3 times or more):

- Resource efficient policies
- Collaboration between actors*
- Insight In raw material use*
- Manufacturing
- Industrial symbiosis*
- Sustainable materials
- Resource efficient society*
- Education
- Recycling* (specifically: composites and multi-materials, chemical or enzymatic recycling of plastics, Processing and recovery of biowaste; digitalisation of the recycling plant In terms of bio-sourced materials);
- Economic profitability of the extraction of raw materials of renewable origin (continuous process with high yields); Economic profitability of purification processes; New catalytic transformation processes to favour continuous and / or single stage processes, to reach high conversion rates and to face the variability of the resources;
- New synthesis pathways using enzymes (bio-catalysis) or combining the advantages of catalysis and bio-catalysis In terms of water
- Industrial symbiosis for water recovery
- Including CE in National Strategies for Research, Development and Innovation as a priority area in the smart specialisation domains.

59% of respondents base the design of their circular economy programme on scientific insights of their national universities and research institutions.

Related to the international orientation of the respondents, 55% are operating on international level and use international available knowledge. Approximately 75% have access to this international knowledge, through international networks and 60% through participation in international projects.

50% make use of international funds, mainly Horizon 2020. The main reasons for not using international available resources are: the processes are too complicated, lack of time, or not applicable to their specific programme.

1.2 Outcome Interviews

The 11 interviews, undertaken either by phone or personally, provided the opportunity to introduce CICERONE in more detail, and gather additional data from POs on their primary issues, preferences for cooperation in joint research and pilots. The results of the interviews have been interpreted in the next chapter of pointers for the joint agenda and platform. The issues raised are listed below:

- Lack of nationally defined system of criteria (benchmarks) for CE development, expected outputs and impact. For example, there are no mandatory certificates/labels developed to certify the quality of CE businesses in the food industry (bio foods), construction industry, energy efficiency, etc. Some business associations in Bulgaria have voluntarily established and adopted such criteria/certificates.
- We need new policies to support sustainable regional development, decentralisation and enable local authorities to use the advantages of CE. Some respondents indicated they consider the region as the most suited level to realise the transition to a full circular economy; in their opinion, national governments tend to keep the options for the route to circularity, open and do generally not get very specific in their choices.
- Governmental organisations should set much more clearly the example for businesses and society, with circular procurement and public campaigns. They also should communicate that circular economy is not a hype but something that will lead to a new, durable economic system.
- The transition to a circular economy involves discovering new ground, exploiting the mutual dependencies of actors in the material chain, bringing increased uncertainties and complexity in content and process. It implies retaining the value and resources in the material chain without losses to the extent possible and seeking symbiosis between the various processes and resources use.
- Governments tend to keep their options open and “make 100 flowers grow”, to enable many initiatives and efforts, and determine later what has proven successful and what has not. But at some point, fundamental choices will have to be made.
- Behaviour change is a key issue. We need public awareness and new capabilities. The strong link with education is generally ignored: change starts at schools and technical training for adapting habits, culture and lifestyles.

- In addition to the technical aspects, attention should be paid to socio-economic aspects, instrumentation (policy measures), transition management, visualisation of future circular perspectives, and monitoring.

1.2.1 *Foreseen Breakthroughs*

Respondents were asked in an open question if they foresee any disruptive developments or breakthroughs in specific circular areas. A slight majority of respondents (53%) confirmed and mentioned the following:

- A combination of technology, public interest and business opportunity will reach a tipping point. Economic profit is a key driver for this to happen in any sector.
- ICT in general; 3D printing
- Repair
- New ways of cooperation within chains
- Integrated approaches for circular cities
- Reengineering technologies
- New technology for additive manufacturing of mechanical and bioproducts
- Substantial longer use of lithium batteries
- More use of plastic and oil-eating bacteria
- Use of the circular potential of packaging and plastic waste
- Potential in the construction sector
- Resource consumption in hospitals
- Procurement and public procurement
- Textiles (chemical recycling, automatic sorting, redesign etc.)
- Phosphorous
- Easy mining
- Bio-based materials

2 POINTERS

2.1 Pointers for the Strategic Agenda

To achieve the interim objective of reaching 50% circular economy in 2030, a common strategic European vision on how such as society might look like is needed to formulate research topics and design tactical interventions. A common approach, cooperation in the supply and consumption chain and trust are critical conditions for success. The R-ladder¹ provides useful guidance when dealing with the technical aspects of a circular transition.

¹ refuse, rethink, reduce, reuse, repair, refurbish, remanufacture, repurpose, recycle and recover

There is a need to develop practical learning tools, such as a taxonomy related to CE, easy to understand by the public and the institutions involved, and systematic and tailored exchange of knowledge.

A significant number of interviewed POs mentioned the need for extra attention for non-technical knowledge: such as how to create a resource efficient society, influence behaviour and establish structural cooperation between actors.

Other relevant needs:

- Monitoring mechanisms and joint vocabulary / definitions
- Standards for recycled materials: let researchers identify central issues within CE where harmonisation is needed, and where action is needed. Then finance these central issues, so we can act on the right issues with a systematic approach.
- Plastics, (also the ones involved in the production of natural raw materials and the production of their substitutes)
- Recycling technologies and standards for recycled materials
- Intelligent and energy and material saving construction.
- Food, especially in the context of bio-products and waste minimisation
- Let researchers identify central issues within CE where harmonisation is needed, and where action is needed. Finance these central issues, so that we act on the right issues from a systematic approach

2.2 Pointers for the Joint Programming Platform

The clear majority of respondents underline the importance of a practical approach. The platform should provide thematic/sectoral information to help fill in knowledge gaps between Member States, e.g. provide information about past/ongoing projects in CE sectors.

Most respondents also plead for a systemic approach and cooperation in cities, national and regional circular networks and industrial chains.

It has to build on linkages between the principles of Sustainable development and CE, and design new policy instruments and practical tools to support CE businesses.

The platform would furthermore be very useful if it is end-user focused and provides information about key actors on EU level working in specific sectors of CE. Ideally, the platform should be keyword-searchable and would allow access to experts and knowledge related to CE (one-stop shop for those interested in getting more information about CE, relevant actions, policies, projects).

The platform can also be used to build a EU (European) network of businesses, key actors and stakeholders (public bodies, NGOs, etc.) active in CE.

Further suggestions for creating added value:

- Give visibility to leading actors, experts in CE and up-and-coming experts, and organisations from lagging countries/regions
- Improve a common understanding of the way forward to make CE happen in reality: it would be good if the platform supports that common view
- Add knowledge, provide cross border and common solutions
- Increase stakeholder involvement and dissemination, if procedures are accessible and easy
- Create synergy and reduce fragmentation
- Share results: prevent double funding in Europe*
- Key topics should be policy and standardisation
- Existing initiatives like Circular Economy Stakeholder Platform should perform a role
- Provide easy access to centralised knowledge, partners and further opportunities to collaborate to advance the circular economy
- Share good practices, ensure information is up-to-date
- The platform has a potential to increase experience and knowledge on other programmes, as well as directions and perspectives for innovative technologies development; provided it is well functioning and used
- There needs to be a common understanding of the way forward to make CE happen in reality: it would be good if the platform supports that common view
- Consider the different legal systems in the circular economy that also have an impact on its design
- The platform must have certain significance and up-to-date information
- Different formats are possible: from virtual meetings to other formats where topics can be discussed further. It is also necessary to conduct meta studies to bundle all the knowledge
- The cooperation in the platform should be based on the potential to make an actual difference
- Personal relationships and theme-related workshops make sense here. This should bring together various stakeholders - not only science but also business and representatives of public authorities (such as Federal Environment Agencies, etc.)

A few respondents expressed their concerns because of:

- Large regional differences between member states and regions, both in technology use and culture
- There are already too many fora
- Little trust in surviving the project period
- No time, not a priority

CONCLUSIONS

The survey has provided key insights to the needs and concerns of POs on different levels throughout Europe. Most of them operate on a national level, and the majority is involved of transforming industry.

The pointers for the Platform and Agenda will be taken up by WP1 and 3, for comparison with other findings and prioritising the input. The POs that expressed interest will be personally contacted by the network managers in WP4.

The survey shows large differences in technology use, organisation and culture between Member States and Regions.

The CICERONE work programme seems largely in line with the needs of POs for practical support and tailored information management.

There is a need to further explain the CICERONE concept.