



PREP-IBISBA

Industrial Biotechnology Innovation and Synthetic Biology Accelerator Preparatory Phase

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Report on the potential user community

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1 Summary

The deliverable reports on the action plan and its implementation developed by the IBISBA consortium to identify and quantify the global IBISBA potential user community, irrespective of the legal status of its components (e.g. public or private sectors) and the access mode to the infrastructure (e.g. subsidised or full-cost-paying access).

The global IBISBA potential user community is reported as an infographic showing its geographical distribution and legal status. The study has thus led to the identification of five main user groups from the private and public sectors, namely **SMEs, Large Companies, Companies (unspecified size), Academia & Public Labs, and Other.**

2 Introduction

IBISBA is a pan-European research infrastructure dedicated to industrial biotechnology. It federates Europe's leading public-operated research facilities into a coordinated business environment from 10 European Countries (France, Spain, Italy, The Netherlands, Germany, Belgium, Greece, Finland, Ireland and the United Kingdom) to deliver low carbon and low environmental footprint biotechnologies (Figure 1).

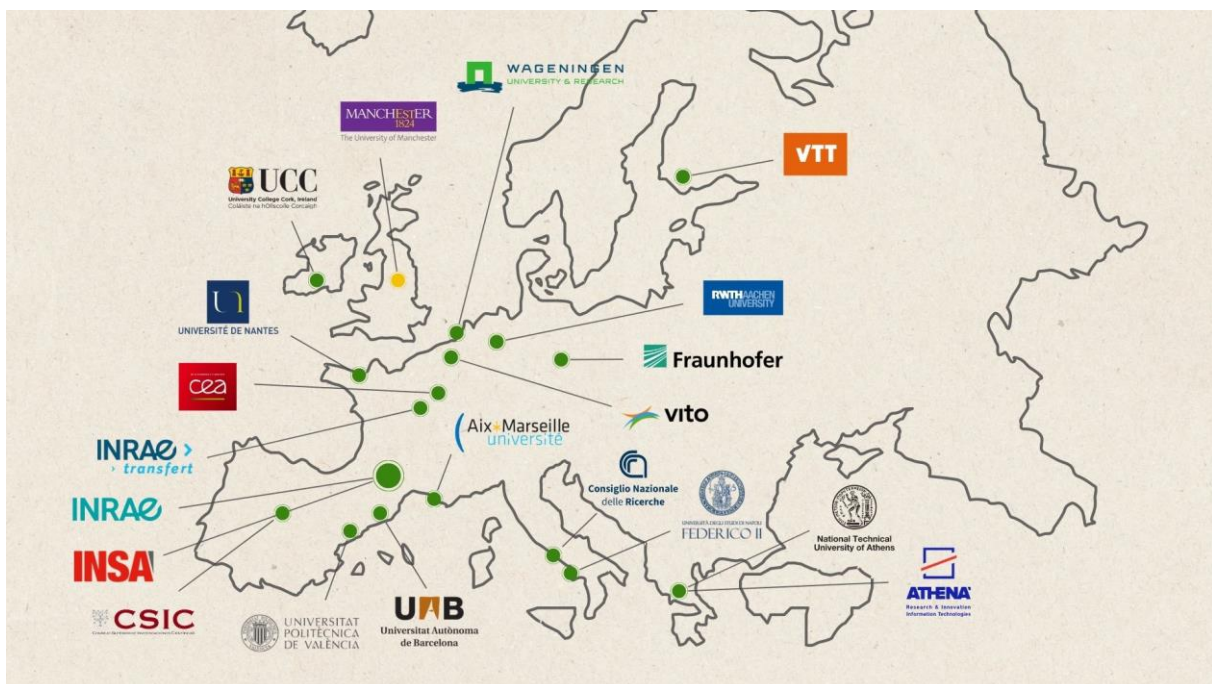


Figure 1. IBISBA's founding partners are present in nine member states and the UK.

The mission of IBISBA is to provide a single access point to researchers from academia and industry across the globe to integrated services for end-to-end bioprocess development. By federating European expertise and state-of-the-art research and development facilities, IBISBA promotes standardisation and best data practices as core elements of service reproducibility and interoperability. In doing so, IBISBA accelerates the production and translation of cutting-edge knowledge into innovation for biomanufacturing.

3 Results

3.1 Identifying and quantifying IBISBA's potential user community

IBISBA's potential user community was identified and quantified irrespective of the modalities users employ to gain access to the infrastructure (i.e., irrespective of whether their use is full paying or subsidized under the transnational access scheme), and whether users are from the public or private sectors. On this basis, data was collected using data from IBISBA's TNA programme, by consulting public databases of European-funded projects and initiatives linked to the same R&D&I ecosystem and sectoral industry as IBISBA.

These databases include:

- IBISBA TNA user applications (calls 1-5, 2018-2021)
- European Cluster Collaboration Platform (<https://clustercollaboration.eu>)
- Bio-based Industries Joint Undertaking (BBI-JU) submitted projects, calls 2019-2020 (<https://www.bbi.europa.eu/projects>)
- ERA-Net CoBioTech funded projects, calls 2019-2020 (<https://www.cobiotech.eu/>)

Although the scope of the investigation was limited to EU-funded projects, these also revealed users from Associated and Third Countries, including Eastern European Countries, United Kingdom, United States, Latin America, Africa, Asia and Australia.

3.1.1 IBISBA TNA user applications (calls 1-5, 2018-2020)

All applicants who submitted a proposal in response to the IBISBA TNA calls were considered potential users of IBISBA, irrespective of whether their proposal was successful or not.

An interactive infographic has been created and published online (see Chapter 3.3 [Visual representation of the user community](#))

3.1.2 European Cluster Collaboration Platform (ECCP)

[The platform](#) is an initiative of the European Commission funded by the EU programme for the Competitiveness of Enterprises and SMEs (COSME). Its mission is to connect cluster organisations across Europe to one another. Clusters were found by exploring the database containing relevant stakeholders linked to IBISBA's industrial ecosystem, which was defined by selecting specific parameters. These were:

- **Zone:** EU27 + Third Countries and territories
- **Sectorial Industry (NACE2):** Manufacturing (C10, C11, C12, C20, C21, C22)
- **S3 EU Priority Area:** Bio fuels & energy efficiency, Advanced manufacturing systems, Advanced materials, Industrial Biotechnology, Bioeconomy, Climate change, Resource efficiency, Sustainable energy & renewables, Sustainable land & water use, Sustainable production & consumption, Waste management.

The data is included in the interactive infographic published online (see Chapter 3.3 [Visual representation of the user community](#))

3.1.3 Bio-based Industries Joint Undertaking (BBI-JU) submitted projects, calls 2019-2020

BBI-JU is a public-private partnership between the EU (H2020 funding programme) and the Bio-based Industries Consortium (BIC). The initiative provided funding for projects in the bio-based industries sector for the 2014-2020 period.

Data was collected by directly contacting the BBI Consortium, which provided a complete list of all the projects submitted for each call launched over the years, irrespective of whether they were funded. To ensure maximum relevance to the purpose in hand, only the most recent calls (i.e., those from the period 2019 to 2020) were considered.

The data is included in the interactive infographic published online (see Chapter 3.3 [Visual representation of the user community](#))

3.1.4 ERA-Net ERA CoBioTech funded projects, calls 2019-2020

The ERA-Net Cofund on BioTechnologies (CoBioTech) is an EU H2020-funded project with the key aim of bolstering the European Research Area (ERA) by promoting systems biology and synthetic biology as Key Enabling Technologies (KET) to accelerate research and innovation in industrial biotechnology.

Successful proposals from the first (2019) and second (2020) calls were identified from the [ERA CoBioTech](#) as IBISBA potential users.

The data is included in the interactive infographic published online (see Chapter 3.3 [Visual representation of the user community](#))

3.2 Creating a full list of the user community

The raw data collected from the different sources were arranged in individual MS Excel data sheets ([Annex I – List of IBISBA potential users](#)). Each table was then analysed and organised to maintain only useful information related to the name of the institution, country, legal status (e.g., SME) and public contact. Moreover, to provide a consistent description of data entries across the tables, the data were normalised, duplicates were removed, and unique identifiers were created to indicate similar user-types, especially for their legal status (Legal Status in Annex I). Accordingly,

organisations originally registered as higher education institutions, public bodies, research organisations and academia, were all assigned to the category **Academia & Public Labs**. Likewise, four other user groups were identified: **SMEs**, **Large Companies**, **Companies (unspecified size)**¹, and **Others**², rendering the different datasets comparable. Finally, the data were merged into a single Excel data sheet containing the full list of the user community, which amounted to about 8,000 potential users (extract in Table 1, Normalised data Full List in [Annex I – List of IBISBA potential users](#)).

Clusters were listed as such and not as their various components to simplify their identification and contact. However, the various user-types within the clusters were counted, normalized, and summed to the list of potential users, bringing the total number up to about eight thousand.

Table 1. Extract from the list of IBISBA potential users.

Name	Legal Status	Country
A4F ALGAFUEL SA	Company	Portugal
ACCIONA CONSTRUCCION SA	Company	Spain
ACIB GMBH	Academia & Public Labs	Austria
ACIB GmbH	SME	Germany
ACIES BIO BIOTEHNOLOSKE RAZISKAVE IN RAZVOJ DOO	Company	Slovenia
ACONDICIONAMIENTO TARRASENSE ASSOCIACION	Academia & Public Labs	Spain
Activatec Ltd	SME	United kingdom
Advanced Materials Cluster	Large Company: 13 SME: 37 Academia & Public Labs: 12	Spain
AEP POLYMERS SRL	Company	Italy
AERNOVA COMPOSITES SA	Company	Spain
AERNOVA ENGINEERING DIVISION SAU	Company	Spain
AFYREN NEOXY	Company	France
AGENCIA ESTATAL CONSEJO SUPERIOR DE INVESTIGACIONES CIENTIFICAS	Academia & Public Labs	Spain
Agencia Estatal Consejo Superior de Investigaciones Cientificas IBMCP	Academia & Public Labs	Spain
AGENZIA NAZIONALE PER LE NUOVE TECNOLOGIE, L'ENERGIA E LO SVILUPPO EC	Academia & Public Labs	Italy

The user list reveals a significant industrial presence, with SMEs being numerous in clusters (ECCP database). Also, it is noteworthy that approximately two thirds (3777 out of 5978) of SMEs are in Italy. This is because “Cluster COMET” alone is formed by 3650 SMEs.³

It is well established that small biotech companies are often the biggest spenders in terms of R&D. These are also the private entities most in need of access to research infrastructures and external research services. In this regard, SMEs represent a special target group that will be prioritized for future one-to-one interviews. These will be organized to capture SME expectations regarding IBISBA and understand their specific needs.

¹ The size of the company was not specified, and users were identified as private sector.

² The legal status was not specified or was classified as “other” in the raw data source.

³ It is noteworthy that the completeness of the user list reflects the data archived in the abovementioned databases, therefore it is not to be considered definitive. In fact, periodic updates of the user list are envisaged.

3-3 Visual representation of the user community

The list thus obtained was visually represented by a European map infographic, displaying user geographical distribution, user legal status and the number of users for each category in each country (example image in Figure 2, high quality interactive image in [Annex II](#) – Visual representation of IBISBA potential user community).

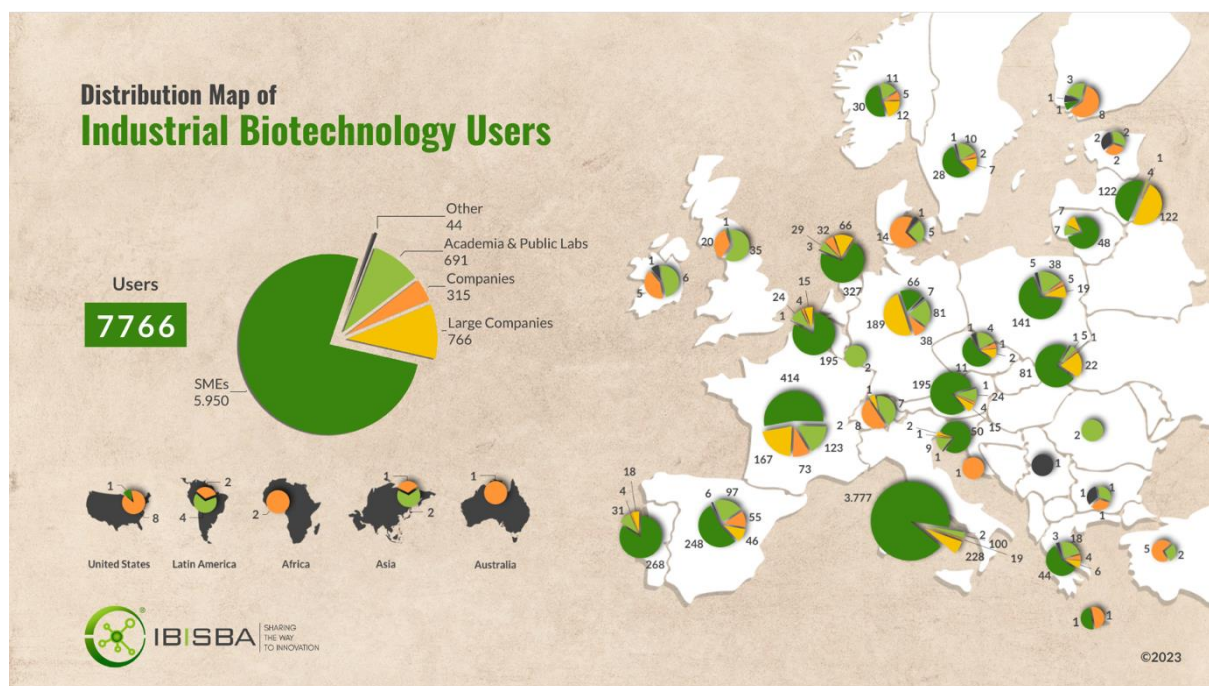


Figure 2. Visual representation of the IBISBA global potential user community

An interactive representation of the infographic has been created using the web-based application [Genially](#), a tool for creating interactive and animated images. Besides having a visual overview of the IBISBA global potential user community, the [interactive infographic](#) allows to visually explore individual data libraries, one for each user-type from which the global distribution/user-type map was built. Also, each map provides information related to the institutions, including name and public contact.

Although the data is publicly available, the interactive infographic is password-protected and thus is only available to registered visitors. This provides us with the means to develop dialogue with interested parties, inviting them for instance to add their contact details to IBISBA's stakeholder list. It is anticipated that some interested parties will be potential users in need of the kind of R&D services provided by IBISBA. These parties can contact info@ibisba.eu to receive the password.

A big advantage of using Genially is that the data is very easy to update with new entries, without having to change the URL. This way, once the link has been generated and shared, it becomes permanent.

3.4 Questionnaire-based survey to refine user research potential

The potential users list provided the basis for a multiple-choice questionnaire-based [survey](#) that was launched in February 2021 until April 2021. The survey was designed as part of Task 7.5-related activity to both refine the estimate of the user community and capture user information related to their user locations, professional activities and level of interest/use of industrial biotechnology (IB). Moreover, the survey allows us to learn about bottlenecks that are encountered and user expectations regarding IBISBA's R&D services.

The survey was prepared using Google Form in collaboration with the ESFRI research infrastructure EMPHASIS, and was made compliant with the [EU GDPR](#) that came into force on 25 May 2018. Finally, the survey was sent to a contact list selected in:

- IBISBA TNA applicant list
- ERA CoBioTech
- BioTic
- IBISBA Ambassadors' business contacts
- Partners' business contacts
- Follower database (social media and newsletter)

The survey's reach could not be assessed with precision since recipients were asked to distribute it internally within their organisations (e.g., from the department's head to their staff) for maximum dissemination and achieve the set goal of 300 answers. However, the reach was estimated at around 8-10 thousand receivers. On the other hand, it was possible to track the receivers who opened the survey, besides those submitting a response. This allowed calculating the conversion rate (n° respondents / n° receivers opening the survey) and measuring the impact of the survey.

The outcome exceeded the desired target of 300 answers and generated **352 responses** ([Annex III](#) – Output of the survey first round). However, the results were subject to a strong geographical bias (68% Italy vs 32% other countries). Therefore, a second round was launched from January to May, 2022 to better mobilize business contacts in countries where participation was abnormally low ([Annex IV](#) – Output of the survey second round).

The total number of responses, including both rounds, increased to 406 with an overall 12% conversion rate (406/3357). According to the [Digital School of Marketing](#) this is a satisfactory result since a good survey response rate ranges from 5 to 30%. The large interval strongly depends on the number of questions and how long it takes to answer them. As we launched a ten-minute survey, the response delivered an excellent engagement score. Responses by geographic areas are shown in Figure 3.

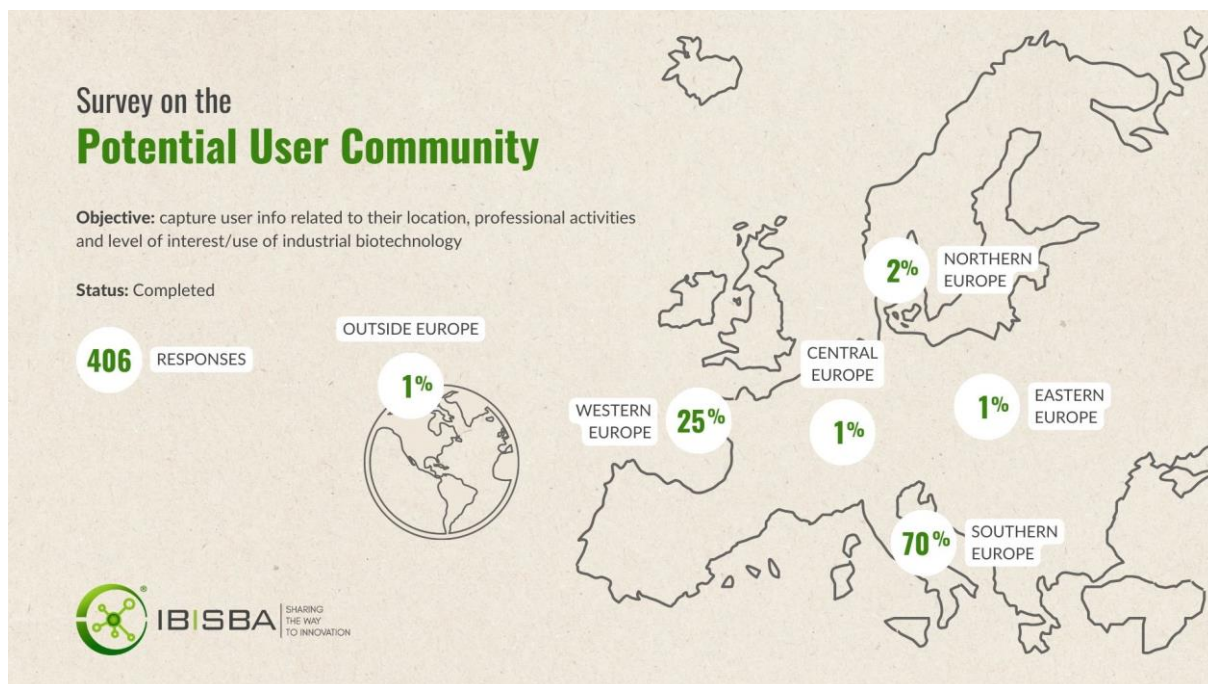


Figure 2. Survey responses by geographic areas expressed in percentage.

The analysis of the data collected from the survey will be reported in the second reporting period of the project as a task 7.5-related activity since it is outside the scope of this deliverable.

4 Conclusion

A thorough methodology has been deployed to map potential IBISBA's global user. This provides a good numeric estimate and the means to class potential users with respect to their likely relevance to IBISBA. A visual representation of the community has been created and made available online. The user list will be regularly updated as new users are identified. Finally, the survey provided an integrative tool to grasp users' expectations about IBISBA's services.

5 Partners involved in the work

CNR was involved in mapping the user community, making the visual representation, and distributing the survey.

UNINA was involved in mapping the user community, building and distributing the survey.

All Partners were involved in distributing the survey among their business contacts.

6 Annexes

- Annex I – [List of IBISBA potential users \(download\)](#)
- Annex II – [Visual representation of IBISBA potential user community \(interactive content\)](#)
- Annex III – [Output of the survey first round \(download\)](#)
- Annex IV – [Output of the survey second round \(download\)](#)