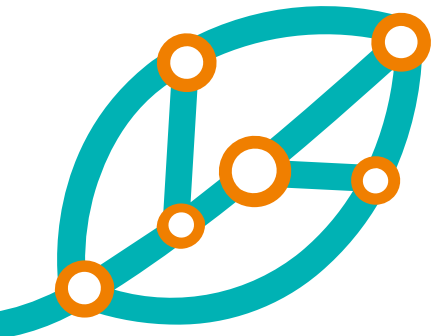


# Bioregions Facility survey

Bio-based solutions in Public Procurement: Are they the way forward to support a circular bioeconomy?

Phase 1 results



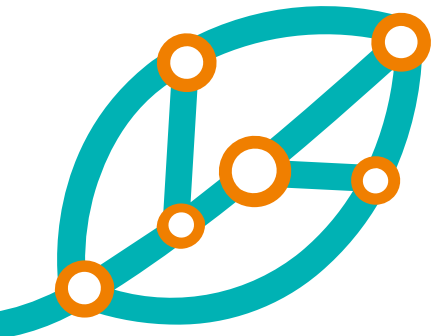
# Rationale

The development of a sustainable, competitive bioeconomy is a priority for Bioregions Facility member regions.

Public procurement acts as a driver to advance considerations in purchasing. Public institutes and municipalities are among the major purchasing powers and thus have the potential to influence the market.

Public procurement can help in the profiling of a region and in communicating and implementing bioeconomic strategies.

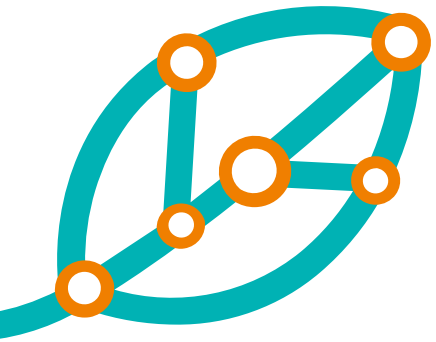
Understanding how actors across Europe perceive bio-based solutions in public procurement is essential to creating and sustaining ways forward for bio-based solutions to support a circular bioeconomy.



# Survey set up

Phase 1 of the survey was conducted in the first quarter of 2021

- An online survey was sent to over 200 individuals:
  - besides Bioregions Facility subscribers and BBI project coordinators (Innprobio, Bioswitch, all.things.bio etc.),
  - we also targeted sustainable procurement institutions & research institutions (BiopREFERRED, ICLEI, nova-institute, FNR etc.) as well as units of OECD and EC dealing with public procurement.
- 56 responses have been collected. Partially procurement specialist, but also many researchers, due to the dissemination scheme of the survey.
- Phase 2 of the survey will start in Q2 of 2021.
- The online survey will be disseminated widely to the public using social media.

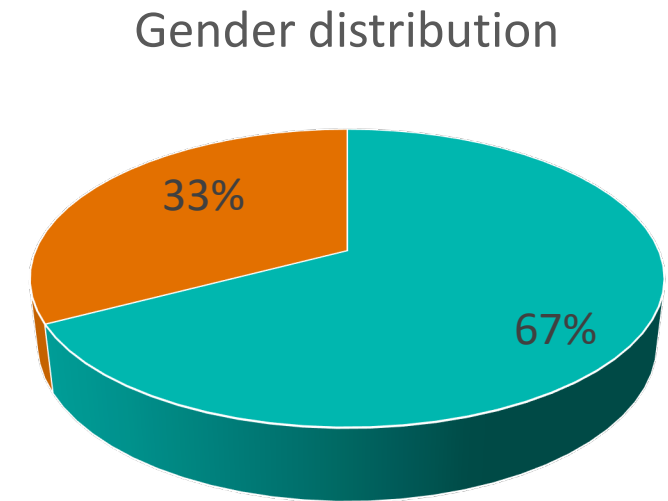
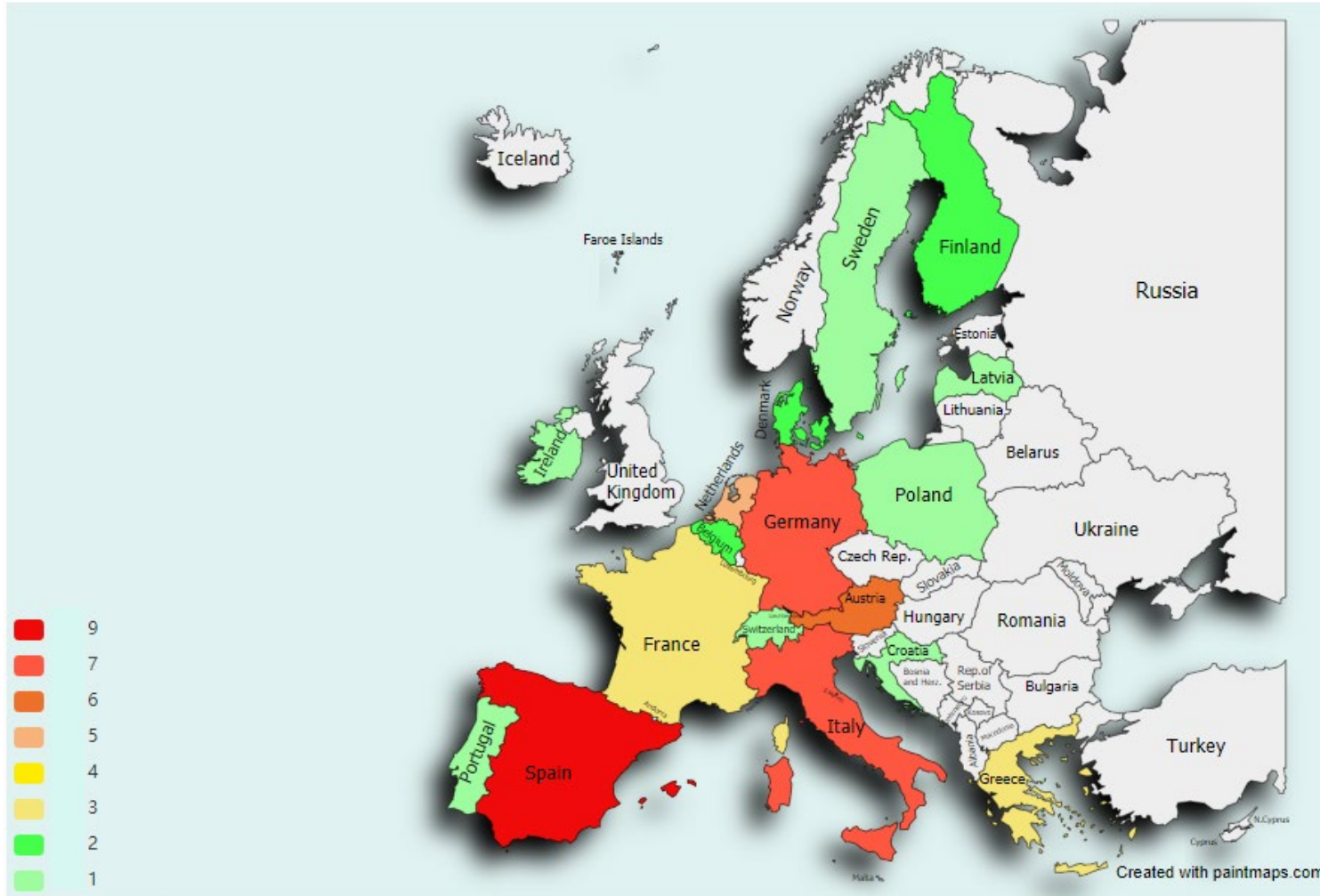


# Key findings

- The respondents see public procurement as the most suitable way to increase the public uptake of bio-based products.
- The building and construction sector is seen as the most relevant sector when it comes to bio-based solutions in public procurement.
- In general the group of non-professional procurers see potential barriers as more relevant.
- For professional procurers the clear driver is political will, (i.e. political decisions and procurement legislation targeting sustainability criteria). Where political will is missing regional incentives, independent from legislation are important.
- In conclusion there is a way forward for bio-based solutions in public procurement, given the political support!



# Demographics



■ Male ■ Female

Answered: 55

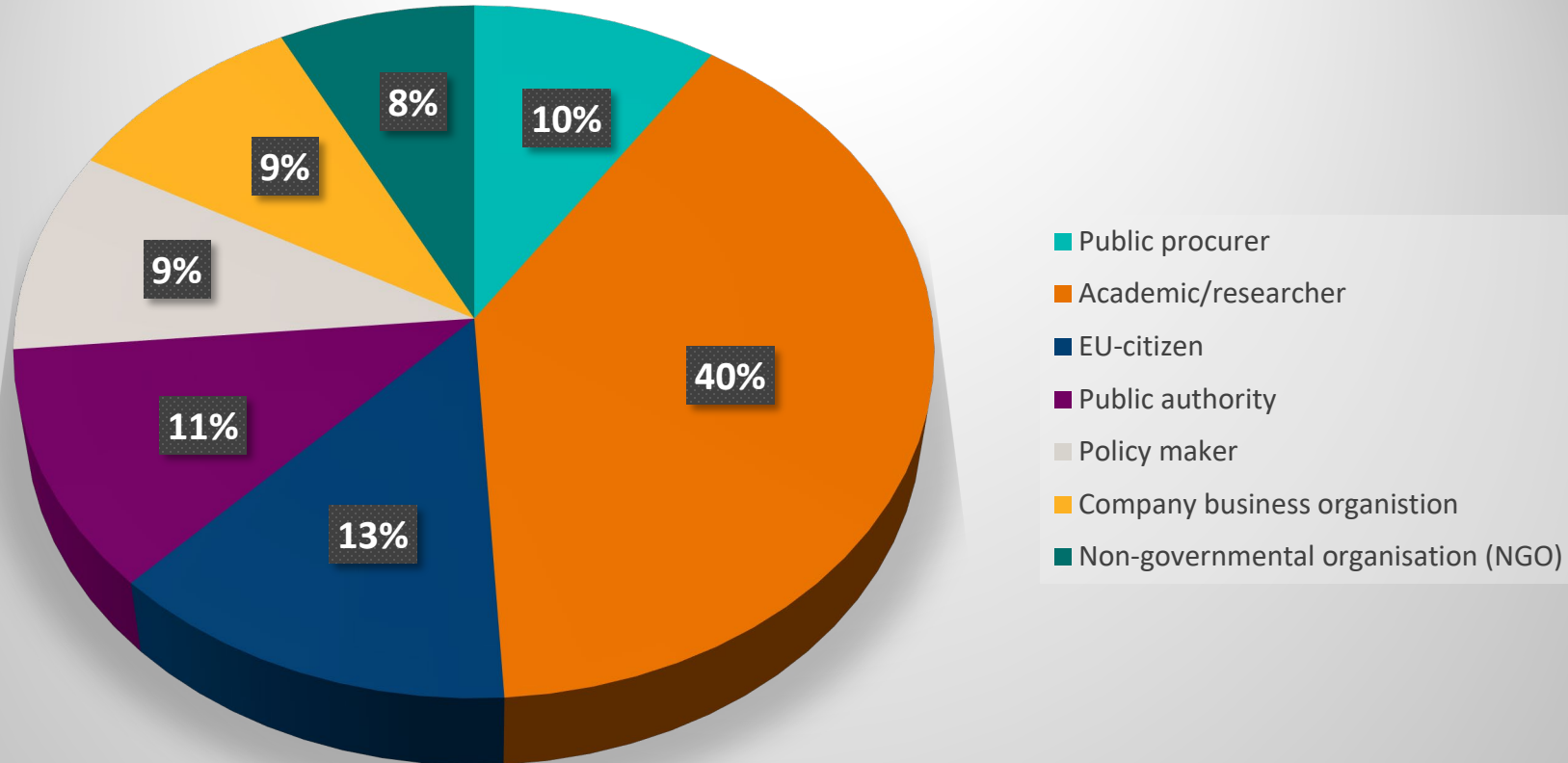
Skipped: 1

Answered: 51

Skipped: 5

Number of responses per country (other countries: One respondent from USA and one from Tunisia)

# Respondent's background



Answered: 54

Skipped: 2

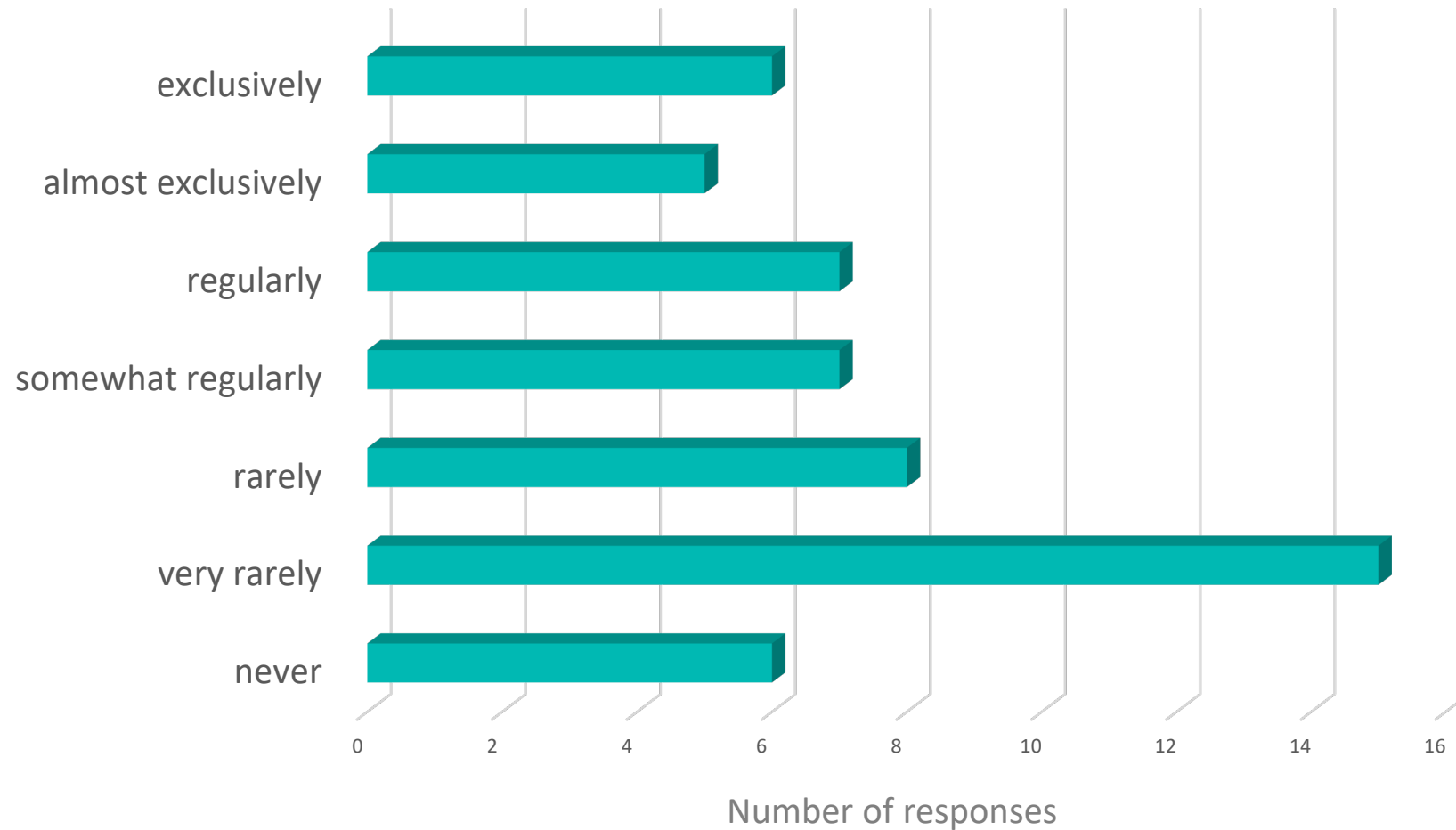
Other answers:

- Business corporation
- Non-academic research organisation
- Science based consultancy

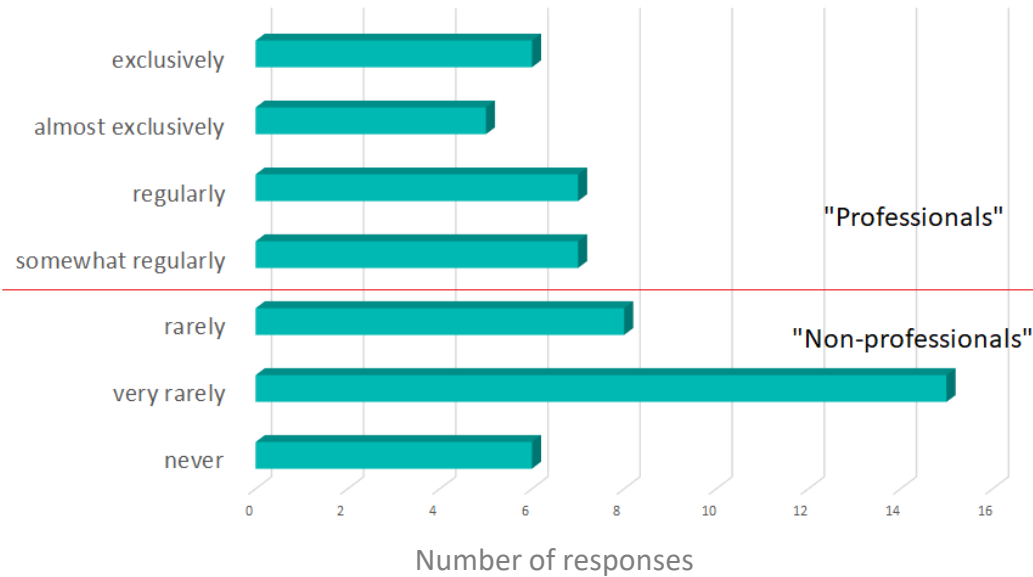
# How regularly does your work deal with public procurement?

Answered: 54

Skipped: 2



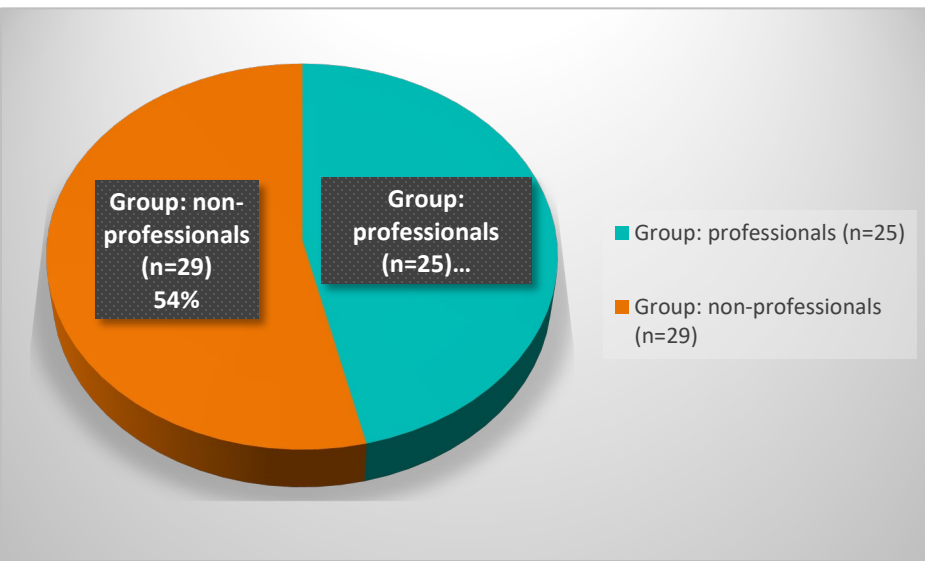
# How regularly does your work deal with public procurement?



We divided the respondents into two groups:

Those whose work has to do with public procurement do „somewhat regularly“ or more frequently (group: „professionals“) and those whose work has to do with public procurement „rarely“ or more infrequently (group: „non-professionals“).

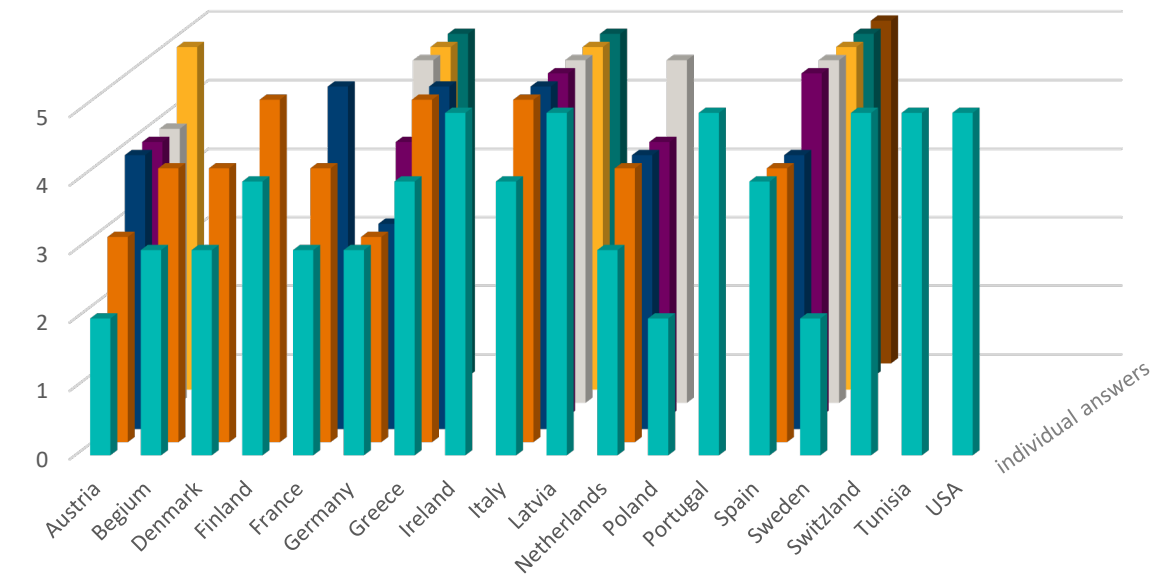
For following questions we will present the collective results, as well as the answers from the two different groups to get an evaluation on whether and where answers differ.



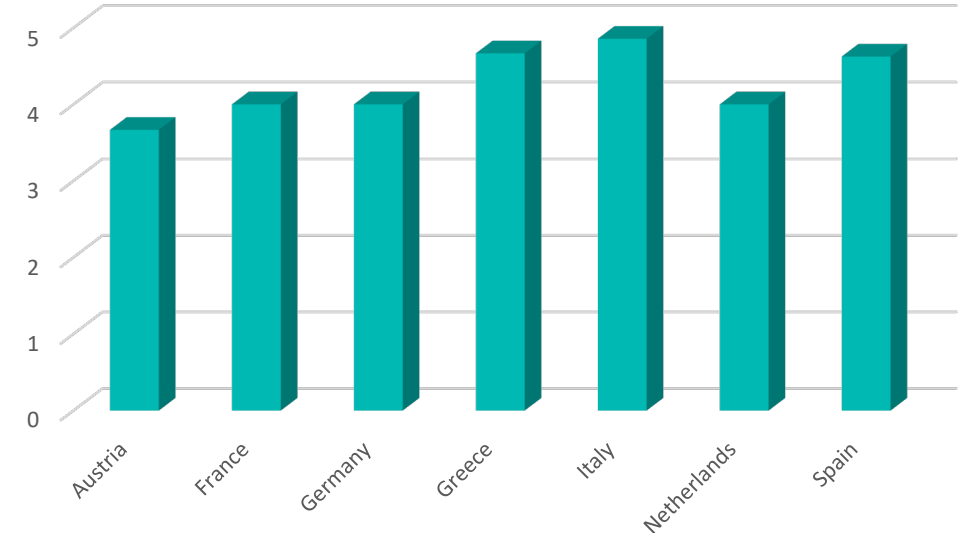
# Will bio-based products and nature-based solutions play an important role in the economic restart?

Answered: 53

Skipped: 3



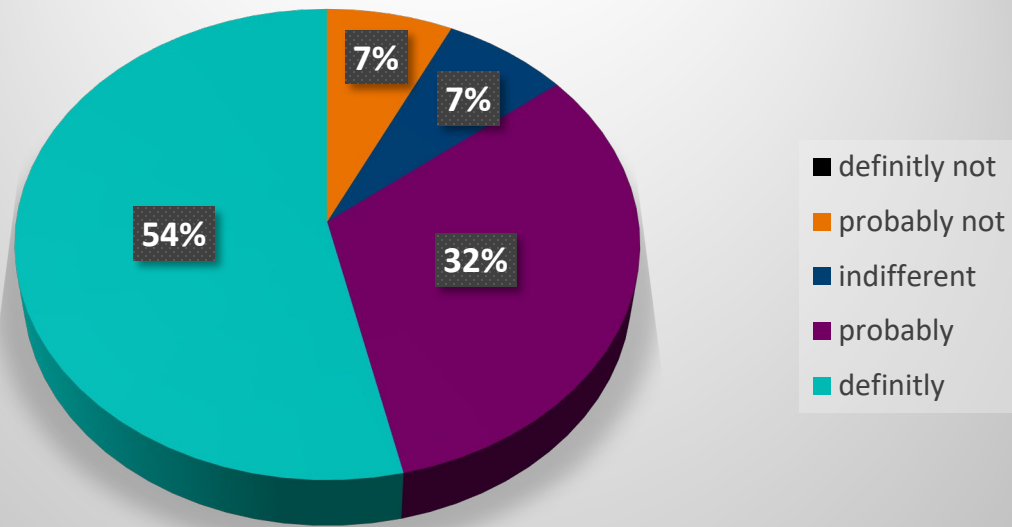
Individual answers from the different countries



Arithmetic mean in countries where we received 3 answers or more

# Will bio-based products and nature-based solutions play an important role in the economic restart?

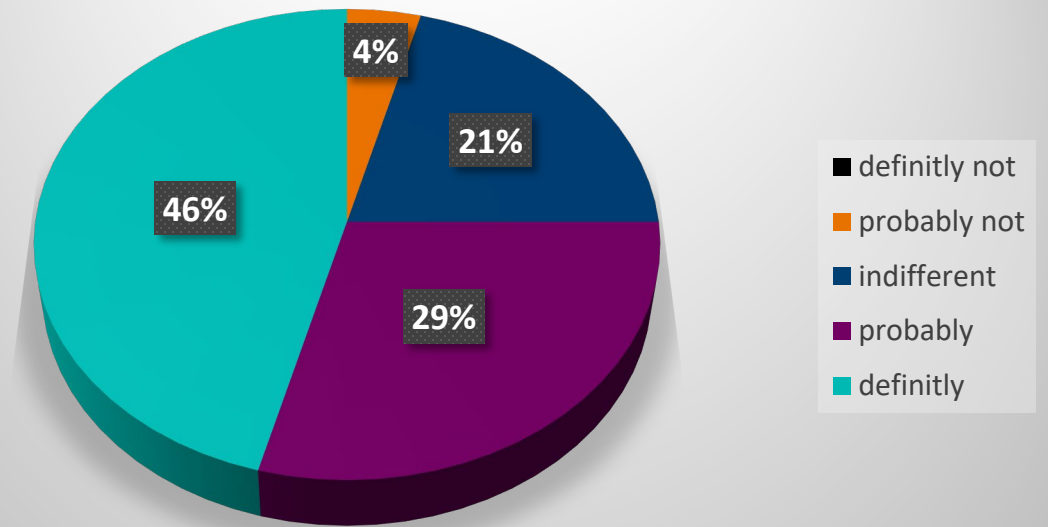
## Non-professionals



Answered: 28

Skipped: 1

## Professionals



Answered: 24

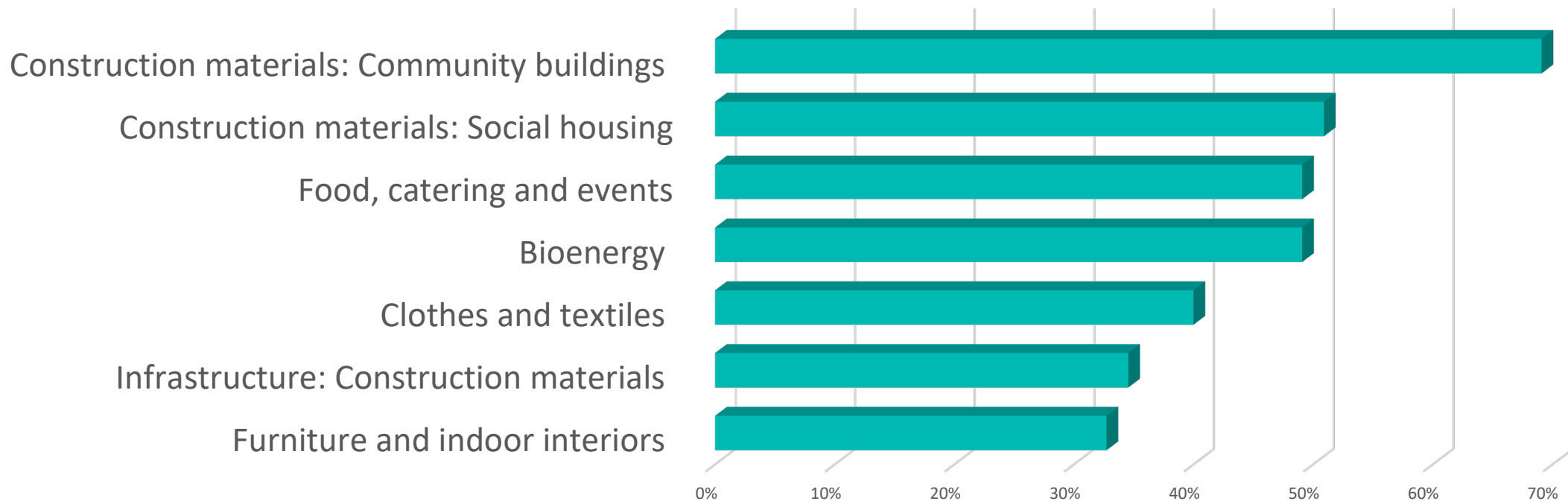
Skipped: 1

Around half of professionals and non-professionals estimate that bio-based and nature-based solutions will definitely play an important role in the economic restart. Public procurement professionals have a higher share of indifferent opinion on the importance of bio-based and nature-based solutions for the economic restart.

# What sectors could have the biggest demand for innovative bio-based solutions?

Answered: 54

Skipped: 2



Less relevant sectors (>25% of answers):

Gardening and landscaping, transport, hospitals and laboratories, vehicles and mobility, IT equipment computers, printers and office supplies.

# What sectors could have the biggest demand for innovative bio-based solutions?



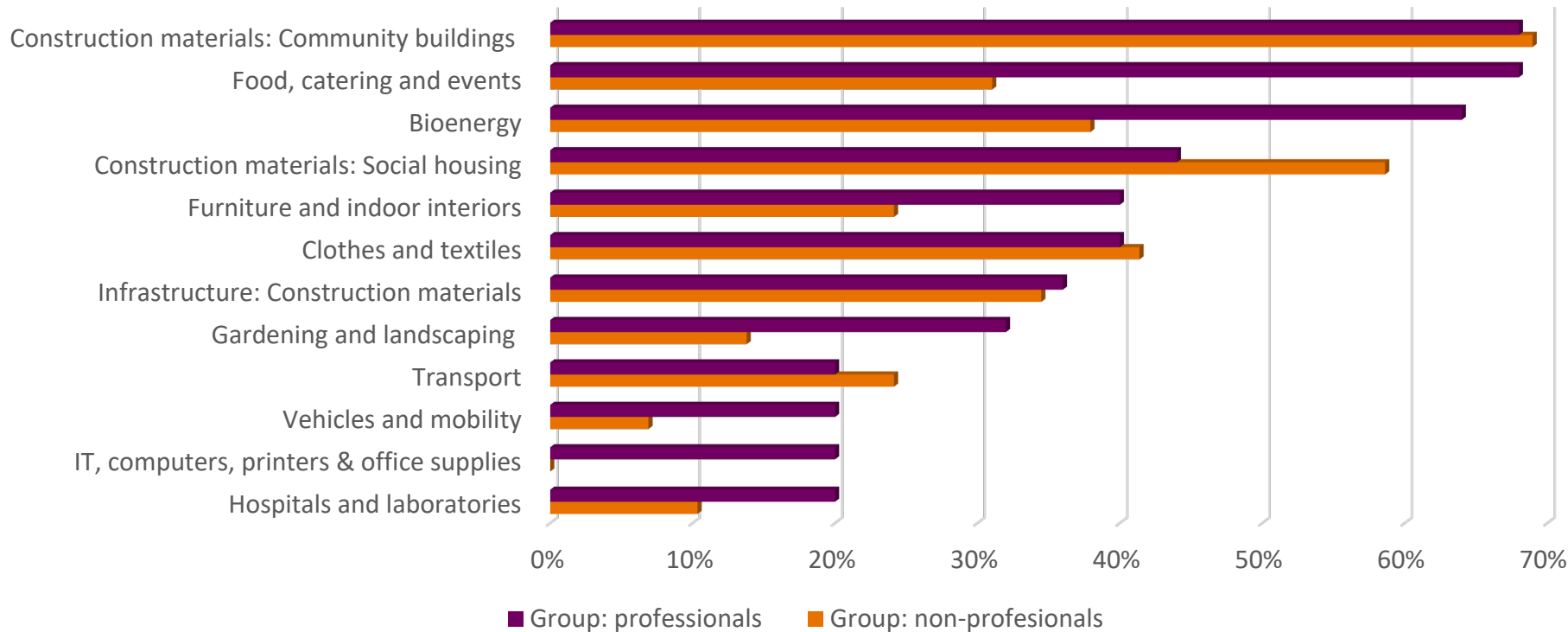
## Comments from survey participants:

- „Packaging is missing.“
- “You ask for bio-based not necessarily biodegradable or compostable. This changes the answer. If you want to use bio-based materials as carbon sinks you should go for long term uses.”



# What sectors could have the biggest demand for innovative bio-based solutions?

Comparison in answers between the professionals and the non-professionals



Public procurement professionals rate „Food, catering and events“ and „bioenergy“ as sectors with demand for innovative bio-based solutions considerably higher than non-professional procurers.

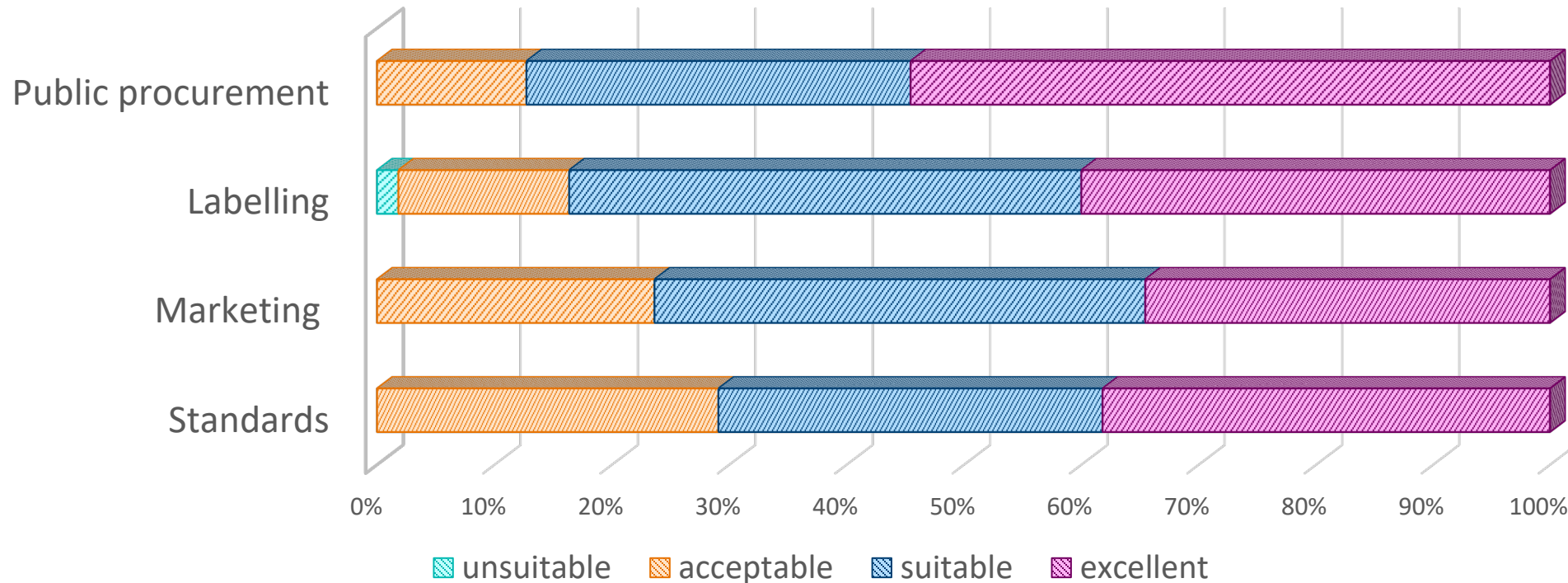
Professionals: Answered: 25  
Skipped: 0

Non-professionals: Answered: 29  
Skipped: 0

# What is the best way to increase public uptake of bio-based products?

Answered: 54

Skipped: 2



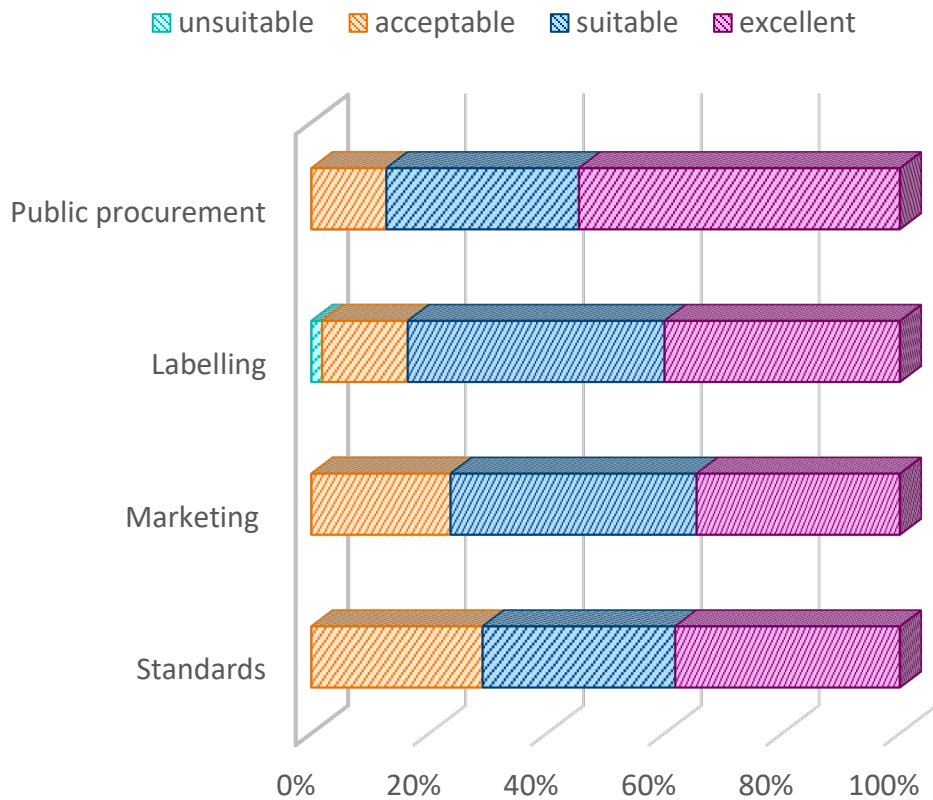
Standards - standardized methods to help manufacture and substantiate claims about on bio-based content and related product properties.

Labelling - Ecolabel, that can boost consumer confidence and increase market demand, by enabling properties and applications of bio-based products to be clearly communicated.

Public procurement - Public authorities acting as lead customer to increase and strengthen the demand for bio-based products and services.

Marketing – Increased visibility, design positive messaging for the customer

# What is the best way to increase public uptake of bio-based products?



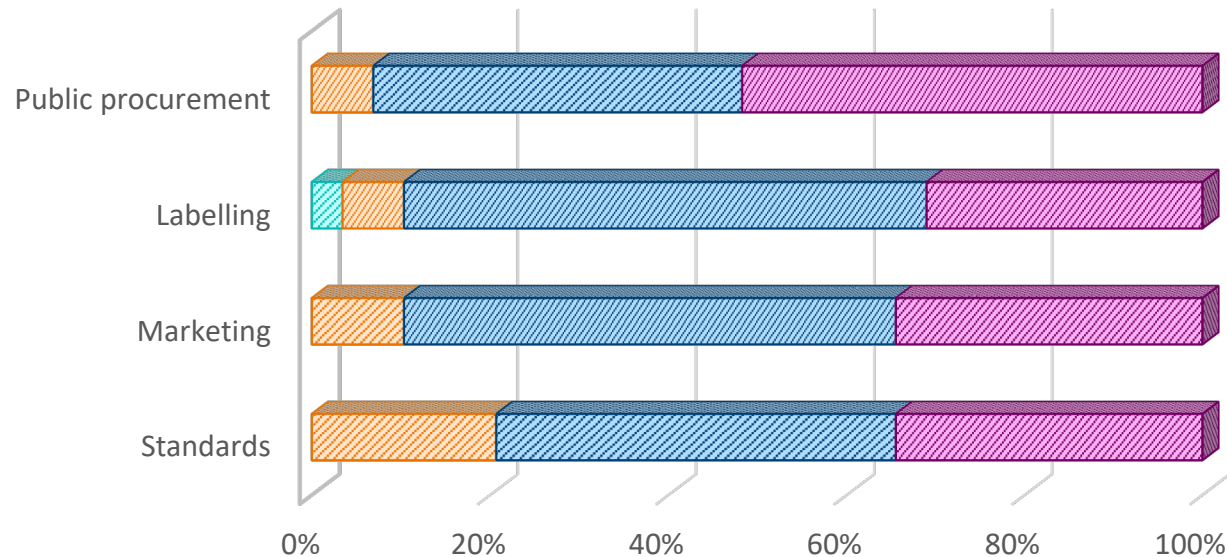
## Comments for survey participants:

- “Standards: more support for innovation and investments is needed, as a change to such technologies of production requires upfront support.” (Italy)
- “Increase awareness and educational activities aiming to inform and stimulate the general public (emphasis should be given to children) about the benefits of bio-based products. e.g. showcasing everyday products (touch and feel experience), talking with researchers/businesses who develop such products (learn from the expert), educational material and activities to schools (examples in everyday life), etc.” (Greece)
- “Honest marketing. The same goes for standards and labels. They have to tell a true and sometimes complex story about bio-based materials. This is important for a support base. The Dutch government set up guidelines for bio-materials, that prevent competition with food and biodiversity and promotes high end application (or high-quality application).” (Netherlands)
- “Circular bio-based Delta develops a database with bio-based products for the people who are looking for those products for procurement. Such a database increases the visibility of bio-based products.” (Netherlands)
- “Government financial aid for the production of certain raw materials and carbon tax.” (France)

# What is the best way to increase public uptake of bio-based products?

## NON-PROFESSIONALS

unsuitable acceptable suitable excellent

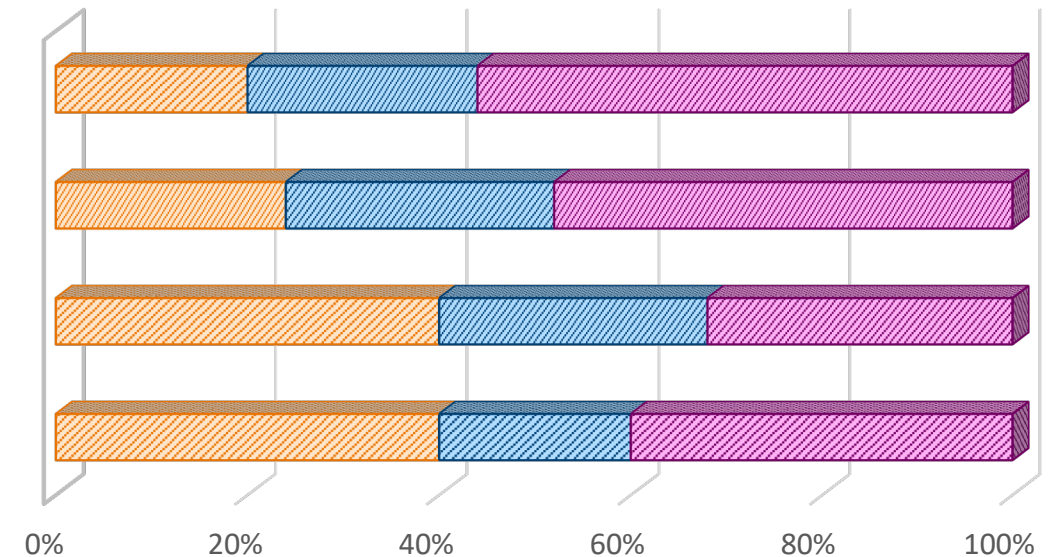


Answered: 29

Skipped: 0

## PROFESSIONALS

unsuitable acceptable suitable excellent



Answered: 25

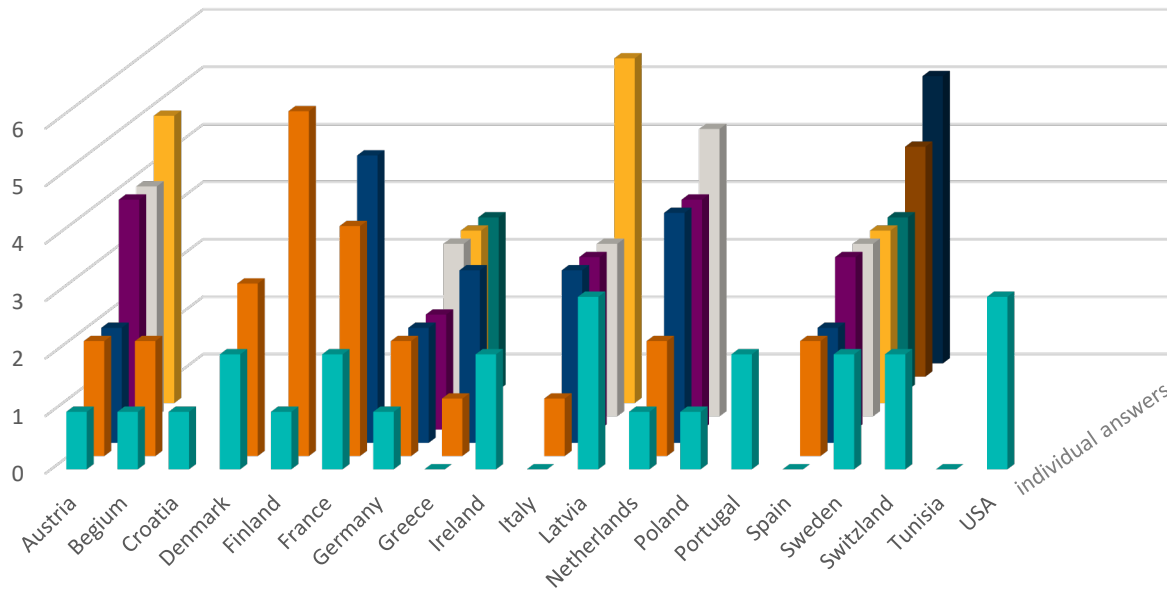
Skipped: 0

Among the proposed options, both professionals and non-professionals see public procurement as the most appropriate way to increase the public uptake of bio-based products. The shares for „suitable“ are generally higher in the non-professional group. The shares for „acceptable“ are generally higher in the professional group.

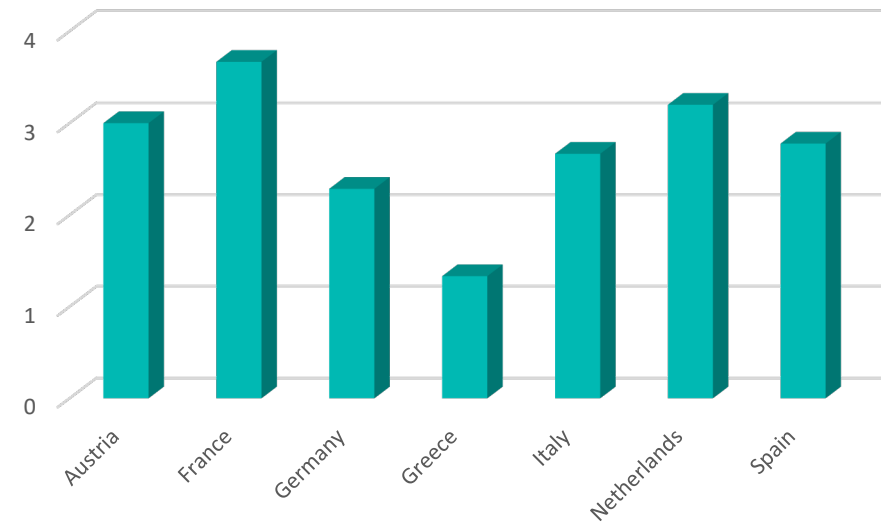
# Assessment of the initiative and momentum regarding the topic of "bio-based products in procurement" in regions.

Answered: 54

Skipped: 2



Individual answers from the different countries

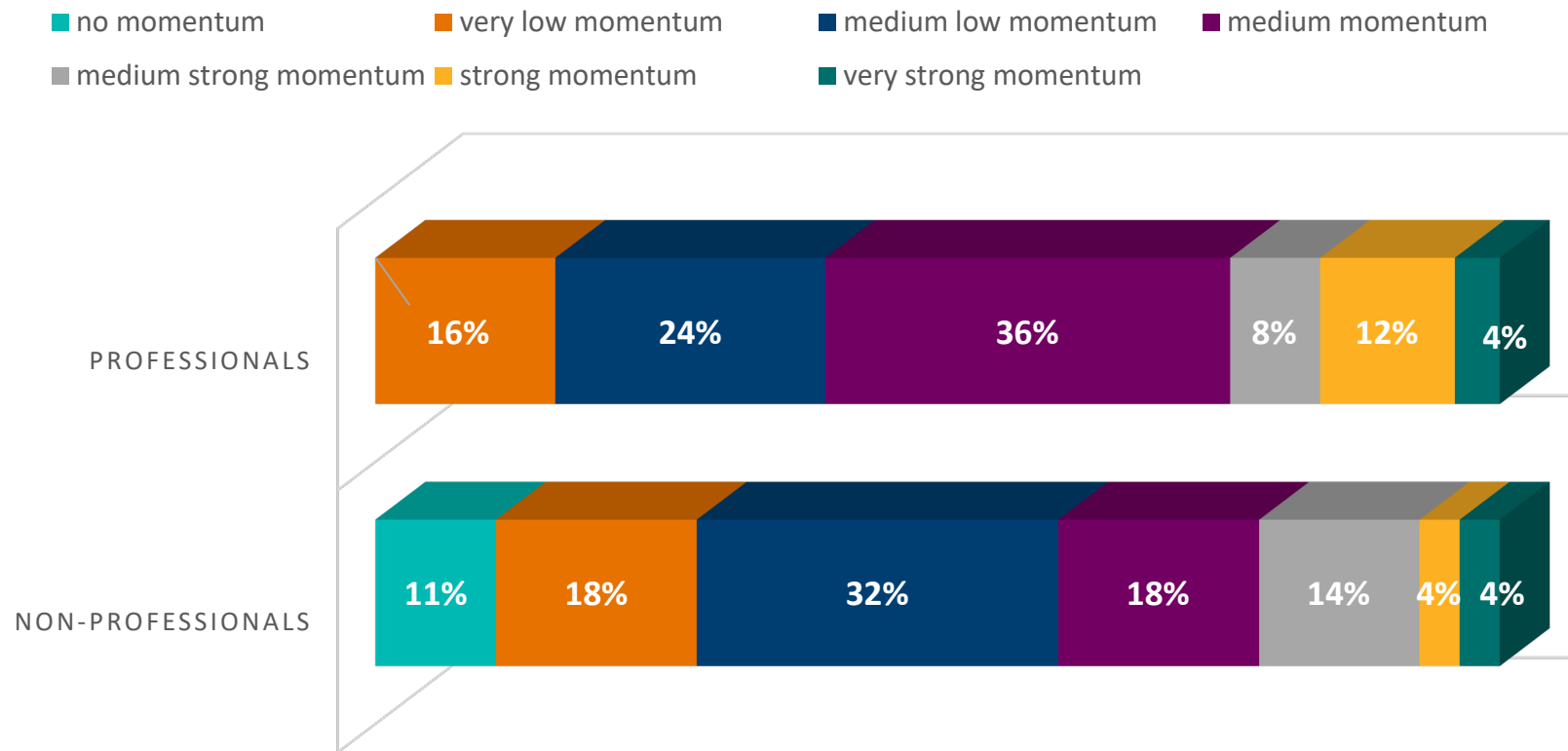


Arithmetic mean in the countries where we received 3 answers or more

Rating: 0 = no momentum; 1 = very low momentum; 2 = medium low momentum ; 3 = medium momentum; 4 = medium strong momentum; 5 = strong momentum; 6 = very strong momentum

# Assessment of the initiative and momentum regarding the topic of "bio-based products in procurement" in regions.

## COMPARISON BETWEEN THE GROUPS



Professionals:  
Answered: 25  
Skipped: 0

Non-professionals:  
Answered: 28  
Skipped: 1

In our survey, no professional responded with „no momentum“ regarding bio-based products in procurement.

Otherwise, there are similar tendencies in the assessment of initiative and momentum between professionals and non-professionals.



# What is the reason for your score regarding initiative and momentum regarding the topic of "bio-based products in procurement" ? (Selection of answers)

Answered: 47

Skipped: 9

## Austria

- medium low momentum: „A national strategy for circularity is on its way, but the topic of bio-based products is of rather low priority at the moment in procurement.”
- medium high momentum: “Because Austria is proactive in developing and securing goods from bio-based industries.”
- medium high momentum: “There are currently public funds (“forest funds”) in Austria that will invest a considerable amount also in wood-based products, research and development of biofuels and biogas etc.”
- high momentum: “Due to current research calls.”

## Germany

- medium low momentum: “No momentum and visibility for bio-based products any more. Focus is on circular economy which includes bio-based but this is often neglected. Public procurement with a specific focus on bio-based does not exist, focus in on green procurement if any, which can of course cover also bio-based products but most public procurers stick with energy saving solutions and green paper.”
- medium low momentum: To my knowledge there is too much caution to substantially push towards bio-based products (also in public procurement).
- medium momentum: “Because bio-based per se not necessarily considered positive, key issues in regards to food crops, land use.”
- medium momentum: “Momentum is good in theory but not yet implemented.”

# What is the reason for your score regarding initiative and momentum regarding the topic of "bio-based products in procurement" ? (Selection of answers)

## Belgium

- very low momentum: “Sustainability is not decisive in the purchasing decision.”
- low momentum: “Because bio-based construction is moving slow and the issue of lack of local biomass for energy.”

## Netherlands

- Low momentum: “Because it's a difficult and complex subject which demands a different perspective on how to boost Green Public Procurement.”
- medium high momentum: „Although firms who offer bio-based products are not always visible have been slow to regularly/purposely purchase.”
- medium high momentum: “Because there are a lot of initiatives and willing government organizations.”
- high momentum: „In the Netherlands there is a MVI Manifest (<https://www.mvicriteria.nl/en>) signed by local, regional and national governments in which they have formulated the goals they want to reach by for instance bio-based.”

## Denmark

- medium low momentum: “We are just in the beginning of this development. There are still a lot of barriers and misunderstandings. However things will look very different in a few years if we make the right choice now.”
- medium momentum: „Green procurement is well established practice in DK, although not exclusively focused in bio-based materials or products.”



# What is the reason for your score regarding initiative and momentum regarding the topic of "bio-based products in procurement" ?

## Finland

- very high momentum: “Because bio-based products have a constant momentum.”

## France

- medium low momentum: “Consumer demand is visible but market adjustment is too slow.”
- medium high momentum: “Bio-based product demand is increasing, but need to be clarified and need to rely on trusted organizations (e.g. ecolabels, norms...) to convince”

## Italy

- medium momentum: „But we can do more by better interconnecting the bioeconomy sectors and actors.”

## Spain

- low momentum: „Due to few initiatives and no connection between initiatives.”
- medium momentum: „Initiatives exist, but not enough momentum for the general use of these bio-based products.”
- high momentum: “Due to tendency on ecological transition and sustainability objectives”

Greece – Medium momentum: “While there is wide acceptance, the price gap is still wide.”

# What is the reason for your score regarding initiative and momentum regarding the topic of "bio-based products in procurement" ?

Similar answers from different regions and reasons from participats outside EU and from the OECD

Italy & Netherlands – very low momentum: “Because going back to 'normal' economics after Corona is the overwhelming attitude at the moment.”

Italy - low momentum & Austria - medium low momentum: “Lack of awareness of bio-based products in public procurement.”

Spain & Greece - low momentum: “Lack of information”

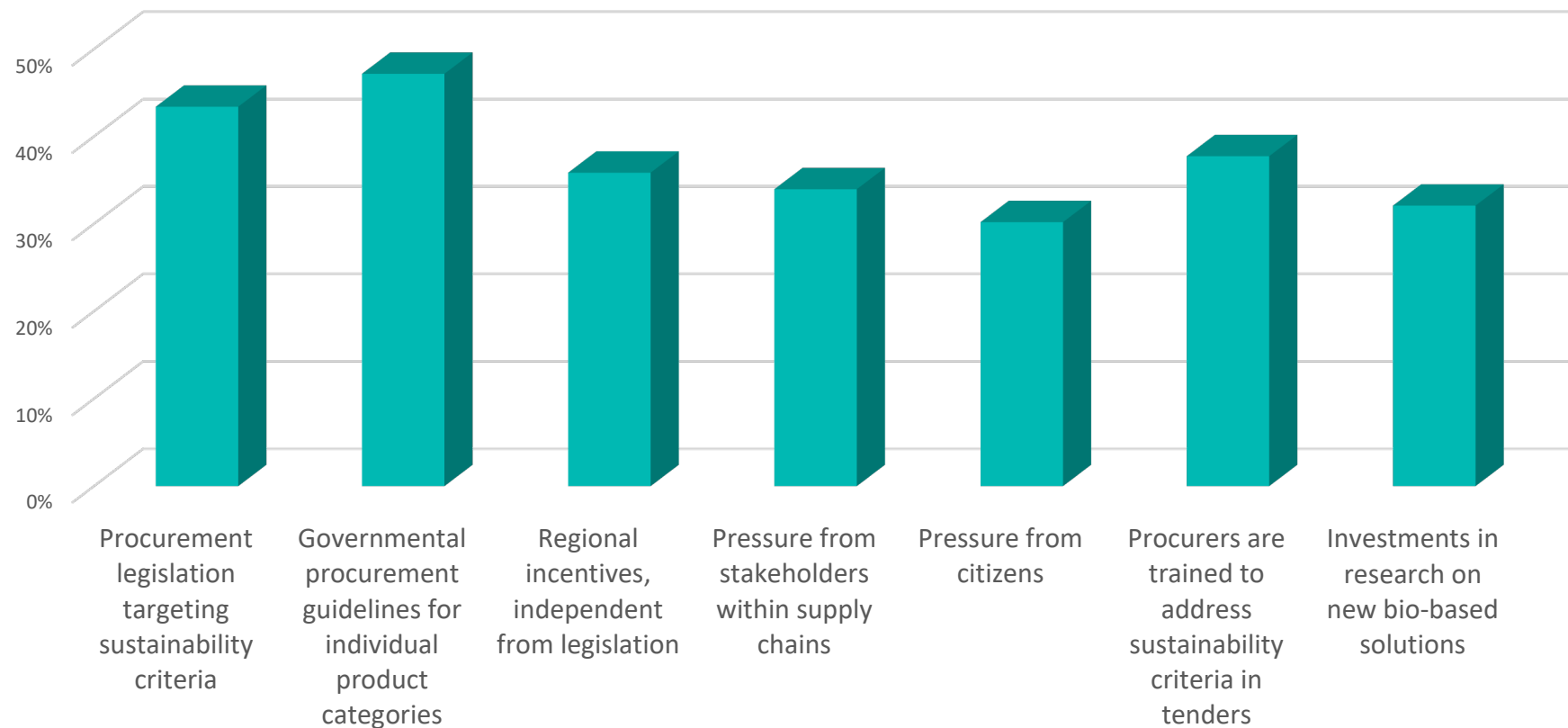
USA – Medium momentum: „While there is an awareness of and access to an array of products, procurement officials have been slow to regularly/purposely purchase bio-based products.”

OECD - high momentum: “We work with many member and non-member countries. We see countries having an increased interest in advancing this topic.”

# Main drivers for increasing the use of bio-based products in procurement? (Multiple selection possible)

Answered: 53

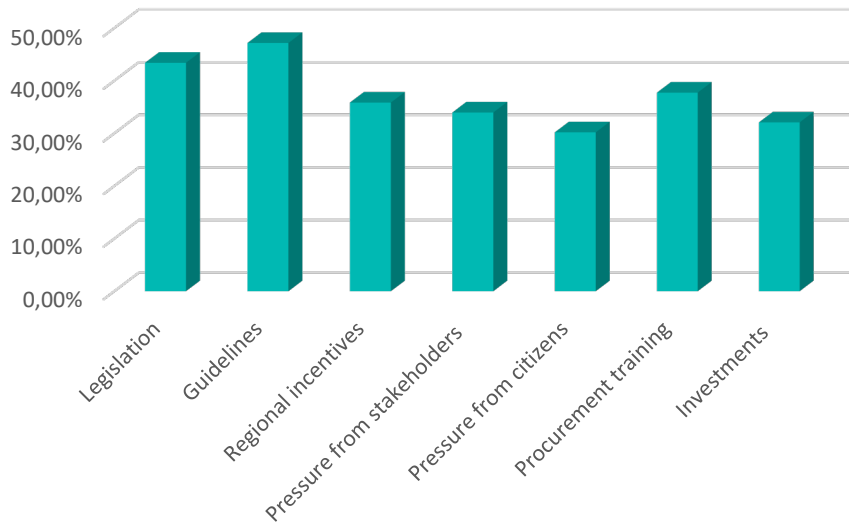
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# Main drivers for increasing the use of bio-based products in procurement? (Multiple selection possible)

Answered: 53

Skipped: 3

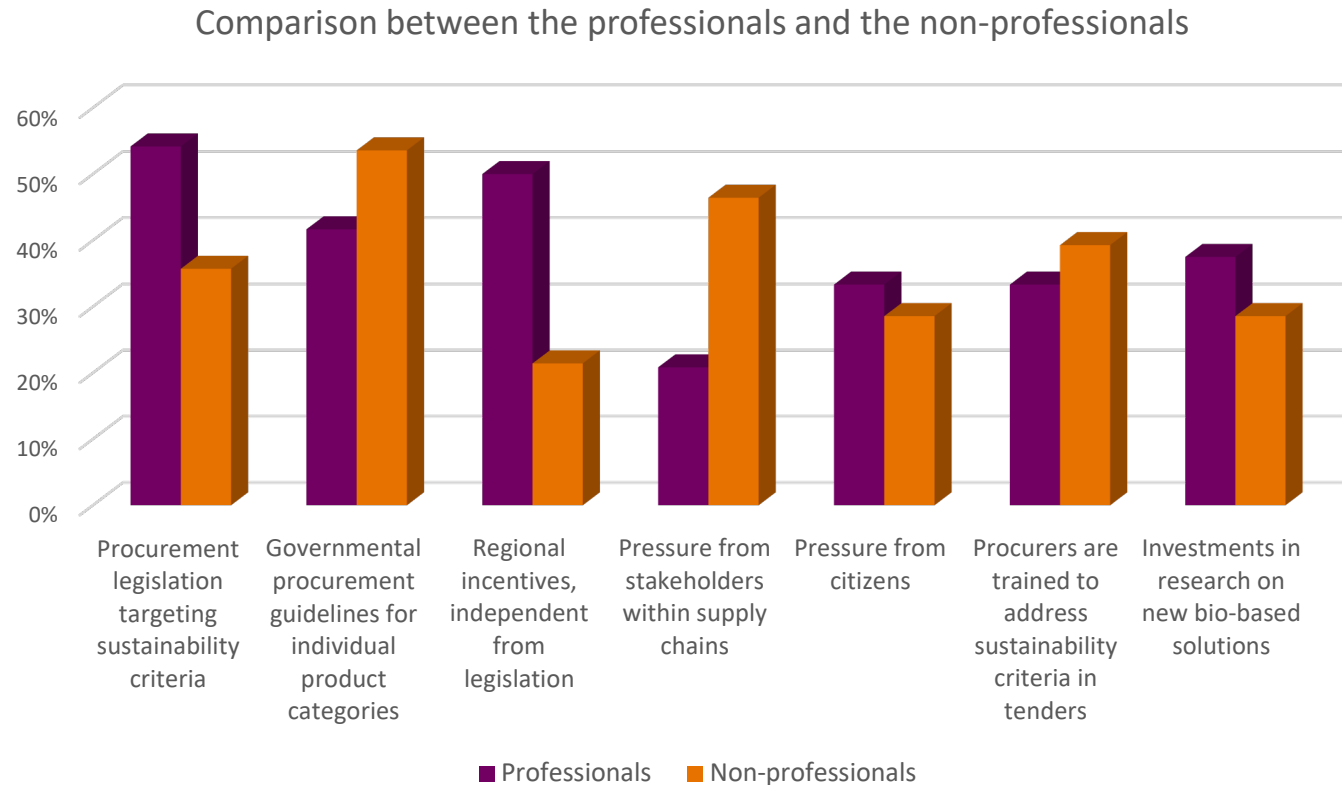


## Comments for survey participants:

- “Lack of competencies from the public buyers and the incentive to change their approach from the 'best price offer' and include additional (environments, social, etc.) criteria in the procurement process. I would also add as key driver the 'procurement legislation targeting sustainability criteria' as this would 'push' the adoption of sustainability criteria and provide a clear environment for such procurements.” (Greece)
- “Incentives represent the best way to bring together companies still based on an old approach. While research is essential to create the knowledge bases on which to build the supply chains.” (Italy)
- “Because of the complexity of the subject (with lots of chemistry terms) education and training would help public procurers to overcome their fear of the unknown. Public procurement is always led by legislation. If we are obligated to apply GPP-criteria, then we will.” (Netherlands)

# Main drivers for increasing the use of bio-based products in procurement?

(Multiple selection possible)



Professional procurers deem „procurement legislation targeting sustainability criteria“ and „regional incentives independent from legislation“ as more of a driver than non-professionals.

Non-professionals see pressure from stakeholders within supply chains“ as more of a driver for bio-based products in procurement than professional procurers.

Professionals:

Answered: 25

Skipped: 0

Non-professionals

Answered: 28

Skipped: 1

# Good practice examples for bio-based solutions in public procurement, according to survey participants. (Selection of answers)

Answered: 40

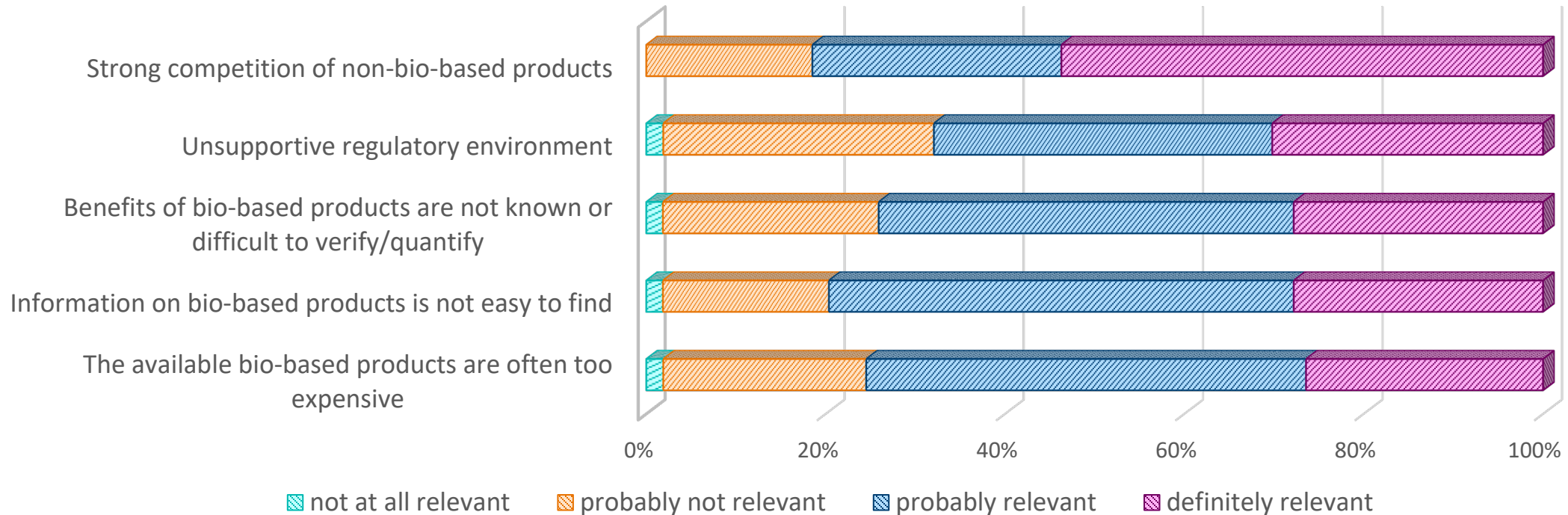
Skipped: 16

- [Hypérion wooden tower](#) (Bordeaux, France)
- The Irish Government has agreed that there will be a phased introduction of [green criteria targeting priority products and services](#) as well as building appropriate green criteria into OGP frameworks and providing support and guidance to procurers. /
- [HoHo](#) in Vienna (Austria)
- Initiative to set up a [database](#) which show all of the bio-based products and materials currently on the market. (bio-based Delta, NL)
- “[Tractaatweg](#)” in Zeeland. Natural plastic as tree ankers, Geotextiles, bio-based fences.
- USDA’s [Biopreferred program](#)
- Revision of the German “[Circular economy law](#)” now includes an article on PP (§45)

# Barriers for the uptake of bio-based solutions in public procurement

Answered: 54

Skipped: 2



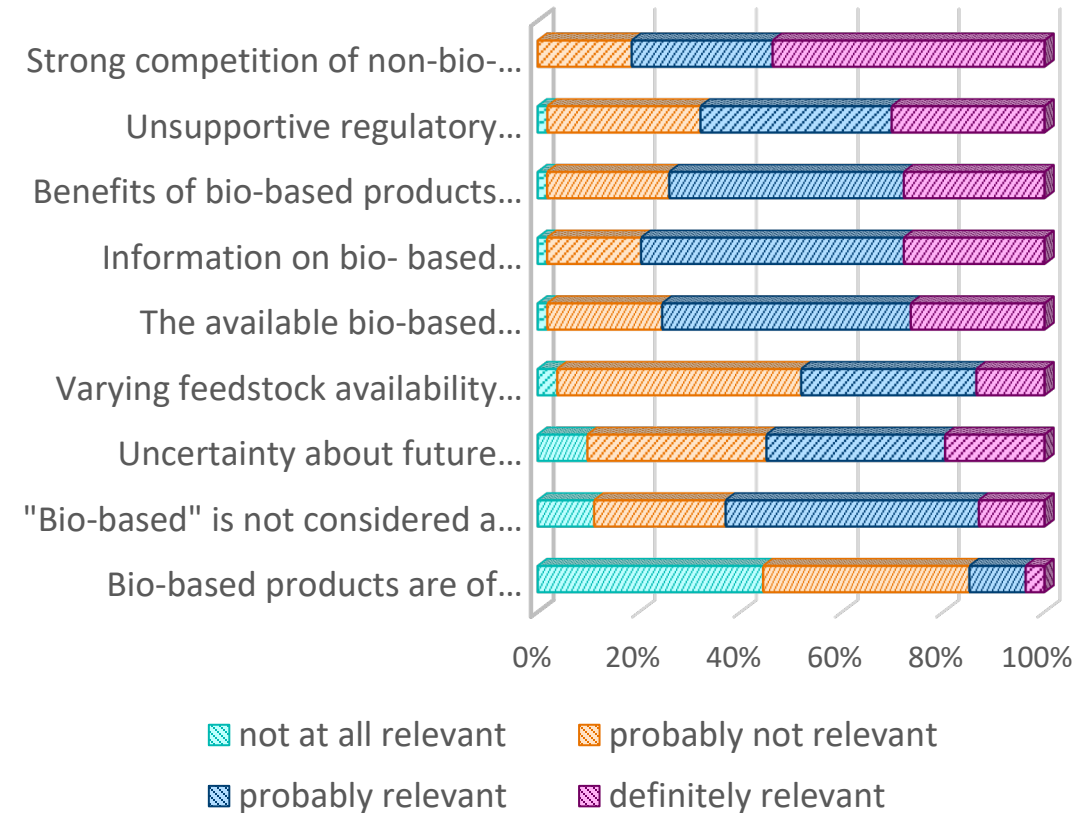
Less relevant barriers according to our survey results:

- Lower quality of bio-based products compared to fossil-based alternatives
- "Bio-based" is not considered a relevant product attribute
- Uncertainty about future regulations
- Varying feedstock availability and price volatility

# What are the most relevant barriers to the uptake of bio-based solutions in your region?

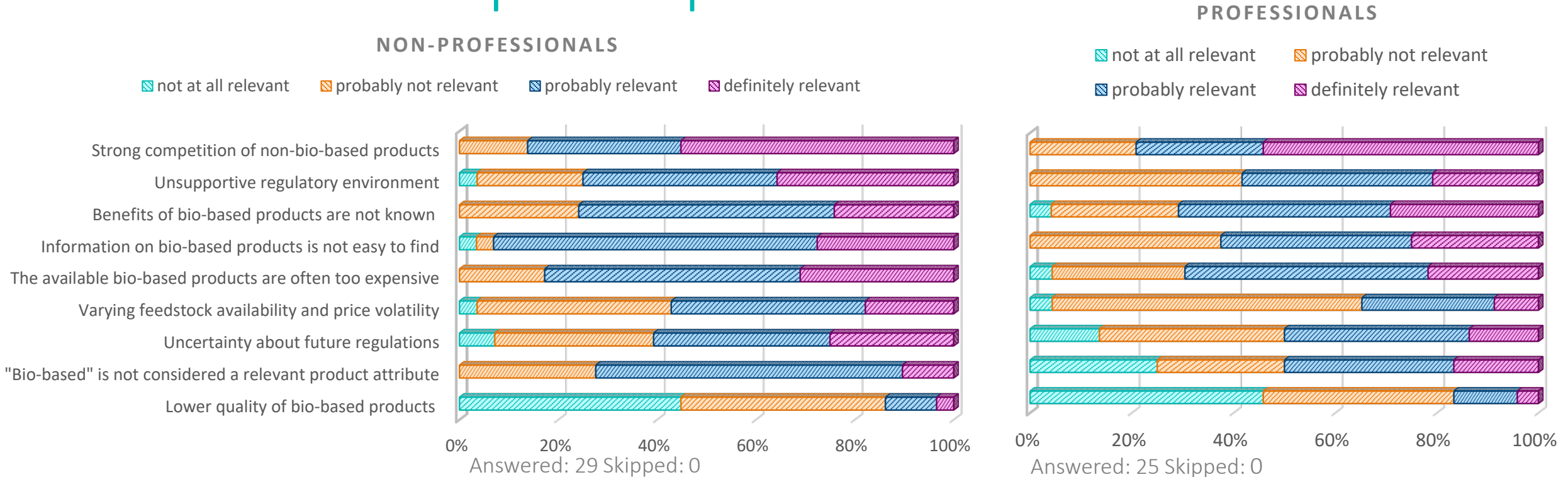
## Comments from survey participants:

- “Bio-based products are perceived to be too expensive. Often they are not, when you base your decisions on Total Cost of Ownership (TCO).” (Netherlands)
- “Not sure if bio-based is always the most sustainable solution e.g. synthetic fuels vs. electric cars. ==> high complexity, makes it hard for procurers to identify most sustainable solution. Procurers also often only create tenders, but decisions what to buy is made on a higher level.” (Austria)
- “The advantages also in terms of useful life etc. are often unknown.” (Netherlands)





# Barriers for the uptake of bio-based solutions in public procurement



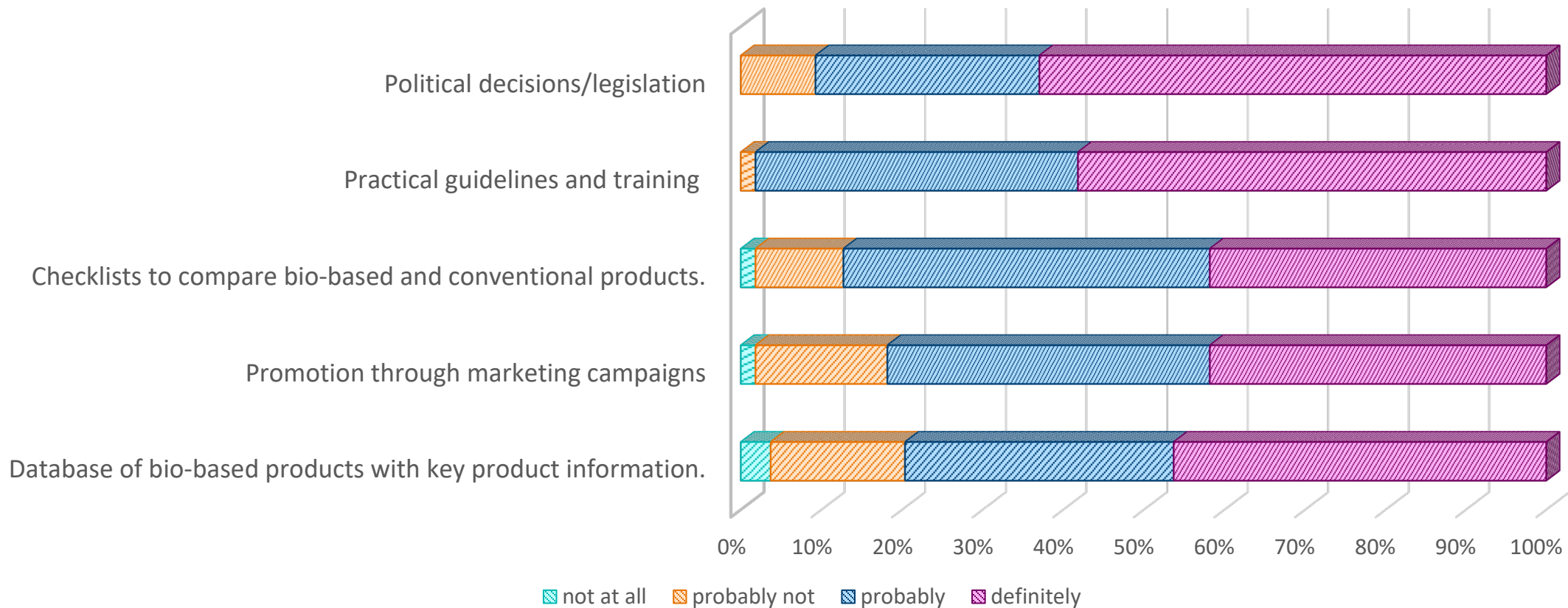
Overall, similar tendencies are present between non-professionals and professionals in regards to barriers for bio-based solutions in public procurement, although non-professionals generally estimate the possible barriers as more relevant than the professionals!

The fact that „bio-based is not considered a relevant product attribute“ is assessed as less relevant of a barrier between professional procurers could hint, that measures are undertaken to promote bio-based solutions in public procurement, that non-professionals might not be aware of.

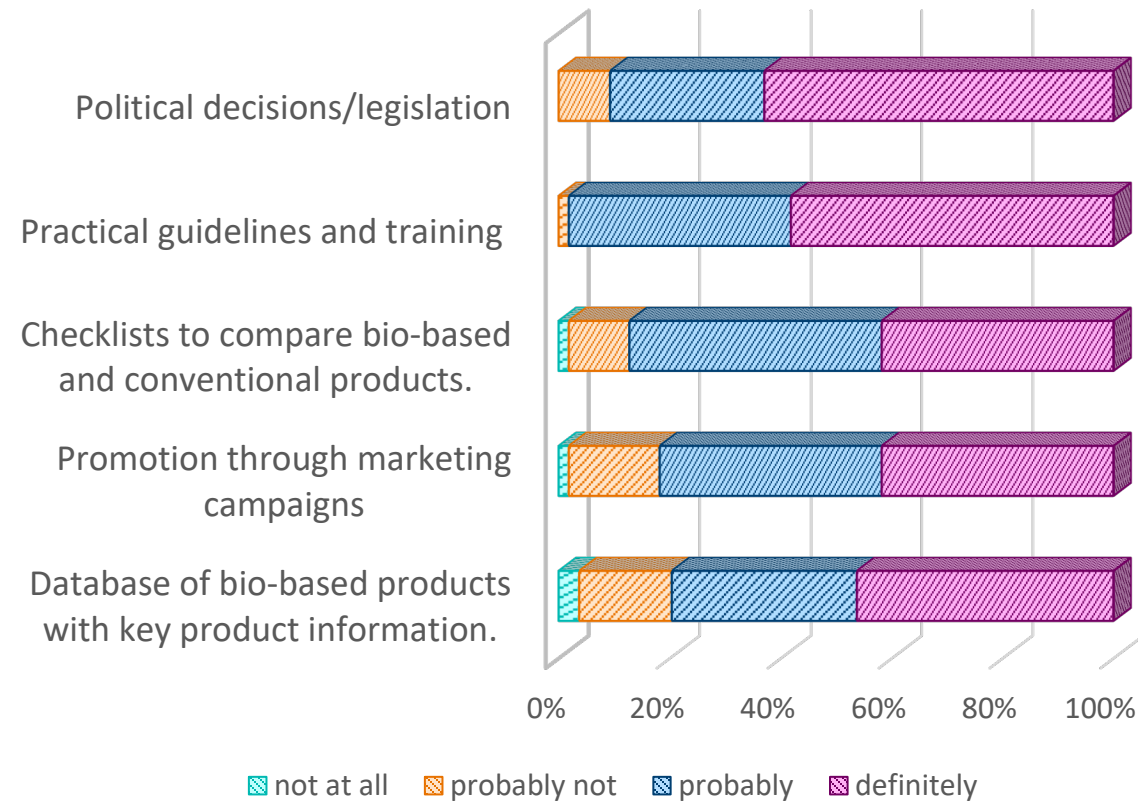
# What are drivers for the uptake of bio-based solutions in public procurement?

Answered: 55

Skipped: 1



# How would you promote bio-based products in public procurement in your region?

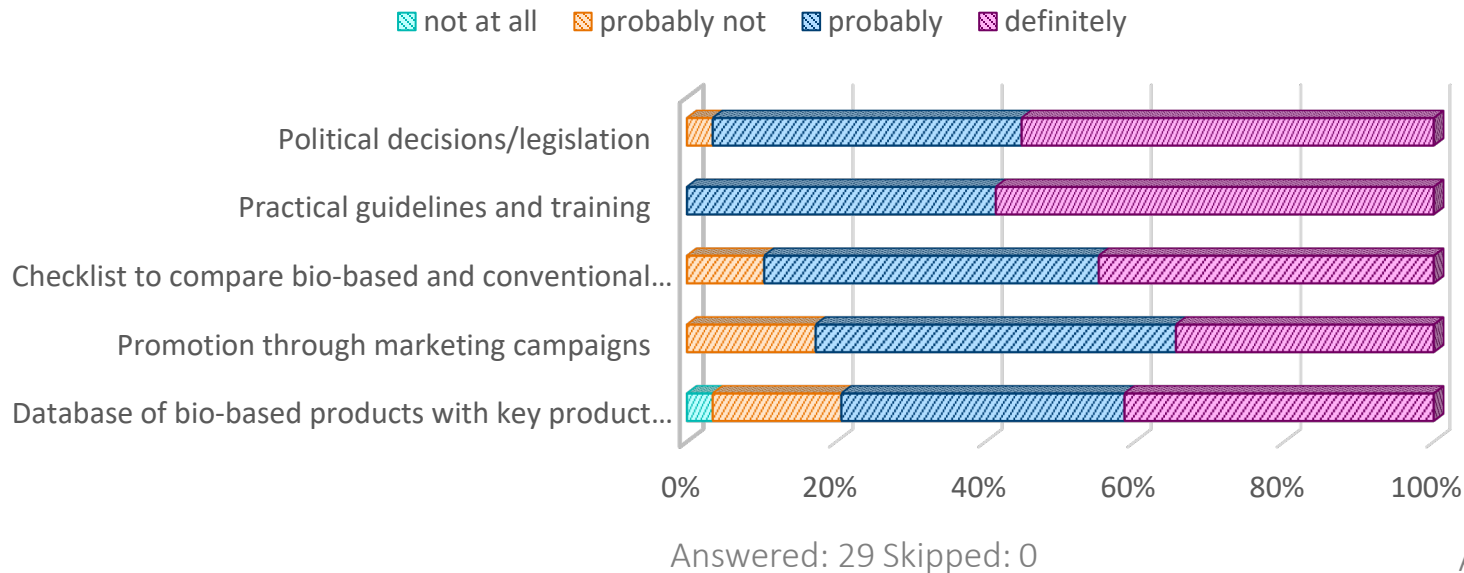


## Comments from survey participants:

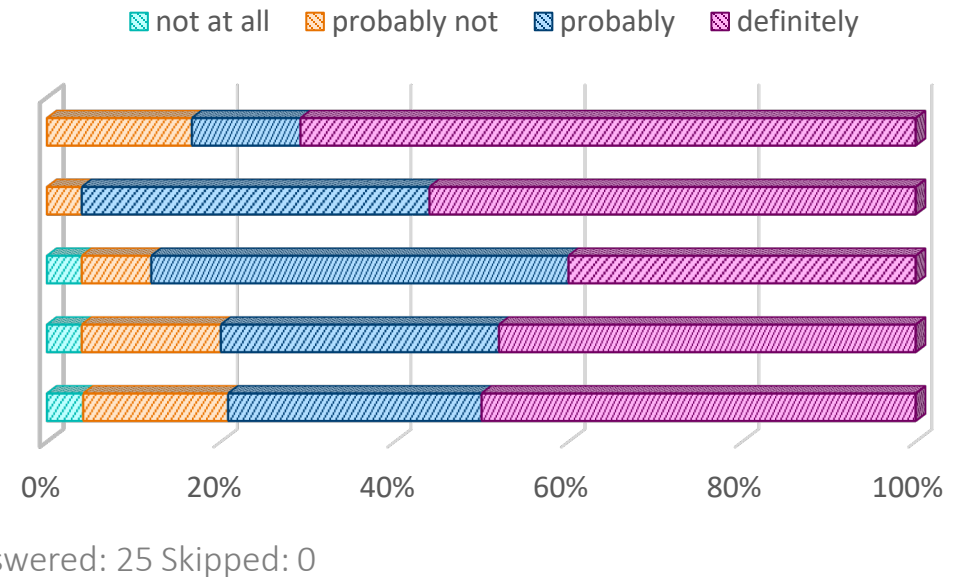
- “I don't think we should focus on 'bio-based vs fossil based' but bioeconomy should be part of a broader strategy for regional growth as it strengthens regional collaboration and can create new value chains and opportunities. Bioeconomy should be part of the regional sustainability and growth strategy.” (Greece)
- “A database with certified bio-based products is useful for buyers.” (Netherlands)
- “LCAs must be made available to better inform decisions.” (Belgium)

# What are drivers for the uptake of bio-based solutions in public procurement?

## NON-PROFESSIONALS



## PROFESSIONALS



Similar tendencies are present between non-professionals and professionals, although professionals put more emphasis on political decisions and legislations to promote bio-based products via public procurement.





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