



Fuels-C

D7.3

Stakeholders' mapping & engagement strategies



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Executive summary

Based on the target groups identified in **D7.1 - Communication & Dissemination Strategy Plan**, the present document includes a deeper mapping of the stakeholders in the advanced biofuels ecosystem. The Stakeholders Mapping will serve as a basis for the tasks in WP6 on Replication scenarios and in WP7, for the market needs.

This analysis allows for a better understanding of the stakeholders' positioning towards the project, as well as their **needs, interests and potential roles in the adoption of the Fuels-C technologies**.

Thus, the mapping allows the consortium to better allocate the project's resources to maximise impact and visibility, by defining priority groups of stakeholders to engage. For that purpose, this document details the **strategies that will be used to engage with the stakeholders**, focusing specially on key stakeholders.

The following types of entities were identified as **Key Stakeholders**: policy makers and public institutions; regulatory and standardisation agencies; EU networks and platforms: Feedstock providers.



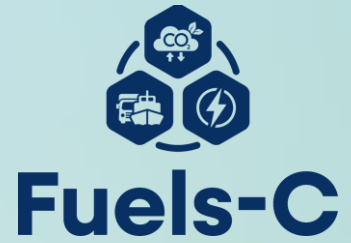
Table of contents

1. Scope & goals	<u>Page 6</u>
2. Methodology	<u>Page 8</u>
3. Stakeholder mapping	<u>Page 10</u>
3.1 Identification	<u>Page 11</u>
3.2 Categorisation	<u>Page 14</u>
3.2.1. Key stakeholders	<u>Page 17</u>
4. Engagement strategies	<u>Page 33</u>
4.1. Summary	<u>Page 34</u>
4.2 Definitions, timeline and responsibilities	<u>Page 35</u>
5. Monitoring	<u>Page 42</u>
6. References	<u>Page 45</u>



List of abbreviations

ACER	Agency for the Cooperation of Energy Regulators	EBB	European Biodiesel Board
AD-BES	Anaerobic Digestion / Bioelectrochemical System	ETIP Bioenergy	European Technology and Innovation Platform
BIP	Bioenergy International Partnership	EWABA	European Waste-based & Advanced Biofuels Association
C&D	Communication & Dissemination	IEA	International Energy Agency
CEER	Council of European Energy Regulators	M	Month
CEN-CENELEC	European Committee for Electrotechnical Standardization	NGO	Non-governmental organization
D	Deliverable	T	Task
DFID	Department for International Development	UECBV	European Livestock and Meat Trades Union
DG	Directorate-General	UPEI	Europe's Independent Fuel Suppliers
EBA	European Biogas Association	WG	Working Group
		WP	Work Package



1. Scope & goals



1. Scope & goals

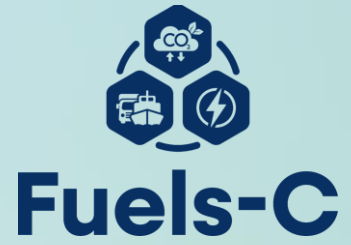
D7.3 Further analyses of the stakeholders identified in D7.1 – Communication & Dissemination Strategy Plan

The goals of this deliverable are:

- categorising the stakeholders and defining which are most important for the project's success;
- understanding the benefits they might receive or negative aspects they might face in relation to the project;
- defining any contributions needed from stakeholders;
- establishing engagement strategies in line with D7.1.

This analysis will also inform tasks from other Work Packages:

- T6.4 - Replication scenarios;
- T7.5 - Market intelligence and business strategy.



2. Methodology



2. Methodology

Identification

Who are the stakeholders and what are their interests

This task will build upon the stakeholder identification conducted in D7.1, further identifying the **interest** and potential **impact** (positive and negative) of each stakeholder.

Assessment

What is the level influence and importance of each stakeholder

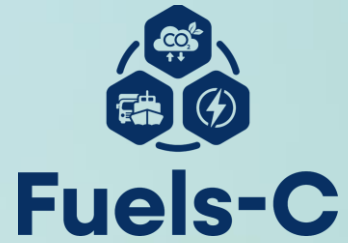
For this step, the influence / importance matrix will be used, in order to identify the **Key, Primary and Secondary stakeholders.**

Prioritisation

Resource optimisation

Taking the categorisation achieved in the previous steps, the distribution of efforts to **engage** stakeholders will be defined.

Based on Eskerod & Jepsen (2016) and DFID (2003).



3. Stakeholder mapping



3. Stakeholder mapping

3.1 Identification

A stakeholder is “any individual, community, group or organisation with an interest in the outcome of a programme, either as a result of **being affected by it positively or negatively, or by being able to influence the activity in a positive or negative way**” (DFID, 2003).

Table 1 (see next page) identifies, for each stakeholder:

- the benefits they may receive from Fuels-C;
- which contributions are needed from them;
- any potential barriers they may pose to the project.

Table 1. Stakeholder analysis in relation to Fuels-C.



Stakeholder	Description	Interest/Benefits for the stakeholder	Contributions from stakeholder	Potential negative impact from stakeholder
Regulatory and standardisation agencies	Agency for the Cooperation of Energy Regulators (ACER), Council of European Energy Regulators (CEER), European Committee for Standardization (CEN), European Committee for Electrotechnical Standardization (CENELEC)	Fuels-C's results can better inform regulatory design, allowing regulations to be in line with technological developments	Allowing open dialogue with Fuels-C consortium; taking into account Fuels-C activities and results in the regulatory design process	Regulatory barriers, not taking project results and needs into regulations design
Other EU-funded projects and initiatives	<u>Andalucia AB</u> , <u>OliPFUEL</u> , <u>REFOLUTION</u> , <u>NET-Fuels</u> , <u>SURPLAS</u> , <u>CARBIOUW</u> , <u>FLEXBY</u> , <u>NIAGARA</u> , <u>Bio-MeGAFuel</u>	Mutual benefits from knowledge exchange; work towards common objectives	Exchange of knowledge to avoid duplicated efforts; network facilitation	Competition for technology, feedstock, end users and/or investment
Policy makers and public institutions	European Commission, European Parliament, European Committee of Regions, as well as national and local policy makers and executive bodies	Fuels-C's results can inform legislative design, allowing legislation to be in line with technological developments; Fuels-C will contribute to public objectives for decarbonization	Allowing open dialogue with Fuels-C consortium; taking into account Fuels-C activities and results in the legislative design process	Legislative barriers, not taking project results and needs into legislation design
General public	Non-professionals, NGOs, citizen organisations interested in innovation, decarbonisation, climate change and alternative fuels	Fuels-C will contribute to decarbonisation, which benefits the general public	Engagement with project's communication activities	Negative or incorrect perception about the project, delay on the general acceptance of the solutions

Table 1. Stakeholder analysis in relation to Fuels-C.



Stakeholder	Description	Interest/Benefits for the stakeholder	Contributions from stakeholder	Potential negative impact from stakeholder
Industrial end-users and associations	Refinery industries, maritime, road industries and manufacturers using or producing advanced biofuels and the representative associations such as FuelsEurope, UPEI, Eurogas, EWABA, EBB	Uptake and scale-up of the technologies developed by Fuels-C may bring cost optimisation and environmental sustainability gains	Informing project of implementation barriers; uptaking technology	No visibility/interest means no business model jeopardising further research, scale-up of solutions and uptake
Feedstock producers	Agriculture and waste management entities	Sustainability gains, cost efficiency, new waste valorisation solutions	Parameters for use, production potential, availability and provision of feedstock	Feedstock unavailability hindering research, scale-up of solutions and uptake
Researchers/scientists/academia	Research organisations, scientists and researchers active in advanced biofuels conversion, universities and future generation of scientists	Mutual benefits from knowledge exchange	Exchange of knowledge to avoid duplicated efforts; network facilitation	Limited dissemination and exploitation, competition for investment of alternative research and innovation
EU networks and platforms	Alliances and working groups such as: European Biogas Association (EBA), Bioenergy International Partnership (BIP), ETIP Bioenergy, European Alternative Fuels Observatory, Bioenergy Europe	Mutual benefits from knowledge exchange; work towards common objectives	Exchange of knowledge to avoid duplicated efforts; help communicating project's activities, disseminating results, uptake and scale-up	Limited dissemination and exploitation, competition for investment and political relevance



3. Stakeholder mapping

3.2 Categorisation

There are three main types of stakeholders (DFID, 2003):

- **Key stakeholders:** those who can significantly influence or are important to the success of an activity;
- **Primary stakeholders:** individuals and groups who are ultimately affected by an activity, either as beneficiaries (positively impacted) or “*disbeneficiaries*” (adversely impacted);
- **Secondary stakeholders:** all other individuals or institutions with a stake, interest or intermediary role in the activity.

Note: This distinction is not rigid - there may be some overlap between types.



3.2 Categorisation

The Importance/power Matrix (Eskerod & Jepsen, 2016) was used to identify the Key, Primary and Secondary stakeholders

Importance: the priority given to satisfying the needs and interests of each stakeholder.



The less a stakeholder is impacted, the less important is to satisfy their needs.

Power: the ability of a stakeholder to facilitate or impede the achievement of the project's objectives.



3.2 Categorisation

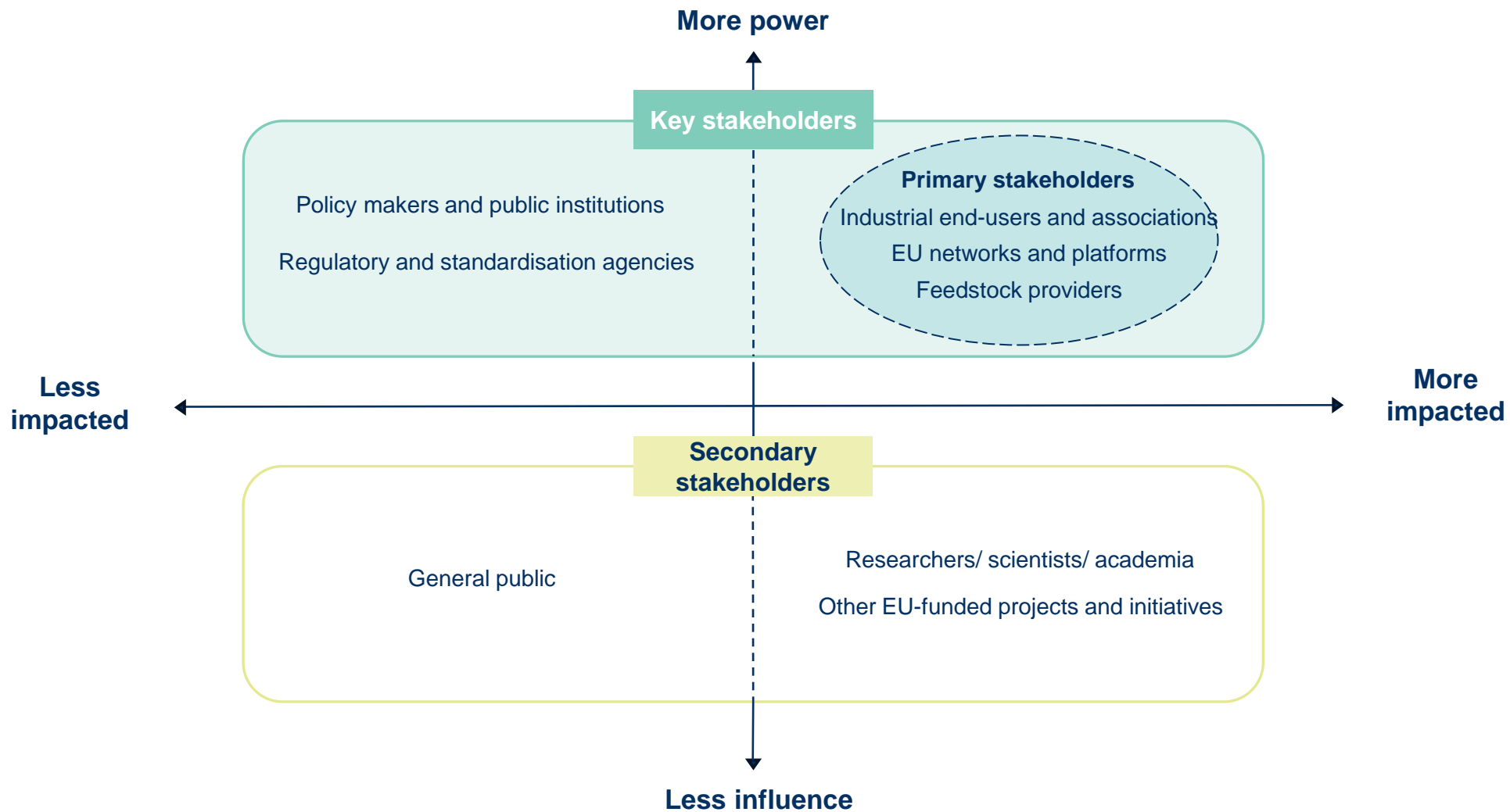


Figure 1. Importance / power matrix.




3.2.1. Key stakeholders

In order to tailor the engagement strategy, this deliverable presents a characterisation of the project's key stakeholders, by thematic and geographic area.

- Along with this deliverable, a dynamic online document for listing the key stakeholders was created (Figure 2; see next page), in order to guide the engagement efforts of the consortium: this document will contain the stakeholders' contacts and indicate which partner is responsible for contacting them.
- This will be an internal editable document, taking into account the privacy of the stakeholder's data.
- In the case of **public entities, associations or other types of clustering entities**, the following pages provide non-exhaustive examples.



3.2.1. Key stakeholders

 **Fuels-C**
Fuels-C Stakeholder mapping

NAME	DESCRIPTION <small>[Indicate the stakeholder's activity/contributions to the project]</small>	LOCATION	CONTACT	PARTNER RESPONSIBLE	WEBSITE	NOTES

Figure 2. Internal document for detailed tracking of stakeholders.



3.2.1. Key stakeholders

Policy makers and executive public institutions

EU level: European Commission

Directorate-Generals:

- Energy (ENER);
- Climate Action (CLIMA);
- Mobility (MOVE);
- Environment (ENV);
- Agriculture and Rural Development (AGRI);
- Research and Innovation (RTD);
- Internal Market, Industry Entrepreneurship and SMEs (GROW);
- Regional and Urban Policy (REGIO).

Executive Agencies:

- European Climate, Infrastructure, and Environment Executive Agency (CINEA);
- European Innovation Council and Small and Medium-sized Enterprises Executive Agency (EISMEA);
- European Research Council Executive Agency (ERCEA);
- European Research Executive Agency (REA).



3.2.1. Key stakeholders

Policy makers and executive public institutions

European Parliament

Committees:

- Industry, Research and Energy;
- Transport and Tourism;
- Environment, Public Health and Food Safety;
- Economic and Monetary Affairs;
- Agriculture and Rural Development.

European Committee of Regions

Commissions:

- Environment, Climate Change and Energy;
- Natural Resources;
- Economic Policy.



3.2.1. Key stakeholders

Policy makers and executive public institutions

National level

- Ministries;
- Local/municipal government;
- State companies;
- National Institutes;
- Specialised general directorates and working groups.

Thematic areas

Energy

Mobility

Climate

Environment

Waste management

Land use & Agriculture



3.2.1. Key stakeholders

Regulatory and standardisation agencies

Regulatory Bodies

- European Union Agency for the Cooperation of Energy Regulators (ACER);
- Council of European Energy Regulators (CEER);
- European Committee for Standardization - European Committee for Electrotechnical Standardization (CEN-CENELEC).

Agencies

- European & National Environment and Energy agencies.



3.2.1. Key stakeholders

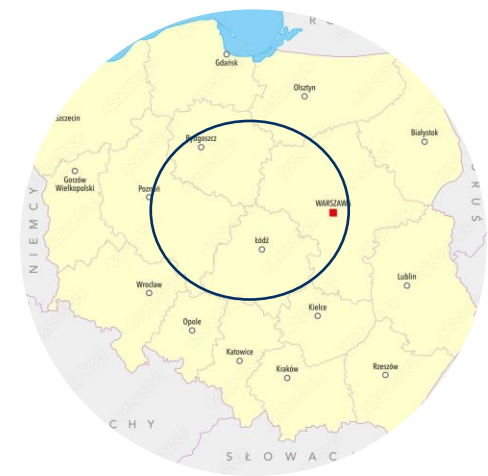
Feedstock providers

Fuels-C will develop and improve biofuels production technologies that use waste as feedstocks.

Task 2.1 resulted in the **identification of 4 feedstocks and regions:**



Livestock manure
Northwest Spain



Forest Biomass
Centre Poland



Municipal waste
Île de France



Pruning waste
Apulia, Italy



3.2.1. Key stakeholders

Feedstock providers

This section presents examples of potential stakeholders in each region, resulting from a preliminary mapping. **In WP6 (Task 6.4) FACSA and BER will continue the stakeholder identification.**

In addition to **feedstock producers**, the following tables include other types of stakeholders in each region, which can help Fuels-C establish its activities in the region and reach feedstock providers.



3.2.1. Key stakeholders

Northwest Spain | Livestock manure

INAGA (Aragon)	Aragonese Institute of Environmental Management.
AECERIBER (Badajoz)	Spanish Association of Iberian Pig Breeders.
ANPROGAPOR	National Hog Producers Association: non-profit organisation that represents and defends the interests of pig farmers in Spain.
IRTA (Barcelona)	Institute of Agrifood Research and Technology. Catalan agricultural research institute.
RECOSWINE /Universidad de Granada (Granada)	Studies and develops an integral valorisation method for swine manure combining, within the same protocol/system, a solid-state anaerobic fermentation and a subsequent composting process.
UECBV (Belgium, Brussels)	EU voice of national federations representing livestock markets, livestock traders, meat traders and the meat industry



3.2.1. Key stakeholders

Centre Poland | Forest Biomass

Forest Research Institute
(Pruszków)

The Forest Research Institute carries out comprehensive research for forests and the entire forestry as well as wooded areas and trees.

Warsaw University of Life Sciences (Warsaw)

The oldest agricultural and natural science university in Poland, which has a department for forestry science, dedicated, among other topics, to the study of forest materials management and valorization.

State Forests (Warsaw)

State Forests is a Polish governmental organization that manages state-owned Polish forests on behalf of the Polish State Treasury.



3.2.1. Key stakeholders

Île de France | Municipal waste

CIA - Agricoltori Italiani (Puglia)	The Italian Farmers' Confederation is a trade association that supports, protects and promotes the figure of the agricultural entrepreneur and his business.
Associazione dei Frantoiani di Puglia	Olive oil producer association.
CREA (Rome)	The Council for Agricultural Research and Economics an Italian national public research institution.
Regional Observatory on Organic Farming (Puglia)	Public entity, which, among other competencies, provides a complete mapping of biological production, transformation and marketing companies operating in the territory of Apulia.



3.2.1. Key stakeholders

Apulia, Italy | Pruning waste

Syctom (Paris)	Public authority for the sustainable management of household waste, with 6 sorting centres and 3 incineration and energy recovery units.
L'Institut Paris Region (Saint-Denis)	Major regional urban planning and environment agency, with competences related, among others, on energy and waste issues.
ADEME (Courbevoie)	Ecological Transition Agency dedicated to combat climate change, control resource consumption and make the ecological transition possible.
Observatoire régional des déchets - ORFID (Saint-Denis)	Regional Waste Observatory - includes State entities with competences in waste management, as well as private operators, consular chambers, eco-organizations, consumer and environmental protection associations.



3.2.1. Key stakeholders

EU networks and platforms

National and International alliances and working groups, such as:

- European Biogas Association;
- Biomethane Industry Partnership;
- European Alternative Fuels Observatory,

ETIP Bioenergy working groups:

- WG1 Biomass Availability;
- WG2 Conversion (processes);
- WG3 Biofuels distribution and end use;
- WG4 Policy and Sustainability.

IEA Bioenergy working groups/ tasks:

- T33 Gasification of Biomass and Waste Biomass Availability;
- T37 Energy from Biogas;
- T39 Biofuels to Decarbonize Transport;
- T42 Biorefining in a Circular.



3.2.1. Key stakeholders

Industrial end-users and associations

As the organisations that will uptake the technologies improved by Fuels-C, end users are key stakeholders, **looking into the future uptake of the project's technologies.**

End users:

- Transportation companies – maritime, road (Passenger, Cargo);
- Refineries, Biofuels producers;
- Renewable energy companies and distributors.

The following slides provide a brief characterisation of the biofuels market. This serves as a basis for the full stakeholder mapping of the biofuels end-users (internal document, see Figure 2).



Characterisation of biofuel EU market: **production**

Types of fuel: In 2020, the overall EU production of biofuels was 20 billion litres per year, of which 15 billion litres were biodiesel and 5 billion litres were bioethanol.

Geography: Germany is the largest producer of biodiesel in Europe, followed by France and Spain
Other significant biodiesel producers in Europe include Italy, Poland, and the Netherlands.

Type of producers: Refineries dominate the market in terms of investment in production capacity. This makes them an important stakeholder, as potential end-users of Fuels-C technologies.

Sources: *EEB (2023), IEA Bioenergy T39 (2023).*



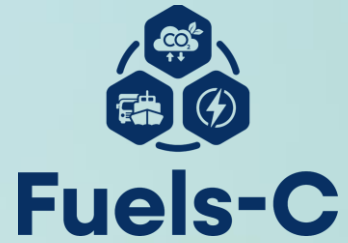
Characterisation of biofuel EU market: **consumption**

Types of fuel: biodiesel accounted for the highest share of biofuels used for transportation, at 68.7%. Biogasoline accounted for nearly 17% and biogas accounted for nearly 3%.

Geography: The largest consumers of biofuel in the European Union are France, Germany, and Italy.

Type of consumers: The transportation segment was at the forefront of the biofuels industry, with a maximum revenue share of more than 71%. Within this, the road transport sector was the biggest consumer, although marine applications are being improved. Biofuels have a small share in heating generation (biogas – 4%; liquid biofuels – 0%). Regarding power generation, biogas and liquid biofuels accounted for 15% of production.

Sources: *Statista (2024a), Statista (2024b).*



4. Engagement strategies

4. Engagement strategies



4.1. Summary

Table 2. Strategies summary.

Stakeholders	Engagement Strategy	Objective	Engagement activities	Main point of contact
Policy makers and public institutions / Regulatory and standardisation agencies	Involve	Rely on this stakeholder's advice when making decisions about the planning process	Participation of the stakeholder in project's events as contributor; Fuels-C Advisory Board publications; white papers, position papers, reports & recommendations; conferences organised by the EU; dedicated events; attendance of relevant technical committees' meetings	LEITAT
EU networks and platforms / Industrial end-users and associations / Feedstock producers	Collaborate	Work together with this stakeholder to come up with solutions	Bilateral meetings; mutual participation in events as contributors; joint communication efforts; exchange of network contacts; International fairs, participation in industrial interest groups through partners networks; white papers	LEITAT, UdG, VITO, CEA, ISLE
General public	Keep informed	Provide this stakeholder with information about the planning process, to assist them in understanding the process	Communication via social media, website and public events; public deliverables; general media	MAGCIR
Researchers, scientists & academia / Other EU-funded projects and initiatives	Consult	Obtain this stakeholder's feedback on key planning process that are relevant to them	Scientific papers; communication in specialized media; international conferences; public deliverables; European conferences and workshops, co-organised events; mutual collaboration and clustering; publications; cross promotion	UdG, LEITAT, VITO, CNR, UBU, CEA, MAGCIR



4.2 Definitions, timeline and responsibilities

The following section provides a description of the engagement strategies, the respective key implementation steps and the procedure/responsible partner.

Some groups of stakeholders have several partners identified as **main points of contact**, however, there will be only one partner responsible for contacting each entity within those groups. This decision will be made according to existing relationships and geographical area. All activities will be supported by Magellan Circle.

Some activities presented in the previous table are described in **D7.1** and, therefore, are not detailed in this deliverable:

- Fuels-C events;
- Social media;
- Website;
- Press relations;
- Scientific papers and specialised media;
- International fairs, conferences & workshops.



4.2 Definitions, timeline and responsibilities

Bilateral meetings

- Fuels-C events (Symposia, Webinars, Innovation Workshops, Final Event) will be used to host bilateral meetings with different stakeholders, in order to establish lines of communication and a close partnership.
- This will be the base for the implementation of several other engagement strategies.

Participation in industrial interest groups through partners networks

- Every partner will be responsible for identifying and participating in industrial interest groups within their network.
- This will be a continuous process and the participation will be overseen by LEITAT.



4.2 Definitions, timeline and responsibilities

Attendance of relevant technical committees' meetings


- A scouting of technical committees from public institutions will be done every 6 months.
- This will be conducted by all partners in their respective countries, while Magellan Circle and LEITAT will be responsible for doing this research at an international level.
- This information will be registered in the internal document for external events participation tracking (Figure 3).

Participation of the Fuels-C consortium in other events and co-organisation

- Magellan Circle is responsible for updating the internal list of relevant external events (see next page).
- Each partner should add events to this list and, with the support of LEITAT, decide on participation.
- Leveraging the synergies created with the stakeholders, specially with other projects, events will be organised jointly.



4.2 Definitions, timeline and responsibilities

 **Fuels-C**
Event tracking

EVENT <small>[please write event name]</small>	<input type="checkbox"/> TYPE OF EVENT <small>[select: conference; professional conference; etc]</small>	<input type="checkbox"/> DATE <small>[DDMMYY]</small>	<input type="checkbox"/> LOCATION <small>[Country] [City] [Venue]</small>	<input type="checkbox"/> ENTITY	<input type="checkbox"/> PERSON(s) ATTENDING <small>[Name / Role in the project]</small>	<input type="checkbox"/> FORMAT <small>[online] [in-person] [hybrid]</small>	<input type="checkbox"/> LINK <small>[event link, website, landing page, etc]</small>

Figure 3. Internal document for relevant external events tracking.



4.2 Definitions, timeline and responsibilities

White papers, position papers, reports & recommendations

- These documents will inform all key stakeholders about Fuels-C results and contextualise them in relation to policy and regulatory frameworks, providing recommendations of action to policy makers and regulators.
- The papers, reports and recommendations will have a sector holistic perspective and consider real obstacles and expectations of the sector, which results from synergies created during the project implementation with stakeholders affected by policies and regulations.
- These stakeholders will also be consulted directly in the development stage of the documents.
- The advisory board will play a crucial role in this strategy, by contributing to and validating the documents.

Key actions:

- ❑ Last 6 months of the project: most of the deliverables are already developed and will serve as a base for the engagement strategy.
- ❑ M42: Deliverable 6.4. Replication Scenarios is due.



4.2 Definitions, timeline and responsibilities

Efforts towards joint communication and cross promotion

- Support for Fuels-C C&D activities by reference institutions in the advanced biofuels sector, namely **Industry Associations and EU networks and platforms**.
- These stakeholders generally offer information repositories, which include sector news, reports and events, which can be used to communicate Fuels-C activities and results, benefiting both parties.
- The main points of contact for each stakeholder (see table 2) conduct meetings and send C&D requests of content and events in key stages of the project to the stakeholders.

Key actions:

- ❑ M12 & M13 - hold a virtual or presential meeting before or during the 1st Symposium to present the project and establish lines of cooperation.
- ❑ Leverage other Fuels-C events to hold bilateral meetings; request event dissemination: 2nd Symposium, Webinars, Innovation Workshops, Final Event.
- ❑ Request to disseminate scientific papers, white/position papers and policy recommendations.



4.2 Definitions, timeline and responsibilities

Fuels-C established an **Advisory Board** composed of academic and non-academic domain experts, which will advise the consortium on the project's strategy, technical decisions, stakeholders' engagement and public regulation uptake. The AB is composed by:

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(Confidential)

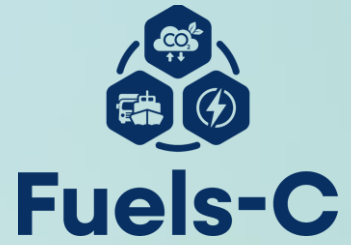
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Key actions:

- ❑ First in person meeting foreseen for M12 General Assembly.



5. Monitoring



5. Monitoring

Stakeholder analysis “*must be done iteratively*” (Eskerod & Jepsen, 2016), meaning it should be carried out and revised along the project, because stakeholder’s position towards the project is not rigid.

In this sense, the present engagement strategies will be monitored continuously through the following activities:

- **Key Stakeholders:** apply a questionnaire or conduct interviews during the bilateral meetings;
- **Other stakeholders:** Publish the questionnaires in the project’s website and social media or send via email in months 28 and 40 (indicative timeline);
- Include monitoring conclusions, such as engagement barriers, established partnerships and joint activities in the project reports (M18, M30 and M42) and in the D7.2 revision (C&D Plan);
- Track stakeholder contact through the detailed stakeholder list (internal document);
- Adapt engagement strategies according to the results.



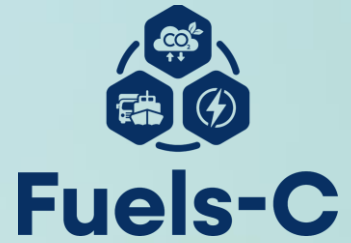
5. Monitoring

The questionnaires/interviews will obtain information about whether the stakeholder is engaged with the project and if their expectations are being met.

The following points of discussion will be used:

- Perceived positive and negative impacts of the project from the stakeholders;
- Stakeholder motivation to contribute to the project;
- Stakeholder expectations regarding project's activities and results;
- Common activities/work and points of interest:
 - Continuous establishment of synergies during the project;
- Stakeholder concerns in the short and long term;
- Suggestions for project implementation;
- Future potential synergies and partnership opportunities.

Magellan Circle will be responsible for coordinating the monitoring efforts, including producing the script for the interviews and questionnaires.



6. References



6. References

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