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**Report on survey of programme owners**

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## Summary

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## Approval

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## EXECUTIVE SUMMARY

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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.

## 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 "*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 future platform; both in terms of content and members.

Specific objectives were:

- 1) To enhance the understanding of circular economy top priorities, more specifically the challenges encountered by POs 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 Outcomes of the online survey and telephone interviews

The questionnaire was made available online and by e-mail between January 29 and March 13, 2019. All CICERONE partners were informed beforehand and received instructions in advance. The final online response rate was 35 respondents, plus another 14 interviews were conducted by phone and sent in separately to complement the results. **This brought the total number of Programme Owners responses to 49.** All results are included in the final outcomes.

Taking into account that the development of the platform is moving more towards a specific target audience of Programme Owners, we are confident that these stakeholders were adequately represented in the survey for the following reasons:

- 60% of the respondents were national POs, the primary target audience for the platform, as circular economy programmes are currently, in majority, funded by national governments (70%, results from the research undertaken WP1). Regional and European level POs each represented 20%. A few municipalities, NGO, Universities and companies were represented, among others through different funding organisations.
- The geographical scope of programme owners surveyed span across 13 European countries: Belgium, Bulgaria, Estonia, Finland, Germany, The Netherlands, Romania, Sweden, Switzerland, as well as international stakeholders (ICLEI, EIT Climate-KIC and EIT Raw Materials). In Austria, Spain, Poland and Italy further surveys were conducted by telephone. This presents diversity both in terms of geographical outreach and level of advancement of circular economy programmes.
- The survey was exclusively addressing high-level owners of circular economy programmes, with a focus on national level as stated above. We are confident that the number of respondents to the initial survey is thus a good representation considered the potential number of Circular Economy programme owners.
- The survey and interviews were specifically targeting POs external to the CICERONE project, to gauge initial interest in a joint programming platform. The results act as a baseline for the CICERONE project's future work, more specifically in WP3, where knowledge and experience from the 24 project partners will complement these initial findings.

Lessons learned have been considered to optimise our future outreach to POs within the project:

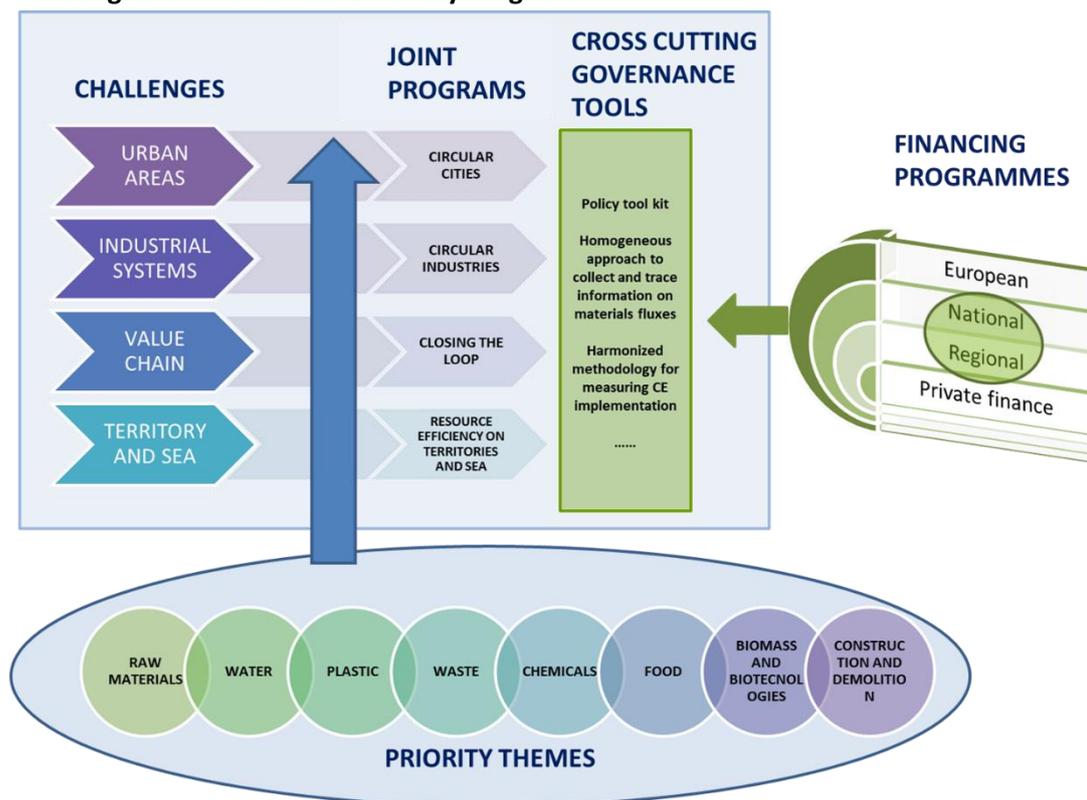
- The dissemination timeline of the survey could have benefitted from being parallel to the development of the value proposition of the platform: introducing the idea of a joint programming platform to an external audience without a concrete value proposition may have resulted in less participants than expected due to uncertainty.
- Seeking commitment to participate in the future platform may thus also have been too ambitious given the early developments of the project.

- The above points mere explain why a total of 84 individuals started responding to the survey but did not complete and submit it. Moreover, it is important to note that programme owners are often solicited to respond to such queries and may not have the human resources to be able to respond to all.

However, it is important to note that more than 80% of the surveyed POs 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.

We should note that at this stage of the project, and without a clear value proposition for the platform, it is a challenge to mobilise official commitment from POs to the platform. POs that expressed their interest were thus invited to sign up to our CICERONE stakeholder list to receive regular updates and invitations to workshops, and formed the basis for the PO ambassador/focus group managed by the project. A mobilisation phase to the platform will take place during the second half of the project, once a concrete offer for Programme Owners has been formulated.

### Priorities of Programme of Circular Economy Programmes



The design of the CICERONE project is based on the themes and challenges defined in the Circular Economy Action plan. These are framed under eight themes (*biomass, chemicals, construction and demolition, food, plastic, raw materials, waste and water*) building on four challenges (urban areas,

industrial systems, value chains and territory and sea). The respondents were given the option to list their top 3 priorities in circular economy or add additional ones.

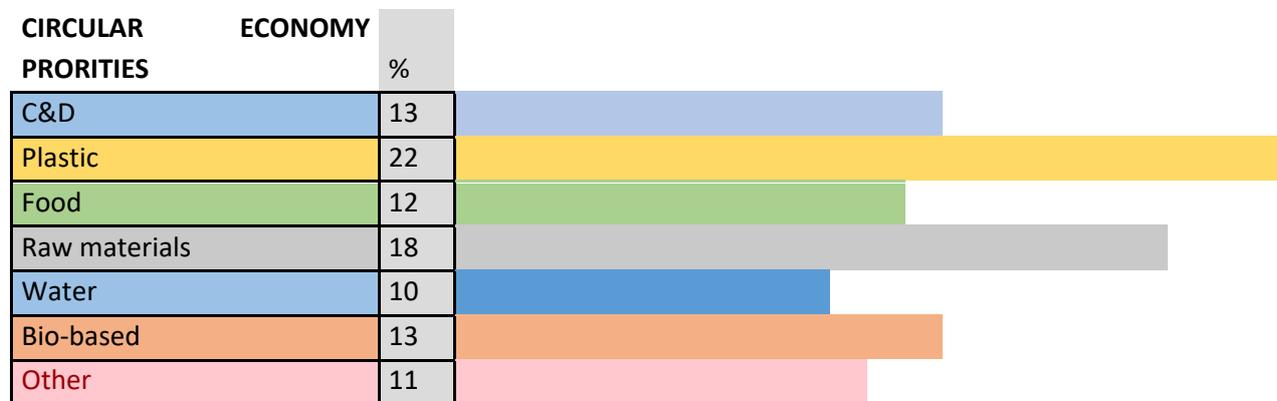


Figure 1 – PO priorities in %

Figure 1 gives an indication to the priorities of Programme Owners in European Member States. Plastic and Raw Materials are the top-priorities for a majority of European POs.

Based on the results, plastics were identified as a top-priority for a majority of European POs, shortly followed by raw materials. These themes show the largest potential for joint programming. This seems more or less to be in line with the findings of the in-depth survey in task 1.1 ‘European Benchmark’; but it is however important to note that the two are not directly comparable, as both surveys served a clear purpose: the initial survey would provide a snapshot of key policy priorities; versus the in-depth comparison in WP1 of ongoing CE programmes and projects to establish a benchmark. Both surveys were carried out in close cooperation, since they approached partly the same respondents.

A vast majority of respondents made use of the opportunity to name other priorities than listed. These priorities are of a different kind, more cross-cutting than theme-related. These were listed without further analysis at this stage and used in further profiling the future users of the joint programming platform within WP3. They will be brought forward as a longlist of PO-CE-related priorities, to further shape the Strategic Research and Innovation Agenda, and profile the future users of the joint programming platform within WP3.

Longlist of PO policy priorities:

- 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.

\*named 3 times or more

More than half of the of respondents base the design of their circular economy programme on scientific insights of their national universities and research institutions. Approximately 75% have access to this international knowledge, through international networks and 60% through participation in international projects. 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.

The above results complement the work carried out in CICERONE WP1, i.e. the benchmark of European Circular Economy programmes, providing guidance on key priorities to be included in the SRIA developed by the project. POs interviewed during this initial survey will also be contacted to provide feedback on the innovation priorities for circular research & innovation, and be engaged in reviewing the first draft of the SRIA when available.

In addition to the questionnaire, CICERONE partners also identified and approached 1 or 2 key circular economy programme-owners for an in-depth interview. The result was an extra 13 interviews, undertaken either by phone or in person. This 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 ideas for the development of the joint platform. The issues raised in the interviews – the “wicked problems” – are listed below. These are also presented as a longlist of issues for Owners of Circular Economy Programmes.

- There is a clear need for new policies to support sustainable regional development, decentralisation and to support local authorities in making use of the advantages of circular economy. Some respondents indicated that 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 target or specific enough their policy choices.
- There is a need for nationally defined criteria (benchmarks) for CE development, expected outputs and impact. There is a need for mandatory certificates/labels to certify the quality of CE businesses in the food industry (bio foods), construction industry, and energy efficiency, among others. Business associations are now, in some cases, voluntarily establishing and adopting such criteria/certificates.

- Governmental organisations should set a strong example for businesses and society, with circular procurement and public campaigns. They should also 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.

### **1.1.1 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
- Technologies and methods for incorporating waste products and materials from industries into other industries
- Reengineering
- Additive manufacturing
- Significant increase in waste reduction and recycling;
- Water consumption saving and use of local resources
- Increasing the efficiency in energy use
- New rules for increasing recycling rates on plastic.
- Introduction of bio-refining and biogas installations in order to reduce the impact of food production/consumption.
- New rules to stimulate water reusing and bio-refining and biogas installations in order to reduce the impact of greywater

## 2 POINTERS

### 2.1 Pointers for the Strategic Agenda

Results from the survey showed that 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-ladder<sup>1</sup> provides useful guidance when dealing with the technical aspects of a circular transition.

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.

Other relevant needs include:

- 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.
- extra attention for non-technical knowledge: such as how to create a resource efficient society, influence behaviour and establish structural cooperation between actors.
- 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

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<sup>1</sup> refuse, rethink, reduce, reuse, repair, refurbish, remanufacture, repurpose, recycle and recover

- 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
- Building on linkages between the principles of Sustainable development and principles of CE in designing new policy instruments and practical tools to aid CE businesses
- Developing policy instruments to address Circular Economy priorities
- Developing City Indicators for Circular Economy at city level (as part of a system for monitoring and evaluation of CE business and public initiatives)
- Addressing the knowledge gap among urban and regional policy-makers on the potentials and challenges of the value chain for bio resources
- Innovative forms of urban management at local level to promote a transition towards a circular city and society, with a focus on urban circular re-use of space and buildings
- Highlights on the connection between the EU Urban Agenda and the 2030 Agenda for Sustainable Development, on sustainable cities and communities.

## 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.)
- The Platform should provide thematic/sectoral information to help fill in knowledge gaps, esp. in countries such as Bulgaria which has no advanced practices in CE
- The platform would 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 keywords-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)
- Provide information about past/ongoing projects in CE sectors
- Use the platform to build a EU (European) network of businesses, key actors and stakeholders (public bodies, NGOs, etc.) active in CE
- Give visibility to leading actors and experts in CE and up-and-coming experts and organizations from catch-up countries/regions
- 1) systematically mapping potential Circular Economy opportunities existing in key CE sectors in the EU and Central and Eastern Europe, 2) collecting best practices from the partners exchange. In addition, examples of projects and guides to assist cities in accessing funding for circular economy projects will be very helpful.

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

The above results enabled the project to gain a clear overview of the specific needs and challenges for Programmes Owners to make their CE programming more efficient. This was integrated into the consolidation of PO needs, drive, incentives and challenges coordinated by WP4, feeding into the first steps of the value proposition for the platform developed within WP3. To avoid stakeholder fatigue, the CICERONE project used the results of the PO survey as key inputs for the development of the offer of the platform, challenged and tested by POs within the consortium and Advisory Board.



Figure 1 Overview of stakeholder interests

## CONCLUSIONS

The survey has provided key insights to the needs and concerns of POs on different levels throughout Europe. The outcomes of the survey are particularly relevant for WP2 and WP3 and will be used and interpreted by partners throughout the CICERONE project.

The information on current programmes in Member States and Regions adds to the outcomes of the survey in WP1, enabling the identification of common ground for future joint research. The pointers for the Strategic Research and Innovation Agenda were used in the early stages of shaping the Circular Economy Strategic Research & innovation Agenda (SRIA) within WP2, more specifically to align identified priorities with those included in the agenda, and support the prioritisation of innovation

needs. The pointers for the Platform were used as a basis for the value proposition work within WP3; giving input to the platform design and governance. The POs that expressed interest will be personally contacted by the network managers in WP4.

Key findings of the survey show a large difference in technology use, organisation and culture between Member States and Regions – that needs to be taken into account when building an efficient joint programming platform and reflected in the governance model. The survey also confirmed research within WP1 to identified most POs operate on a national level, and the majority are specifically involved in transforming industry.

CICERONE's mission and activities seem largely in line with the needs of POs for practical support and tailored information management, however there is a need to further develop the platform and joint programming concept when engaging with external POs, in order to gain more traction and buy-in.

## **Annex 1 – Online questionnaire**

The below annex presents the full online questionnaire for programme owners. The questionnaire was developed in collaboration with all CICERONE WP, and refined by WP\$ partners to ensure its user friendliness to engage stakeholders.

# CICERONE

Online Questionnaire

## Challenges: complexity of accelerating the transition to a circular economy:

### ONLINE QUESTIONNAIRE for PROGRAMME OWNERS

CICERONE H2020 is building a joint programming platform for circular economy projects. To this end, we kindly ask for your input to better understand your priorities for the circular economy transition, to ensure it will support your objectives in the best possible way. The questionnaire will take approx. 10 minutes of your time. If you have any questions, please get in touch with the CICERONE contact person in your country or [Antoinet.smits@rvo.nl](mailto:Antoinet.smits@rvo.nl)

Thank you for your cooperation!

	Programme Owners Please indicate your geographic level :	<input type="radio"/> International <input type="radio"/> National <input type="radio"/> Regional <input type="radio"/> Local
1	Please fill in your name, position and organisation circular economy programme (s):	<input type="radio"/> .. <input type="radio"/> .. <input type="radio"/> ..
2	Please fill in the name of your circular economy programme(s)	<input type="radio"/> ... <input type="radio"/> ..
3	What are your top 3 priorities for Circular Economy ?	1. Construction & Demolition 2. Plastic 3. Food 4. Raw materials 5. Water 6. Bio-based materials 7. ... 8. .. 9. ..
4	Do you foresee any breakthroughs in any of these areas ?	<input type="radio"/> No <input type="radio"/> Yes, namely, ..... ..... .....



5	Did you make use of scientific insights and evidence-based approaches in the design of your Circular Economy programme ?	<input type="radio"/> Yes <input type="radio"/> No If yes, from which source ? <input type="radio"/> research centers <input type="radio"/> universities <input type="radio"/> other, ..
6	Did you use international available knowledge in developing your programme ?	<input type="radio"/> Yes <input type="radio"/> No  If not, because (more answers possible): <input type="radio"/> lack of funds <input type="radio"/> lack of organisation <input type="radio"/> administrative burden <input type="radio"/> lack of time <input type="radio"/> too complicated <input type="radio"/> other ..  If yes, from which source <input type="radio"/> international projects, such as ... <input type="radio"/> international networks, such as.... <input type="radio"/> Other:.... <input type="radio"/>
7	Are you making use of European funding opportunities in your programme (multiple answers possible)	<input type="radio"/> Yes <input type="radio"/> No If yes, to which funding programme did you apply ? <input type="radio"/> H2020 <input type="radio"/> Interreg <input type="radio"/> LIFE <input type="radio"/> Other, .. <input type="radio"/> Other, ..  If not, what are the reasons ? <input type="radio"/> Process is too complicated <input type="radio"/> Lack of time <input type="radio"/> No knowledge of procedures <input type="radio"/> No knowledge of organisations <input type="radio"/> Not relevant for our programme <input type="radio"/> Other:.....
8	Are you involved in international Circular Economy projects and/or networks ?	<input type="radio"/> Yes <input type="radio"/> no if yes, which networks/projects: <input type="radio"/> EREK



		<ul style="list-style-type: none"> <li><input type="radio"/> SCREEN</li> <li><input type="radio"/> Eco Innovera</li> <li><input type="radio"/></li> </ul> <p>Other,</p>
9	Do you see added value in the CICERONE platform to decrease fragmentation and increase the use of research results ?	<ul style="list-style-type: none"> <li><input type="radio"/> Yes, because ....</li> <li><input type="radio"/> No, because ....</li> </ul>
10	Which areas for cooperation would you recommend to the platform ? (only for respondents who said yes on previous question)	<ul style="list-style-type: none"> <li><input type="radio"/> Practical cooperation</li> <li><input type="radio"/> The complexity of content and process</li> <li><input type="radio"/> Systemic approaches</li> <li><input type="radio"/> Other</li> </ul>
11	Would you be willing to be involved in the further development of the platform?	<ul style="list-style-type: none"> <li><input type="radio"/> Yes</li> <li><input type="radio"/> No</li> </ul> <p>If yes, will you express your interest by subscribing to the CICERONE online platform?</p> <ul style="list-style-type: none"> <li><input type="radio"/> Yes</li> <li><input type="radio"/> No</li> </ul>
12	We would like to contact you about the further development of the platform. If you agree, please indicate which way is best and fill in your contact information	<ul style="list-style-type: none"> <li><input type="radio"/> Email address</li> <li><input type="radio"/> Phone number</li> <li><input type="radio"/> I don't agree</li> </ul>
13	Would you like to express your interest by subscribing to the CICERONE online platform	<ul style="list-style-type: none"> <li><input type="radio"/> Yes</li> <li><input type="radio"/> No</li> </ul>
14	Do you have any additional Remarks?	
	Thank you and if you have expressed your interest, sign up to our mailing list	<a href="https://cicerone-h2020.us19.list-manage.com/subscribe/confirm-captcha">https://cicerone-h2020.us19.list-manage.com/subscribe/confirm-captcha</a>

Thank you for your time and response!



If you have expressed your interest to participate in the development of the joint programming platform and agenda, we will keep you updated of developments and enable you to give input on a regular basis.

