



**BIOWAYS**

Bio-based economy: network,  
innovate, communicate

## D5.4 Final monitoring report

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| MAIN AUTHORS        | Manthos Bougiouklis, Ioannis Toliias, Eleni Karachaliou (Q-PLAN INTERNATIONAL) |                     |                  |
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| CONTRIBUTORS                 |                      |
|------------------------------|----------------------|
| Name                         | Organization         |
| Evangelia Tsagaraki          | Q-PLAN INTERNATIONAL |
| Kristiina Laurits, Age Laine | Civitta              |
| Lucia Vannini                | UNIBO                |
| Louis Ferrini                | FVA                  |
| Alexandre Almeida            | LOBA                 |
|                              |                      |
|                              |                      |

| PEER REVIEWERS     |                      |
|--------------------|----------------------|
| Name               | Organization         |
| Iakovos Delioglans | Q-PLAN INTERNATIONAL |
|                    |                      |
|                    |                      |
|                    |                      |

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## 1. EXECUTIVE SUMMARY

Aligned with the strategic objective of the BBI Initiative to increase consumer acceptance and awareness of bio-based products to improve their market uptake, the core aim of BIOWAYS project ([www.bioways.eu](http://www.bioways.eu)) was to meet the need for better communication, promotion and diffusion of bio-based products and applications and fuller explanation of their benefits, targeting society at large. By increasing public confidence in the bio-based industry, through clear, attractive and accessible science-based facts and data, more bio-based products and applications will be used, which will have a huge and positive impact on society, the economy and the environment.

Based on the monitoring results and registered impacts of all project activities, BIOWAYS has developed the following key recommendations to improve consumers' awareness of bio-based products, increase their public acceptance and hence contribute to their better market uptake:

- **Design and organize more awareness raising activities and events about bioeconomy**, focusing on different stakeholders and age groups and targeting mainly bigger events/ exhibitions/ conferences to ensure maximum visibility and acceptance among the public;
- **Inform people about the issues that they are interested in regarding bioeconomy**, namely basic definitions, possible biomass feedstocks, origin and processes of bio-based production as well as environmental and societal benefits, with concrete, specific everyday examples in simple language and practical information such as how to recognize them, how to manage them at their end of life;
- **Showcase examples of bio-based products**, to offer a hands on experience of the bioeconomy concept;
- **Use appropriate tools for each target group**, exploiting knowledge assets already developed such as the BIOWAYS toolkit;
- **Target children and young people**, by involving education providers in the communication loop;
- **Facilitate people to voice their views and interests**, by activities that promote open dialogue and involvement of all relevant stakeholders, including research and business community, policy makers and the general public.
- **Increase the impact of public-funded projects**, through collaboration among projects and active involvement of all possible stakeholders

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## 2. INTRODUCTION

Following the close interaction with all relevant bioeconomy stakeholders during the last 2 years, this report outlines recommendations and best practices for future dissemination and communication initiatives at both European (e.g. projects within H2020, national or regional initiatives etc.) aiming to promote bio-based products and support bioeconomy in general. The analysis also aims to highlight the actions needed for the better implementation of the BBI-JU programme.

It should be noted that the detailed results and impacts of the activities under BIOWAYS project regarding

- Progress in consumers' awareness of bio-based products
- Increase in the public acceptance of the socio-economic and environmental benefits of bio-based products
- Increase of trust (societal confidence) related to bio-based products and industries
- Market uptake of bio-based products

are presented in detail in the following project deliverables (note: all project deliverables are available at <http://www.bioways.eu/multimedia/press-corner/public-results/>):

- D5.3 Second Monitoring Report
- D2.4 Report about the Public Perception of bio-based products- societal needs and concerns
- D4.2 Report on the public perception of bio-based products and applications
- D4.3 Report on BarCamps and Thematic Charretes

A comprehensive detailed presentation and evaluation of all the result and impact assessment indicators that were monitored throughout the project will also be included in the Project Periodic Report.

### 3. BACKGROUND

One of the four strategic orientations of the bio-based industry in Europe, as stated in the updated Strategic Innovation and Research Agenda (SIRA 2017)<sup>1</sup> of the Bio-based Industries Consortium (BIC) is to create and **accelerate the market uptake** of the bio-based industry in Europe.

Important market sectors already use high added value bio-based products but there is great potential for the bio-based industry in Europe to expand to the conversion of a broad range of new biomass sources as well as the production of different (i.e. with new functionalities) or new bio-based products. On top of the techno-economic challenges related to the development of new or enhanced bio-based products, the low consumer awareness and acceptance and, in general, the unfavourable public perception of bio-based products and applications raises additional hurdles. Bio-based products should be able to command a premium in their price to offset higher production costs and this will only happen if end-users see these products' benefits in terms of sustainability (or/and performance) and are willing to pay the premium.

To this end, one of the overall strategic objectives for 2020 and 2030 of the BBI Initiative is also to **increase consumer acceptance and awareness of bio-based products to improve market penetration**. Consumer acceptance and awareness should be addressed through **dialogue and communication** with consumer representatives, to understand consumers' needs, concerns and perceptions and respond to them with suitable campaigns. At operational level, the strategic objectives of the BBI Initiative are supported by BBI-JU Annual Work Plan with relevant topics for calls for Coordination and Support Actions (CSAs) and demonstration projects, implemented under the HORIZON 2020 rules.

Aligned with the abovementioned priority of BBI-JU, the core aim of BIOWAYS is to meet the need for **better communication, promotion and diffusion of bio-based products and applications and fuller explanation of their benefits, targeting society at large**. By increasing public confidence in the bio-based industry, through clear, attractive and accessible science-based facts and data, more bio-based products and applications will be used, which will have a huge and positive impact on society, the economy and the environment.

Throughout the project, a variety of communication and educational tools have been developed to inform the target audiences on bio-based products, technologies and applications as well as to use it for educational and training purposes to adults, students at all levels and young people. All these tools comprise the BIOWAYS toolkit, with a variety of knowledge assets freely available to anyone interested in communicating or educating the general public about bioeconomy (<http://www.bioways.eu/toolkit/tool-kit/>).

In addition, a variety of tailor made national and international events (more than 40) such as thematic workshops, barcamps, charrettes and training seminars were held around Europe

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<sup>1</sup> <https://biconsortium.eu/sites/biconsortium.eu/files/downloads/SIRA-2017-Web.pdf>

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with the aim to engage all stakeholders in an open discussion regarding:

- The current status and future potential of bio-based products and the bioeconomy at large
- The end-users' misconceptions around the development and use of bio-based products and their environmental, social and economic benefits to the European society.

In the majority of these events, the participants were shown in a clear and engaging way, through the display of bio-based product sample and prototypes, how bioeconomy is increasingly becoming part of our daily life and how conscious consumer choices can have a positive impact on the environment, society and the economy.

## 4. METHODOLOGY

Various methodological tools were used throughout the project to grasp the initial level as well as the possible impact that BIOWAYS activities might had on people's awareness and engagement in bio-based products.

- **EU-wide online surveys:** During the first year of project's implementation (spring 2017) an EU-wide online survey was carried out with the aim of collecting data about the public perception of bio-based products to assist BIOWAYS partners in fine-tuning the project's communication strategy and to help with the development of targeted information and training materials that would address the specific needs and concerns of the EU citizens. A second round of the survey was launched during this last phase of the project (spring 2018) with the aim of helping with the ongoing development and improvement of recommendations and best practices with updated information. The questionnaire was translated into seven European languages (English, Portuguese, Greek, Italian, Spanish, Slovak and Estonian) and both survey rounds gathered **982 respondents** in total from various EU countries, who were aged mainly between 25 and 65 years old.
- **Short surveys in project events:** Short surveys were conducted at the beginning of a wide range of events organised throughout Europe (e.g. exhibitions and fairs, workshops and round tables within the context of international events, opinion festivals, presentations at schools and universities, etc.) with the aim of studying further participants' initial awareness, acceptance, confidence, engagement and use of bio-based products and the bio-economy. The surveys entailed different questionnaires for adults and children.
- **Statistics monitoring the popularity of BIOWAYS communication activities:** number of recipients of BIOWAYS communication materials, number of BioWatch platform users, number of website visitors, social media, number of users of training materials/ tools, number of participants in events (barcamps, thematic charrettes and workshops, training seminars)

The analysis of all information gathered through the abovementioned approach as well as of all the knowledge and experience gained through BIOWAYS activities led to the formation of specific recommendations to boost consumers' awareness about bio-based products and subsequently enhance their market uptake.

## 5. CHALLENGES TO INCREASE CONSUMERS' AWARENESS AND PUBLIC ACCEPTANCE OF BBPs

Through BIOWAYS online surveys and surveys that were conducted during project activities, the BIOWAYS team managed to gather significant insights regarding the public level of awareness and engagement with bio-based products, the public confidence and trust and the benefits and barriers perceived in relevance to their use.

All BIOWAYS surveys revealed a **significant lack of public awareness regarding bio-based products**, with **several misconceptions regarding the term “bio-based”** and **confusion in recognizing a bio-based product in the market from its label**. The public could **recognize bio-based products used in everyday life**, such as paper products, packaging, cleaning materials and cosmetics, but proved to be **unfamiliar with the bio-based applications used by industry and business** and has a **lack of understanding about the production processes** involved in developing them. The combination of this limited public knowledge about bioeconomy together with the complexity of bioeconomy themes further hinders their market uptake.

The vast majority of the participants at BIOWAYS activities and surveys never used bio-based products, with main reason stated the **limited market availability** and **high prices compared to their conventional equivalents**. However, a positive attitude towards bioeconomy and interest in bio-based products was observed, with consumers seeming to **prefer bio-based products over their conventional equivalents, given the choice**. Consumers find them **trustworthy** in terms of their content and they recognize the **potentially positive environmental impact**.

Regarding the availability of information about bio-based products, although the public recognized that they enjoy **increased visibility in the last two years**, it seems that **most information is focused on the environmental benefits of their use, leaving behind their performance, origin and production processes**. In many cases, the need for a transition to a bioeconomy or of the potential benefit of bio-based products is not clearly understood. Doubts were also expressed about the economic and societal benefits of bio-economy into the creation of sustainable economic growth and new jobs. Given the complexity and wide range of potential impacts of the bioeconomy on society at local and global scales (e.g. debates on food or fuel) and the complex scientific and technical nature of many bioeconomy themes, **different assumptions and perceptions about the risks and benefits of bioeconomy** are developed without a common understanding, negatively affecting public societal confidence and subsequent market uptake.

## 6. POLICY RECOMMENDATIONS AND LESSONS LEARNT

In order to increase public awareness and engagement with the bio-based and circular economy, the following recommendations should be taken into account:

### 6.1. DESIGN AND ORGANIZE MORE AWARENESS CREATING ACTIVITIES AND EVENTS ABOUT BIOECONOMY

**BIOWAYS findings:** The EU-wide online BIOWAYS public surveys and the short surveys conducted among participants of BIOWAYS events revealed that **people's engagement in bioeconomy-related awareness creating activities is very low**. More than 60% of the respondents of the EU-wide online survey and 78,41% of participants in BIOWAYS events answered that they have never taken part in any kind of informative activities related to bioeconomy. At the same time, around 80% of participants have answered that they learned something new at BIOWAYS events. There is need for persistent engagement with the public as it's a key to targeting BBPs and increasing awareness, knowledge and acceptability.

**Recommended actions:** Informative events targeting end-users from different backgrounds and of different age to spread the knowledge about bio-based products and bioeconomy are valuable. An important factor influencing the success of such events is the co-organization or inclusion as satellite events to large-scale events/exhibitions/festivals/ conferences, etc. that can increase visibility and acceptance among the public. For example, the organization of the BIOWAYS' Bioeconomy Village at the Maker Faire Exhibition (Rome, IT, December 2017) allowed us to reach an audience of 150.000 visitors, due to the popularity of this specific exhibition and the Researchers' Night 2017 in Frascati (Rome, IT) where more than 1.000 participants (mainly families) visited the BIOWAYS exhibition booth. In this context, another recommendation is to launch call for proposals to raise awareness about the benefits of BBPs. Future Horizon Europe programme should include topics related with raising awareness of BBPs and its benefits. These topics should be brands and citizens oriented.



Figure 1 The Bioeconomy Village at the Maker Faire exhibition (Rome, IT, December 2017)



Figure 2 BIOWAYS Charrette at the Researcher's Night 2017 (Rome, IT, September 2017)

## 6.2. INFORM PEOPLE ON WHAT MATTERS TO THEM REGARDING BIOECONOMY

**BIOWAYS findings:** A big percentage of participants in BIOWAYS activities have expressed their need to know more about what the bio-based products really are, how they are produced and what impacts their use might have in their lives as well as some practical information such as how to recognise them and distinguish from fossil-based equivalents. This illustrates that there is a need to share some basic knowledge and create a common understanding about bio-based products and bioeconomy, as the concept and its benefits are still not widely understood.

**Recommended actions:** Future informative actions targeting the public should be linked to basic definitions about bioeconomy, to various possible biomass feedstocks, origin and process of bio-based production as well as to societal objectives and specific broader issues that are of interest to citizens (e.g. environmental problems, sustainability etc.). Concrete, specific

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examples of everyday, commonly used and easily recognizable bio-based products along with background information on their production story and sustainability attract the interest of the public and help to visualize and make clear the different aspects of bioeconomy and the connection with circular economy. It also seems that citizens are interested in sales information regarding bio-based products. All information should be in simple language and whenever possible in local idiom. For example, during both at the Bioeconomy Village (Maker Faire 2017 exhibition, December 2017, Rome, IT) and the Researchers' Night 2017 (September 2017, Rome, IT) the visitors had a unique opportunity to discover the Bio-based products through demonstrations and experiment showing practical everyday applications.

### 6.3. SHOW CASE EXAMPLES OF BIO-BASED PRODUCTS

**BIOWAYS findings:** Through the experience gained from the numerous events organized by BIOWAYS in many European countries (for more information, please check D4.3 and D5.3), it has been concluded that the combination of bioeconomy informative actions with the exhibition of real-life examples of bio-based products has a multiplying effect in public's interest and learning about bioeconomy.

**Recommended actions:** Showcasing specific bio-based products examples with the cooperation of research and business communities is an excellent way to show to the large public that bioeconomy is already a part of everyday life and helps visualize and "experience" the bioeconomy messages within "one shot". Instead of exhibiting only final products, another recommendation is to promote the value chain concept, with examples of feedstocks used, so to enlighten the origin and process aspects of bio-based production.



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Figure 3 Bio-based products exhibition sets at BIOWAYS events

#### 6.4. USE APPROPRIATE TOOLS FOR EACH TARGET GROUP

**BIOWAYS findings:** The term “general public” entails different demographic groups, with different interests and communication characteristics, such as consumers, societal stakeholders, children etc. In order to reach them with information that is of their interest, specific engagement and communication tools suitable to their needs should be designed and implemented.

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**Recommended actions:** A wise choice is to start from the most sensitive, informed and curious target audience that will help to diffuse the message to the large public, such as people sensitive to environmental challenges, people interested in science and children. Hands on and interactive activities offering entertainment such as experimental set-ups, workshops etc. is an excellent way to spread knowledge to young children, in the form of playing. Barcamp type of events have proved to be a good means for targeting and involving regular citizens and children; thematic workshops and social hack days constitute a good means for targeting stakeholders already associated with bioeconomy to some extent. Events of various unconventional formats that follow the framework of creativity sessions such as hackathons provide an excellent means of knowledge sharing among students in bioeconomy related knowledge sectors. The main idea of the BIOWAYS project was to deliver messages and informative material through innovative tools, mainly in the form of serious games and gamified solutions, in addition to some more traditional tools, i.e. educational videos and presentations, namely the BIOWAYS toolkit ([www.bioways.eu/toolkit/tool-kit/](http://www.bioways.eu/toolkit/tool-kit/)). The BIOWAYS games are a valuable and effective way to convey complex information in a simple, accessible way to young people as well as to adults. Multimedia educational presentations have also been a valuable tool to train students as well as trainees involved in the bioeconomy sector, from industry, research centres and public institutions. Factsheets with practical examples and the fact that they are easily translatable into all other languages have also been considered to be a valuable source of information for all and a useful educational tool for experts in the bioeconomy sector. To the same end, the BIOWATCH online platform gathers a valuable free collection of documents about the bioeconomy. The BIOWAYS toolkit comprises a compiled knowledge and awareness creation portfolio covering basic aspects of bioeconomy that can be used as a whole package or used in an ad hoc way by selecting single tools to fit any type of activity for future communication and awareness creation activities.

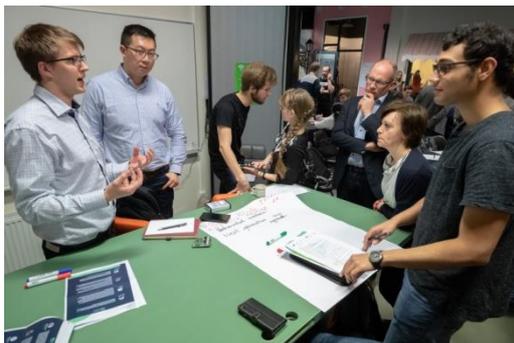


Figure 4: Snapshots from BIOWAYS Bioinnovation Days 2018 hackathon (Tartu, ES, April 2018)



Figure 5: Bioways Stall at Barcamp in Martin, Slovakia

## 6.5. TARGET CHILDREN AND YOUNG PEOPLE

**BIOWAYS findings:** A large percentage of participants in BIOWAYS events were children aged 9-13 and high school students, constituting an enthusiastic audience to plant the seed of preferring BBP to fossil-based equivalents and spread the knowledge to families and society consequently. The education sector, and schools particularly, play an important role in raising awareness about the bioeconomy and from the experience gained through BIOWAYS, teachers seem willing to act as multipliers.

**Recommended Actions:** Schools should be involved more intensively in the knowledge transfer process about bioeconomy, with dedicated information and awareness creation projects. It is also important to engage students and young scientists in informative and awareness actions, as they will make up the next generation researchers or entrepreneurs in the bio-based and circular economy sector. In order to involve young generations, it is advisable to use innovative communication tools and social media, as the vast majority of them uses these tools as main source of information.



Figure 6: BIOWAYS interactive activities with children



Figure 7: BIOWAYS presentation at 22<sup>nd</sup> primary school in Thessaloniki, GR

## 6.6. FACILITATE PEOPLE TO VOICE THEIR VIEWS AND INTERESTS

**BIOWAYS findings:** Apart from dedicated information and dissemination activities, an important precondition to increase the awareness of and the engagement with issues that relate to the development of bio-based production is to facilitate open dialogue and involvement of all stakeholders with the general public.

**Recommended actions:** Science and academia and the business community should be engaged in awareness creating activities with the general public, either in the form of participation or co-organization, gaining mutual benefits such as visibility to research activities, facilitation of market uptake, early involvement of civil society and trustworthiness creation. A useful example in this direction is BIOWAYS educational videos with interviews of researchers about promising results and applications related to bio-based products, as well as interviews with other stakeholders who presented their success stories about bio-based production processes in the industrial context. The BioWatch platform is another key output of the BIOWAYS project designed to help raise awareness of bio-based products and their applications to a wide cross section of society, by providing an interactive communication platform for researchers, industry, policy makers and the general public.



Figure 8: BIOWAYS thematic workshop (Athens, GR, June 2018)



Figure 9: Educational multimedia presentations

## 6.7. ENHANCE COLLABORATION AMONG PUBLIC FUNDED PROJECTS TO MAXIMISE IMPACT

**BIOWAYS findings:** During the last two years, the BIOWAYS consortium was very active in establishing collaborations with other projects, in an attempt to efficiently use the projects resources, networks and communication channels and tools. The BIOWAYS games were developed in cooperation with BIOSTEP and STARProBio. Educational factsheets and videos were prepared with the cooperation of research teams and business active in the bio-based product production. Finally, several events such as the Bioeconomy Village at Maker Faire 2017 were co-organized with similar EU-funded projects, while research teams demonstrated the results of their work. A more detailed presentation of such actions is presented in

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BIOWAYS D6.12 Report of synergies and exchange of experiences established with other initiatives.

**Recommended actions:** Successful projects should be based on collaboration among stakeholders, as learnt in BIOWAYS. Researchers should become more active in the process and experts in communication should provide their expertise to shorten the gap between the advanced research and political vision and the (poor) perception of the large public. Indicative collaboration activities between projects could be: a) the engagement of researchers/business community in producing knowledge and contents (BIOWAYS used this approach for the games and educational material), b) the creation of online communities and online interaction and collaboration tools such as the BioW@tch platform, c) the support of **co-creation activities**, discussion tables and Mutual Learning with different stakeholders (researchers/policy makers/industry/public) to identify gaps and propose solutions.



Figure 10: BBI-JU projects at BBI-JU Stakeholders Forum (Brussels, BE, December 2017)

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