

BioTrade2020plus

Supporting a Sustainable European Bioenergy Trade Strategy

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Report on Set-up and Engagement of Working Groups (M12)

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The BioTrade2020plus Project

Objectives

The main aim of BioTrade2020plus is to provide guidelines for the development of a **European Bioenergy Trade Strategy for 2020 and beyond** ensuring that imported biomass feedstock is sustainably sourced and used in an efficient way, while avoiding distortion of other (non-energy) markets. This will be accomplished by analyzing the potentials (technical, economical and sustainable) and assessing key sustainability risks of current and future lignocellulosic biomass and bioenergy carriers. Focus will be placed on wood chips, pellets, torrefied biomass and pyrolysis oil from current and potential future major sourcing regions of the world (Canada, US, Russia, Ukraine, Latin America, Asia and Sub-Saharan Africa).

BioTrade2020plus will thus provide support to the use of stable, sustainable, competitively priced and resource-efficient flows of imported biomass feedstock to the EU – a necessary pre-requisite for the development of the bio-based economy in Europe.

In order to achieve this objective close cooperation will be ensured with current international initiatives such as IEA Bioenergy Task 40 on “Sustainable International Bioenergy Trade - Securing Supply and Demand” and European projects such as Biomass Policies, S2BIOM, Biomass Trade Centers, DIA-CORE, and PELLCERT.

Activities

The following main activities are implemented in the framework of the BioTrade2020plus project:

- Assessment of **sustainable potentials of lignocellulosic biomass** in the main sourcing regions outside the EU
- Definition and application of sustainability criteria and indicators
- Analysis of the **main economic and market issues of biomass/bioenergy imports** to the EU from the target regions
- Development of a dedicated and **user friendly web-based GIS-tool** on lignocellulosic biomass resources from target regions
- **Information to European industries** to identify, quantify and mobilize sustainable lignocellulosic biomass resources from export regions
- **Policy advice on long-term strategies** to include sustainable biomass imports in European bioenergy markets
- **Involvement of stakeholders** through consultations and dedicated workshops

More information is available at the BioTrade2020plus website: www.biotrade2020plus.eu

About this document

This report corresponds to D6.2 – M12 – Report on Set-up and Engagement of Working Groups (M12). It has been prepared by: WIP.

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Collaborations	All BioTrade2020plus partners

Dissemination Level		
PU	Public	X
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	

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1. Stakeholder Involvement within BioTrade2020plus

BioTrade2020plus will ensure cooperation with other European, international and national initiatives and with the key stakeholders in the field. The expected benefits are enhanced knowledge of policymakers, industrial stakeholders, NGOs, biomass standardization and certification organizations and other key actors to help defining long-term strategies to establish sustainable biomass trade from third countries to the EU in 2020 and beyond.

In order to ensure efficient involvement of international experts and stakeholders throughout the duration of the project, three stakeholder working groups are established on the following topics in close cooperation with representatives of the BioTrade2020plus consortium (see section 6 of this document).

- WG1: Biomass importers and end-users (WG lead: DLO, WIP)
- WG2: Biomass producers and exporters (WG lead: IINAS, Imperial, WIP)
- WG3: Long-term strategies and support frameworks (WG lead: VITO, WIP)

The stakeholder working groups will be launched with a first telephone conference and regular (at least bi-annual) telephone conferences will be organised during project implementation (Project duration: March 2014 – August 2016).

It is anticipated that up to 10 stakeholders will participate in each telephone conference with the main aim of sharing and collecting information on the different topic areas.

At the BioTrade2020plus kick-off meeting the following procedure for the establishment of stakeholder working groups was agreed upon:

1. Identification of potential stakeholders for the three working groups by all consortium partners
2. Elaboration of supporting documents for the invitation of stakeholders, consisting of:
 - a. Document with background information on each working group
 - b. Draft invitation letter for each working group
 - c. Letter of Interest (for signature by interested stakeholders)
3. Agreement on priority stakeholders “to be invited” to join the working groups
4. Invitation of stakeholders (via email by the respective consortium partners)

The first round of stakeholder invitations has been initiated in May 2014 and stakeholders are being continuously contacted and invited by BioTrade2020plus consortium partners.

The current status of the BioTrade2020plus stakeholder database is presented as Annex 0 to the present report.

2. Focus of BioTrade2020plus Stakeholder Involvement

Today in the EU, the cost-effective achievement of existing and future bioenergy targets set in the legislation implies that in addition to using domestic sustainable and cost-competitive biomass potentials, European markets will also (partly) rely on sustainable and cheap(er) imports of biomass.

Some well-positioned regions of the world are already playing a role in supplying biomass for bioenergy to the European markets and could become increasingly relevant in the near future.

Within **Working Group 1 of the BioTrade2020plus project** specific focus will be placed on the following topics:

- Future demand of lignocellulosic biomass imports into European markets
- Promising market sectors within the bio-based economy
- Cost targets of imported biomass
- Quality requirements of imported biomass
- Sustainability requirements of imported biomass

Within **Working Group 2 of the BioTrade2020plus project** specific focus will be placed on the following topics:

- Sustainable potentials of lignocellulosic biomass in major sourcing regions (Canada, US, Russia, Ukraine, Latin America, Asia and Sub-Saharan Africa)
- Main biomass feedstock for export to EU (wood chips, pellets, torrefied biomass and pyrolysis oil)
- Competitive uses in sourcing regions
- Potential costs and quality specifications of exported biomass feedstock
- Land use change and indirect land use change
- Sustainability concerns in sourcing regions
- National and international policies affecting biomass trade

Within **Working Group 3 of the BioTrade2020plus project** specific focus will be placed on the following topics:

- EU level and EU Member States' policies affecting lignocellulosic biomass trade
- Sustainability concerns in importing and sourcing regions
- Strategies and policies in sourcing regions (1) in relation to biomass trade, (2) to ensure sustainable production of biomass, (3) to promote domestic biomass use (energy or other applications)
- Opportunities and barriers for international biomass trade
- Key principles for sustainable trade
- Long-term strategies and support frameworks in relation to biomass trade

3. Role of Members of BioTrade2020plus Working Groups

The members of the BioTrade2020plus working groups are selected on the basis of their personal capacity and expertise, and as representatives of their organisations.

They are encouraged to be members of the working groups through an invitation letter forwarded together with the present following information document.

Expectations from Members of BioTrade2020plus Working Groups

Members of the BioTrade2020plus **Working Group 1 – Biomass importers and end-users** - are invited to provide information and advice on the following topics:

- Main stakeholders and key actors involved
- National and international initiatives
- Market prospects of lignocellulosic biomass imports (by sector)
- Quality and cost requirements of imported biomass
- Existing and planned sustainability certification schemes
- Public perception and public acceptance
- Development of policies and long-term strategies

Members of the BioTrade2020plus **Working Group 2 – Biomass producers and exporters** - are invited to provide information and advice on the following topics:

- Main stakeholders and key actors involved
- National and international initiatives
- Sustainable potentials of lignocellulosic biomass in major sourcing regions
- Competitive uses in sourcing regions
- Quality and cost of exported biomass
- Existing and planned sustainability certification schemes
- Public perception and public acceptance in sourcing regions
- Policies and long-term strategies for international biomass trade

Members of the BioTrade2020plus **Working Group 3 – Long-term strategies and support frameworks** - are invited to provide information and advice on the following topics:

- Main stakeholders and key actors involved
- Existing policies, both in the EU and in the main sourcing regions, which impact international biomass trade
- (Perception of) sustainability concerns of biomass production in the main sourcing regions
- Policies and strategies in the sourcing regions on the promotion of domestic biomass use (e.g. for energy or transport fuels) and on sustainability requirements for (lignocellulosic) biomass production
- Potential risks and impacts of policy changes in these regions

- Opportunities and barriers for international biomass trade, and the way these could be addressed through policies and regulatory measures
- Key principles for sustainable trade, e.g. in terms of sustainability, resource efficiency and avoiding market disturbances (in sourcing and destiny areas)
- Recommendations for long-term strategies and support frameworks in relation to biomass trade

Furthermore, members of the working group will be invited to address specific issues in the field of sustainable biomass trade brought to the forum by representatives of the BioTrade2020plus consortium.

Activities of BioTrade2020plus Working Groups

Members of the BioTrade2020plus Working Groups are invited to participate in the following project activities:

- Regular (at least bi-annual) telephone conferences
- Project workshops (upon availability)
- Final BioTrade2020plus international conference (upon availability)

Invitations, background information and a detailed agenda of the specific issues to be discussed will be provided to all working group members at least 14 days prior to the telephone conference.

Information on BioTrade2020plus project workshops and the final project conference will be distributed to all working group members well in advance.

Material is discussed in BioTrade2020plus Working Groups on the basis that it is confidential to the group. The content of the Working Group telephone conference minutes should also be treated with confidentiality. Findings from the project may be disseminated informally in advance of publication, providing that there is clear agreement with the partners that this is appropriate.

4. Membership Status of BioTrade2020plus Working Groups

This section presents an overview of the current (February 2015) membership status of the stakeholder groups established in the framework of the BioTrade2020plus project. The detailed status of the BioTrade2020plus stakeholder database is presented as Annex 0 to the present report.

4.1 Overview of Membership Status

Table 1 presents an overview of the membership status (11 February 2015) of the three BioTrade2020plus working groups with respect to (generally) identified stakeholders, stakeholders invited, stakeholders who have confirmed (orally or by email) their interest to join working groups, as well as stakeholders who have already signed and submitted a Letter of Interest to contribute to BioTrade2020plus stakeholder activities.

The figure in brackets in the last column indicates the number of stakeholders who have confirmed their active participation in the working groups by joining one or more of the telephone conferences organized.

Table 1: Overview of BioTrade2020plus working group membership status (11 February 2015)

Working Group	Stakeholders identified	Stakeholders invited	Stakeholders interested	Signed Letters of Interest
WG 1	52	30	12	2
WG 2	54	25	15	2 (9)
WG 3	70	26	15	6 (10)

5. Activities of BioTrade2020plus Working Groups

This section presents activities performed in the framework of the three stakeholder groups established in the framework of the BioTrade2020plus project (Status: February 2015).

5.1 Overview of Working Group Activities

Table 5 presents an overview of activities (telephone conferences, workshops etc.) performed in the framework of the three stakeholder groups established in the framework of the BioTrade2020plus project (Status: February 2015).

Further details on each stakeholder working group activity are presented in the following subsections.

Table 5: Overview of BioTrade2020plus working group activities (11 February 2015)

Date	Working groups involved	Partners responsible*	Type of activity	Topics discussed
Up-coming	WG1,2,3	UU, IINAS, WIP	Telephone conference	Data collection for case studies in MZ, KE, IN
5 and 11 Dec. 2014; 27 Jan. 2015	WG1,2,3	IINAS, IC, WIP	Telephone conference	Sustainability indicators for biomass trade
27 Nov. 2014	WG1,2,3	VITO, WIP	Telephone conference	Key principles for sustainable biomass trade
24 Oct. 2014	WG1,2,3	VITO, UU, WIP	Stakeholder workshop, Brussels	Definition of sustainable export potentials Opportunities and risks connected with biomass trade Key principles for sustainable biomass trade
23-26 June 2014	WG1,2,3	DLO, CENER, WIP	Targeted interviews	Stakeholder feedback on tool requirements

* CENER will support WIP and rest of partners in the establishment and development of WG activities

5.2 Telephone conference on data collection for case studies – March/April 2015

Data collection telephone conferences are initially foreseen for the case studies in Mozambique, Kenya and Indonesia. These stakeholder telephone conferences will be jointly organized by IINAS, UU and WIP.

The final selection of date, the elaboration of background information and detailed agendas as well as the invitation of stakeholders to join these telephone conferences will be done in March/April 2015.

5.3 Telephone conference on key principles for sustainable trade – 27 November 2014

This stakeholder telephone conference was jointly organized by VITO and WIP on 27 November 2014.

In order to develop a long term trade strategy, a number of “key principles for biomass trade” need to be defined in agreement with different stakeholders. The objective of this telephone conference was thus to discuss potential key principles which have already been presented to participants of the international BioTrade workshop on 24 October 2014 in Brussels.

Participants: Working group members, Advisory Board Members, Stakeholders

- Marc Monsarrat, Rainforest Alliance, UK
- Gordon Murray, Wood Pellet Association of Canada
- Sara Anton Lopez, Abengoa, Spain
- Fanny-Pomme Langue, European Biomass Association (AEBIOM), Belgium
- Birger Kerckow, FNR, Germany
- Carlos Alberto Fernández López, IDAE, Spain
- Emanuele Bianco, GSE, Italy

Participants of the BioTrade2020plus consortium

- Luc Pelkmans, VITO, Belgium (Moderator)
- Dominik Rutz, WIP, Germany (Facilitator)
- Ines del Campo Colmenar, CENER, Spain (Rapporteur)
- David Sanchez Gonzalez, CENER, Spain
- Martin Junginger, Utrecht University, the Netherlands
- Leire Iriarte, IINAS, Spain
- Rocio Diaz-Chavez, Imperial College London, UK
- Thuy Mai-Moulin, Utrecht University, the Netherlands

Excused (have received the minutes):

- Evelyne Thiffault, University Laval, Canada
- Suani Teixeira Coelho, CENBIO, Brazil
- Jenny Walther-Thoss, WWF, Germany
- Geraldine Kutas, UNICA, Brazil
- Yves Ryckmans, Laborelec, Belgium
- Peter-Paul Schouwenberg, RWE-Essent, the Netherlands
- Brian Kittler, Pinchot Institute, US
- Giulio Volpi, European Commission, DG ENER

Minutes of this telephone conference are available.

5.4 Telephone conference on sustainability indicators – December 2014 and January 2015

A series of telephone conferences to collect stakeholder feedback on the developed sustainability indicators for biomass trade was organized on 5 December 2014, 11 December 2014 and 27 January 2015. These stakeholder telephone conferences were jointly organized by IINAS, IC and WIP.

The objective of these telephone conferences on “Sustainability issues - A perspective from sourcing regions” was to receive feedback from stakeholders on a number of key statements with respect to sustainability indicators developed within the BioTrade2020plus project:

- 1) Sustainability criteria and indicators and respective thresholds should apply to all feedstocks **regardless where they are consumed**
- 2) Sustainability requirements should be considered in the **full value chains** (e.g. include GHG emissions from processing or transport to the EU)
- 3) Sustainability requirements should not only apply to biomass for bioenergy but to **all end uses**
- 4) To assess sustainability, **different type of indicators** should be considered (minimum requirements, comparative to non-renewable reference, comparative to other biomass, descriptive)
- 5) **Ambition level of sustainability:** “basic set” (the minimum list of issues that should be considered) and “advanced set” (a more ambitious set of issues or thresholds) of sustainability requirements
- 6) Identify **practical implementation (or assurance) of sustainability** related issues

Telco Participants – Friday, 5 December 2014

Working group members, Advisory Board Members, Stakeholders

- Gibran Aleman on behalf of Roberto Parra--, Instituto Tecnológico de Monterrey, Mexico
- Warren Mabee, Queen’s University
- Nadine Block, Sustainable Forestry Initiative Inc

Participants of the BioTrade2020plus consortium

- Leire Iriarte, IINAS, Spain, (Moderator)
- Rocio Diaz-Chavez, Imperial College London, UK (moderator)
- Dominik Rutz, WIP, Germany (Facilitator)
- Ines del Campo Colmenar, CENER, Spain (Rapporteur)
- Uwe Fritsche, IINAS, Germany

Excused (have received the minutes)

- Roberto Parra Saldivar, Instituto Tecnológico de Monterrey, Mexico
- Kevin Vessey, Saint Mary's University
- Gordon Murray, Wood Pellet Association of Canada

Telco Participants – Thursday, 11 December 2014

Working group members, Advisory Board Members, Stakeholders

- Todd G Bush, Green Circle Bio Energy, USA
- Suani Coelho, University of São Paulo, Brazil
- Géraldine Kutas, UNICA, Brazil

Participants (consortium)

- Leire Iriarte, IINAS, li@iinas.org (Moderator)
- Rocio A Diaz-Chavez, Imperial College London (Moderator)
- Rainer Janssen, WIP (Facilitator)
- Ines del Campo Colmenar, CENER (Rapporteur)
- David Sanchez, CENER
- Luc Pelkmans, VITO
- Uwe Fritsche, Leire Iriarte, IINAS
- Martin Junginger, UU
- Thuy- Mai Moulin, UU

Excused (have received the minutes)

- Bah Saho, ECREEE
- German Aroca, Universidad Católica de Valparaíso
- Rubens Lamparelli, NIPE/UNICAMP, Brazil

Telco Participants – Tuesday, 27 January 2015

Working group members, Advisory Board Members, Stakeholders

- Kevin Vessey, SMU, Canada
- Jessica Brooks, USIPA, USA
- Jorge Hilbert, INTA, Argentina.

Participants of the BioTrade2020plus consortium

- Leire Iriarte, IINAS, Spain, (Moderator)



- Rocio Diaz-Chavez, Imperial College London, UK (Moderator)
- Rainer Janssen, WIP, Germany (Facilitator)
- Ines del Campo Colmenar, CENER, Spain (Rapporteur)
- Eduardo Otazu Vidart, CENER, Spain

Excused (have received the minutes):

- Mika Muinonen, Torrec Oy – Finland

Minutes of these telephone conferences are available.

5.5 International Workshop "Towards Sustainable International Biomass Trade Strategies" – 24 October 2014

This stakeholder workshop was jointly organized by VITO, UU, WIP and CENER. It took place on 24 October 2014 in Brussels, Belgium. Stakeholders were cordially invited to join this workshop which was co-organised by the BioTrade2020plus consortium and IEA Bioenergy Task 40.

This workshop aimed to bring people together to initiate discussions on how these trade strategies can be framed. The central points of discussion were (1) how to define sustainable export potentials, (2) which opportunities and risks are connected with biomass trade and how these can be addressed, and (3) which are the key principles that sustainable biomass trade should fulfil – one important point is the interaction between local use and exports in the sourcing regions.

6. BioTrade2020plus Working Group Contacts

The following contact persons are responsible for activities within the BioTrade2020plus stakeholder working groups.

Contact - BioTrade2020plus Working Group 1 – Biomass importers and end-users

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Contact - BioTrade2020plus Working Group 2 – Biomass producers and exporters

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Contact - BioTrade2020plus Working Group 3 - Long-term strategies and support frameworks

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7. Supporting Documents - Annexes

The following supporting documents for the establishment of BioTrade2020plus stakeholder working groups have been elaborated and presented as Annex to the deliverable report D6.2 (M3).

- (a) Annex 1 - Document with background information on WG1: Biomass importers and end-users
- (b) Annex 2 - Document with background information on WG2: Biomass producers and exporters
- (c) Annex 3 - Document with background information on WG3: Long-term strategies and support frameworks
- (d) Annex 4 – Invitation letter for stakeholders of WG1
- (e) Annex 5 – Invitation letter for stakeholders of WG2
- (f) Annex 6 – Invitation letter for stakeholders of WG3
- (g) Annex 7 – Draft Letter of Interest (LoI)

Furthermore, the current status of the BioTrade2020plus stakeholder database is presented in Annex 0 to this deliverable report.

8. BioTrade2020plus Consortium

CENER – National Renewable Energy Centre, Biomass Department, Spain

Project Coordinator BioTrade2020plus

Contact persons: David Sánchez González & Inés del Campo Colmenar

Imperial – Imperial College London, Centre for Environmental Policy, United Kingdom

Contact persons: Dr Rocio Diaz-Chavez

DLO – Alterra, Wageningen University and Research, The Netherlands

Contact persons: Dr Gert-Jan Nabuurs & Dr Berien Elbersen & Dr Wolter Elbersen

IINAS – International Institute for Sustainability Analysis and Strategy GmbH, Germany

Contact person: Dr Leire Iriarte & Uwe Fritsche

VITO - Flemish Institute for Technological Research, Belgium

Contact persons: Luc Pelkmans

UU - Utrecht University, Faculty of Geosciences, Energy & Resources, Copernicus Institute of Sustainable Development, The Netherlands

Contact persons: Dr Martin Junginger & Thuy Mai-Moulin

WIP- WIP Renewable Energies, Germany

Contact persons: Dr Rainer Janssen & Dominik Rutz

