

Plants for the Future

Stakeholders Proposal for a Strategic Research Agenda 2025 Including Draft Action Plan 2010

Part I

Summary

Working Draft - Final edited draft will be available in the coming days

Table of contents

**Page
number**

Part I - Summary	
Table of contents	2
Introduction	3
Overview of the four challenges	5
Towards implementation of the challenges	17
Methodology	18
Glossary	20
Working groups	20
Part II – Strategic Research Agenda	
Challenge 1: Healthy, safe and sufficient food and feed	
1.1 Introduction	
1.2 Goals	
1.2.1 Goal 1 : Develop and produce safe and high quality food	
1.2.1 Goal 2 : Create food products targeted at specific consumer groups and needs	
1.2.2 Goal 3 : Produce safe, high quality, sufficient and sustainable feed	
Challenge 2: Sustainable agriculture, forestry and landscape	
2.1 Introduction	
2.2 Goals	
2.2.1 Goal 1: Improve plant productivity and quality	
2.2.2 Goal 2: Reduce and optimise the environmental impact of agriculture	
2.2.2 Goal 2: Enhance biodiversity	
2.2.4 Goal 4: Enhance the aesthetical value and sustainability of the landscape	
Challenge 3: Green products	
3.1 Introduction	
3.2 Goals	
3.2.1 Goal 1: Plants as a basis for renewable resources	
3.2.2 Goal 2: Plant-based pharmaceutical and diagnostic products	
3.3 Annexe	
Challenge 4: Competitiveness, consumer choice and governance	
4.1 Introduction	
4.2 Goals	
4.2.1 Goal 1: Vibrant Basic Research	
4.2.2 Goal 2: Human resources, Infrastructure, and networking	
4.2.3 Goal 3: Public / consumer involvement	
4.2.4 Goal 4: Ethics, safety, legal and financial environment	
4.3 Annexe	
5. People (complete list)	
Part III – Draft Action Plan 2010	
To Challenge 1: Healthy, safe and sufficient food and feed	
To Challenge 2: Sustainable agriculture, forestry and landscape	
To Challenge 3: Green products	
To Challenge 4: Ethics, safety, legal and financial environment	

Document layout

The Agenda is divided into three parts:

- Part one provides a brief and general overview of the Plants for the Future Technology Platform and its Strategic Research Agenda for a general readership, including policy-makers, non-specialist scientists, and interested members of the general public and other stakeholders. It contains a concise summary of the four challenges and how the Platform proposes to address them.
- Part two contains a detailed exposition of each of the four challenges. For each challenge, it covers an in-depth introduction to the issues pertaining to it, the goals the Platform plans to achieve, and deliverables and research activities for the next two decades. Owing to its length and technical nature, it is likely to be of primary interest to specialists in the particular field covered. However, all stakeholders are invited to read Part two or the sections of it that draw their attention.
- Part three compiles the proposed activities for the period 2006-2010 as the Draft Action Plan 2006-2010.

1. Introduction

Towards a knowledge-based bio-economy

The EU is working hard to fulfil its ambition of being the world's most competitive knowledge-based economy. This conjures up images of silicon valleys and technology parks, of high-tech equipment and cutting-edge pharmaceuticals. But where do plants fit into the equation? Surely plants are to do with the countryside or the garden or the forest, not part of the avant-garde of technological progress.

Well, of course it is true that the cultivation of plants – agriculture – is one of the most ancient of human technologies. And the use of plants as medicines, foods, clothing and shelter pre-dates agriculture. Humans have depended on plants since the inception of human civilisation and, indeed, virtually all modern human societies have based much of their progress on plants.

Thanks to agriculture, nomadic humans settled and laid down roots. Traditionally, plants have generated virtually all the important resources for humankind, not only food and feed, but also oils, fibres, energy, and wood for building houses and ships. The simple but essential thing that plants can do – and no other organisms can – is to take simple chemical building blocks from the air and the soil and make complex organic products using the sun as a source of free energy.

Humans have been intimately dependent on plants for millions of years. But we do not know very much about them. Agriculture is 15 000 years old but structured plant breeding is a 20th century art. Intensive agriculture and organic farming alike require improved plant varieties, but they depend heavily on their ability to alter the environments in which plants grow (by weeding, fertilising, the timing of planting, etc.). It is only at the beginning of the 21st Century that humans are starting to have any understanding of how and why plants respond to changing soil or climatic conditions, or the presence of pests and diseases. We are starting to understand the basis of drought and stress resistance. We know a little about plant development and growth. We have a good sense of how plant leaves move around to maximise the amount of solar energy they collect.

Plants have helped humanity blossom, and they will be every bit as essential in the future. A growing world population has to be fed, and increasing demand for high-quality, safe and affordable foods have to be met. Fossil resources – limited in availability and a major source of greenhouse gas emissions will need to be replaced with renewable resources. Sustainable economies will have to be based largely on renewable biological resources.

We already have a bio-economy¹. Plants are the basis of European industries with an annual turnover of more than €1 trillion. Plants will have to play an even more important part in our economies in the future. There is no alternative, and not much time. But in order to rise to the challenges of growing populations, dwindling resources, and the environment, the new bio-economy will have to be knowledge-based.

Maintaining and strengthening our scientific and technological basis is of critical importance. Europe needs to become an incubator for top researchers and innovative companies, who are often tempted to develop their activities elsewhere. This is not the task of one organisation or of one country. It is only through the commitment of all stakeholders, working together in a coherent fashion at the European level, that we will be able to address these challenges.

Branching out into the future

It is with this in mind that the **Plants for the Future** Technology Platform was launched in 2004.

The Platform is open to the stakeholders supporting this vision paper, Member States and other interested partners. It was charged with drawing up a Strategic Research Agenda (SRA) that would signpost the way forward for the next 20 years and with developing a more detailed action plan for the 2006-2010 period. Some 290 people from 30 countries representing different stakeholder groups – academia, industry, the agricultural and forestry sectors, as well as experts in educational, communications, legal and financial issues, governmental, consumer and environmental organisations – have been involved in the process of producing the stakeholder proposal for an SRA, including the Draft Action Plan 2006-2010. They contributed via direct participation in workshops, drafting groups or on-line consultations.

¹ The term 'bio-economy' includes all industries and economic sectors that produce, manage and otherwise exploit biological resources (and related services, supply or consumer industries), such as agriculture, food, fisheries, forestry, etc.

The courses of action outlined in this report are, of course, not set in stone. In fact, this stakeholder proposal for a strategic research agenda is moving on to its consultation phase – involving Member States and other stakeholders – which will last until the end of 2005. The final version of the Strategic Research Agenda 2006-2025 and the Draft Action Plan 2006-2010 will be available in mid-2006.

Wider web of collaboration

Plants for the Future will collaborate directly with other Technology Platforms: these may include *Food for Life*, *Sustainable Chemistry*, *Forestry*, *Innovative Medicines*, *Farm Animal Breeding* and *Global Animal Health*.

The Strategic Research Agenda and Action Plan will endeavour to address four main challenges:

- Challenge one: Healthy, safe and sufficient food and feed
- Challenge two: Sustainable agriculture, forestry and landscape
- Challenge three: Green products
- Challenge four: Competitiveness, consumer choice and governance

The following chapter gives a concise summary of each of the four challenges, including deliverables and proposed research activities to address these challenges.

2. Overview of the four Challenges

Challenge one: Healthy, safe and sufficient food and feed

Plants are the primary source of energy, nutritional ingredients and tissue-building substances for most other organisms. They convert atmospheric carbon dioxide into carbohydrates via a solar energy-dependent process. Hence, plants are at the root of the food chain on which we depend. We consume vegetables, fruit, rice, grain and other plant matter directly or following cooking. Even meat ultimately comes from plants since we feed plants to animals.

Food demand is likely to rise significantly in the coming decades, both within Europe and globally. This will be fuelled by population growth, which is expected to reach 9 billion, from the current 6 billion, by 2050. In industrialised countries, more prosperity and a greying population will push up demand for high-quality and safe food. While many of the poorest countries will continue to struggle simply to put food on the tables of their burgeoning populations, improving living standards elsewhere in the developing world will enrich the diet of the average citizen, straining agricultural resources still further. Diet enrichment means increased meat consumption, which is expected to increase by 7% annually over the next decade². This would result in a doubling of today's feed production by 2015. We will either need to double the arable land needed for animal feed or significantly increase crop productivity.

Diets and lifestyle are cornerstones of human health. The combination of high-fat, energy-dense diets and sedentary behaviour increases the incidence of such chronic conditions as obesity, diabetes mellitus, cardiovascular disease, stroke, hypertension and some cancers. These 'rich world' diseases spread to developing countries as they industrialise. We have to encourage people to eat healthier diets, as well as to exercise more and lead healthier lives. We should also exploit the potential of food for preventing the onset of chronic diseases. Nutrition research can help identify the relationship between food and health and plant sciences can help develop specially tailored food products.

Accordingly, the specific goals that will be explored under this challenge are:

1. Develop and produce safe and high-quality food.
2. Create food products targeted at specific consumer groups and needs.
3. Produce safe, high quality, sufficient and sustainable feed.

Goal one: Develop and produce safe and high-quality food

Although quality concerns consumers, the improvement of the quality of harvested plant products was not really an issue in the past. However, quality is essential and determined by different characteristics.

- Plant raw material for food and feed need to contain certain main components (carbohydrates, proteins and oils) in desirable amounts, as well as all the factors influencing its nutritional value. Nutrients, such as vitamins, specific classes of unsaturated fatty acids, antioxidants (for example, vitamin E) or mineral nutrients (such as iron or magnesium) are well recognised for having an impact on human health.
- Other factors influencing the quality of plant raw materials and, in turn, the quality of food are those determining the sensory and/or processing characteristics (for food manufacture). Flavour, texture and aroma are normally seen as essential characteristics and often said to be the most decisive factor in buying and enjoying food. Factors determining the shelf life of both fresh produce and processed food, or the stability of plant raw materials after harvest, are also important.

Deliverables and research activities include:

- **Five years:** Analysis of the regulatory pathways controlling the accumulation of storage compounds and specific metabolites in different crops. Identification of the steps to be modified for the improvement of composition. Identification of the molecular components of plants – in close co-operation with industry – that determine sensory characteristics and the shelf life of food, as well as post-harvest characteristics of plant raw materials. This should be followed by an analysis of the biochemical pathways leading to them as a basis for improvement.

² 'Farm Animal Breeding' draft vision paper

- **Ten years:** Improvement of the quality of plants with regard to the key factors identified above. The scientific tools and technologies used for this purpose – be it molecular breeding, tilling and/or genetic engineering – will be selected and applied on a case-by-case basis depending on the crop species
- **Twenty years:** Produce crop varieties which satisfy the quality requirements of both consumers and the food industry

Goal two: Create food products targeted at specific consumer groups and needs

Food does more than meet our basic nutritional needs or appeal to our taste buds. It is also important for supporting our general health and well-being. A good example of this is plant-derived phytosterol which is an ingredient of margarine. It has been shown that regular consumption of this kind of margarine reduces blood cholesterol levels which lower the risk of coronary heart disease. For this reason, the Strategic Research Agenda also focuses on developing plant raw materials for healthier/functional foods.

Research activities include:

- Plant raw materials for low-glycemic food, i.e. food containing carbohydrates which are metabolised slowly. This would be beneficial for diabetics.
- Plant raw materials for foods enriched with carotenoids – which are found in yellow and orange fruits and vegetables and in dark green, leafy vegetables – and/or polyunsaturated fatty acids. Age-related macular degeneration in the retina of the eye is the leading cause of severe visual impairment and blindness in the elderly. Carotenoids, such as zeaxanthin and lutein, may help prevent this. They can also help lower the risk of heart disease.
- Plant raw materials for food with cancer prevention characteristics. There is increasing evidence that certain plant components play a role in reducing the incidence of cancer which is on the rise as our population greys.

All these deliverables are based on small molecules or structural components out of plants.

Deliverables include:

- **Five years:** Identification and characterisation of the molecular structure of plant polymers, such as carbohydrates, as well as the characterisation of plant metabolites that reduce the incidence of cancer. This needs to employ an interdisciplinary approach bringing together plant scientists, doctors and nutritionists.
- **Ten years:** Biosynthetic principles leading to the accumulation of carotenoids and polyunsaturated fatty acids have to be identified and/or characterised.
- **Fifteen years:** This kind of research will lay the foundation for improving these characteristics of crop plants using both molecular breeding and transgenic approaches.
- **Twenty years:** If all the above is achieved, it would then become possible to bring to market wheat, rapeseed or potato plants which satisfy the needs of specific consumer groups.

Goal three: Produce safe, high quality, sufficient and sustainable feed

Over the past two decades, global meat production has increased rapidly. In the EU and other developed countries, the trend in animal husbandry is moving towards healthier, more convenient and varied meat and dairy products. To meet demand, the livestock sector is rapidly industrialising. At the same time, growing environmental concerns in the developed world are pushing agriculture towards more sustainable technologies.

Industrial feed consumption for livestock production in the EU-15 was largely stable in recent years and is expected to remain constant. The Union imports some 40 million tons of grain each year – 70% of these protein-rich compounds are used as feed. This situation is unlikely to change without significant plant and crop improvements, particularly for wheat and rapeseed. In addition to boosting production, safety is likely to remain a crucial issue when it comes to feed. In this context, the reduction of mycotoxins – caused by fungus – in cereals will play a prominent role. According to estimates of the Food and Agriculture Organisation (FAO), the world loses \$1 billion (approximately €840 million) worth of foodstuffs due to mycotoxins per year. It is also important to have access to plant raw materials which contain few compounds that negatively influence the growth and health of animals or, in turn, humans.

Another major deliverable under this goal could be quality feed for quality food. The better we understand the feed requirements of cattle, swine and poultry on a molecular level, and the better we adapt feed to them, the higher meat quality will become.

Deliverables and research activities include:

- **Five to ten years:** Develop biochemical tools and biological assays (high-throughput techniques) for precise quantification of mycotoxins in crop plants. Furthermore, the molecular mechanisms underlying the plant-pathogen interaction need to be deciphered. It is also necessary to assess the macro- and micronutrient characteristics we need in the plant raw material regarding feed uses, to characterise the cellular processes leading to the accumulation of these nutrients within the plant, as well as to elucidate the mechanisms plants use to accumulate such substances as heavy metals and xenobiotics. All this has to be done in close co-operation with agronomists and nutritionists to allow market-relevant assessment.
- **Ten to fifteen years:** Based on the above, identify suitable germplasms in classical or novel crops meeting our demands. Furthermore, we need to isolate genes and quantitative trait loci (QTLs) relevant to introducing the desired feed quality traits into plants, and to use these genes and QTLs to develop appropriate crop plants using molecular breeding and/or genetic engineering.
- **Ten to twenty years:** Delivery of crop plants to the European market.

Challenge two: Sustainable agriculture, forestry and landscape

The invention of agriculture sparked massive growth in the human population. Millennia have passed since uncultivated wildlife alone could satisfy the human race's food needs. The human population will continue to increase, perhaps reaching 9 billion by 2050. Some parts of the world still suffer from periodic famines. Today, around 800 million people (13% of the world's population) are malnourished. However, the unprecedented food abundance in many parts of the industrialised world makes many people, including Europeans, oblivious to the want elsewhere.

Over the next 20 years (2005 to 2025), the challenge is not only to satisfy growing demand but also to do it in a sustainable manner. Political and social will must lead the way. Europe's common agricultural policy – adopted to address agricultural self-sufficiency in the continent – show just what can be done when the political will is there: Europe's agricultural productivity has jumped two-fold within the last fifty years.

This Technology Platform will result in new knowledge of plants that can help to address future needs. This knowledge will demonstrate what is possible in new energy-efficient farming practices and how the use of fertilisers and of phyto-chemical products can be modified. It will also help broaden the range of European crops, satisfy emerging needs for energy and renewable raw materials, and reduce energy-consuming transportation of food.

This sustainability challenge should focus on four goals:

1. Improve plant productivity and quality
2. Reduce and optimise the environmental impact of agriculture
3. Boost biodiversity
4. Enhance the aesthetical value and sustainability of the landscape

Goal one: Improve plant productivity and quality

As a first priority, we need to strike a sound balance between boosting productivity and providing consumers with the products and quality they require. We believe part of the answer lies in plant genomics – understanding how all the inherited characteristics of a plant combine to imbue it with its intrinsic characteristics. The factors that influence yield, for instance, should be important in supplying a growing world population with affordable and safe food of adequate quality and quantity. Understanding how plants can produce the renewable fuels and raw materials that industry and consumers need would help lower dependence on fossil fuels and native forests. Plant genomics can also help manage natural resources and biodiversity optimally. And last, but not least, plant genomics can provide economic, social and territorial benefits for European citizens.

New plant genomics tools should allow us to identify and to improve the adaptability of existing crops to different uses. Already, for instance, there are wheat varieties that are adapted to the needs of the bread, biscuits or starch industries. Crops are increasingly being designed (by breeding) and grown (farming) to meet the food and feed industries' specific requirements. In addition to the nutritional value of food, crop products need 'functionality'.

Deliverables and research activities include:

- **Five years:** For each crop, including cereals, legumes, oil and fruit-producing species, as well as for tree species, the bottlenecks limiting productivity and affecting the stability of yields need to be identified using physiological and molecular approaches. Factors contributing to the quality of harvested products, including deleterious ones, should be identified.
- **Ten to twenty-five years:** On this basis, molecular breeding tools can be used to obtain elite cultivars cumulating in a high photosynthetic capacity, an optimised growth cycle and architecture, an improved tolerance to abiotic factors with emphasis on water-use efficiency and adaptation to low temperatures. Cultivars displaying stable yields under varying environmental conditions should also be obtained. Finally, new varieties with high quality and good taste can be obtained for major crops used as food sources.

Goal two: Reduce and optimise the environmental impact of agriculture

A second sustainability priority – perhaps the most important – is to reduce the environmental impact of agriculture. Developing milder crop protection methods will probably require both improvements in the management of phyto-chemical products and the development of self-protected plant varieties. Research can identify genes involved, for instance, in pest tolerance/resistance and this would allow plant breeders to select for such traits.

Water is likely to become scarcer. While better irrigation management is essential, plant genomics can also help design ‘water-efficient plants’ by identifying sets of drought tolerant genes which are suitable for various climatic situations.

Optimising fertilisation is a related challenge. Plant genomics can improve the efficiency of nitrogen use in crops by characterising the relevant metabolic pathways and identifying the relevant genes.

Europe is the cradle of plant breeding and plant biotechnology, and has the potential to meet these challenges and create more sustainable cropping systems by combining genomic approaches with analytical techniques, molecular breeding and biodiversity studies

Deliverables and research activities include:

- **Five years:** A first priority is to develop accurate and inexpensive monitoring tools to identify, with a high degree of accuracy, when and where a specific agrochemical has to be delivered in the field. The goal will be to deliver the right molecule to the right crop at the right time using high-precision delivery tools. Monitoring tools should also be created to follow the cycle of the delivered molecule in the crop, the soil and atmosphere and to improve agricultural practices. Anticipating the new spread of diseases and pests can also be improved through the development of monitoring tools allowing the farmer to perform an inexpensive and accurate diagnostic in due time. For many crops, high yields require high amounts of fertilizers and water. New farming practices preventing the leakage of nutrients/fertilisers by employing appropriate crop cycle management should be formulated.
- **Five to ten years:** Crop protection from pathogens and diseases is preferably achieved via the effective exploitation of genetic resistances. Major diseases and pests should be chosen for an in-depth identification of their virulence and spread using the molecular approaches of sequencing and functional genomics. Defence mechanisms operating in crops can be further characterised using molecular approaches. Beneficial biotic factors contributing to crop protection by preventing the proliferation of pests and diseases, as well as signal molecules involved in the recognition mechanisms, should be identified. The production of feed is one of the priorities of EU agricultural policy. This can be achieved by increasing grassland production, based on the development of new varieties of N-fixing crops which require less input for their management when appropriately mixed with other grasses.
- **Ten to twenty-five years:** On this basis, rational approaches to effective disease and pest management can be developed, reducing the need for photochemical protection and leading to improved farming practices. The creation of varieties cumulating various sources of genetic resistances via molecular breeding is likely to be a major goal of the programme. Based on the identification of bottlenecks in their metabolisation, varieties with improved water and nutrient utilisation efficiency should be obtained.

Goal three: Boost biodiversity

The third sustainability priority should be to enhance and utilise plant biodiversity. Firstly, we need to characterise and maintain the biodiversity that exists in the field. We already have the tools to evaluate how different farming practices affect biodiversity (ecological surveying, modelling, etc.). These can generate knowledge which would allow better biodiversity and landscape management in rural and suburban areas.

Part of our existing biodiversity lies in the collections of plant varieties and related species in gene banks. These have served as the sources for many crop improvements. However, hundreds or thousands of stored seeds with potentially useful properties have never been explored. We now have the tools to look for the genetic biodiversity hidden in those collections.

Furthermore, the domestication of new plant varieties would greatly increase biodiversity within agriculture. The majority of crops grown in Europe originate from domestication processes that occurred thousands of years ago in specific areas, such as the Fertile Crescent (for wheat and barley). Crop improvement introduces diversity by bringing in the genes for specific traits from wild relatives of crop species. But with a greater understanding of a wider range of plants, breeders may also be able to bring wholly new crops to farmers. We may be entering a new phase in which the management of biodiversity in agriculture can lead to the creation of crops adapted to our needs.

Deliverables and research activities include:

- **Five years:** Farming practices need to be improved to reduce their negative impact on biodiversity. Monitoring and modelling tools should first be developed to compare accurately the impact of different practices on biodiversity in the field as well as in the forest. Core collections maximising the exploitable (and accessible) biodiversity available for major crops should be created and properly managed, based on the analysis of allelic diversity. Finally the identification of potentially interesting wild species, producing specific foods or feed of interest should be performed based on biodiversity studies. Due to long rotation periods, the management of tree biodiversity in forests requires specific approaches. Molecular tools can be used to study this biodiversity and the structure of tree populations in different parts of Europe.
- **Five to ten years:** The biodiversity of pathogens and pests has direct consequence on their spread and, therefore, on their management. This biodiversity needs to be studied, using molecular tools, to identify mechanisms generating new virulent strains/pathotypes. This knowledge can be used to prevent their occurrence by using adapted agricultural practices.
- **Ten to twenty-five years:** Based on validated models of the relevant ecosystems, optimal practices can be identified and delivered. These approaches will include estimates of the impact of these practices on landscape biodiversity management. Core collections should be used to analyse the components of existing biodiversity, with emphasis on agronomically relevant traits and integrating performing alleles into breeding schemes. Wild species related to crops should also be used as new sources of biodiversity for the improvement of agronomic traits in these crops. These genetic resources can be exploited to create new varieties. The analysis of tree populations can help pinpoint the molecular basis of traits of importance (fibre quality, disease resistance, adaptation to climatic changes) and identify the corresponding exploitable genetic resources.
- **Twenty-five years:** Wild species can be transformed into the new crops of tomorrow through molecular breeding for domestication traits.

Goal four: Enhance the aesthetical value and sustainability of the landscape

Another part of any sustainability objective should be the enhancement of the landscape. Land should no longer be viewed solely as a production silo, but rather as complex interconnecting networks and reservoirs of natural resources which can be used for human benefit without long-term damage to the biodiversity that underpins all agricultural and forestry production systems.

Deliverables and research activities include:

- **Five years:** Ornamental plants are an important component of our everyday landscape. Their tremendous diversity needs to be preserved. An inventory of genetic diversity of ornamental plants should be performed, taking into account their regional specificities.
- **Ten years:** Their invasiveness in the environment and possible genetic exchanges with related wild species should be assessed.
- **Twenty-five years:** Improved management strategies can be built on these observations to preserve natural biodiversity of local crops as well as wild species, and to contribute to sustainability issues, such as recycling strategies, energy production, and fire prevention.

Challenge three: Green products

Today, fossil reserves drive the success of the global economy. In Europe, more than 90% of economic activity arises from technologies dependent on coal, gas and oil. Oil is both the source of transport fuels and of the petrochemicals used by manufacturing industries to make the products that underpin our consumer society – from plastics to pharmaceuticals and construction materials. The problem facing our world is that fossil resources are finite: they are likely to be exhausted by a global society that is growing in size and becoming increasingly industrialised. Already, oil prices have reached \$60 per barrel. As oil supplies further decrease, security as well as cost becomes an issue, and a worldwide chemical industry dependent on petrochemical feedstocks must seek alternative sustainable supply chains. This is not a choice, but a requirement – the only question is timing. The world already recognises that the problem is urgent, both from the perspective of fossil fuel reserves and the negative environmental impact that an oil-driven economy is wreaking.

Part of the solution can be provided by tapping into the raw materials provided by green plants. Plants use solar energy, water and carbon dioxide to manufacture simple sugars that are converted in the pathways of primary and secondary metabolism into a vast array of complex chemicals: carbohydrates, oils, proteins, and other products. Plants can provide cost-effective biorenewable feedstocks for sustainable supply chains – fuelled by the sun and dependent only on the manufacturing capacity of the living cells that make up the ‘plant factory’. These supply chains would feed the global chemicals industries, but also include pharmaceutical manufacturers. A clear vision is urgently required for the research and development activities necessary to maximise the utility of these bio-renewable resources. This is particularly relevant given that the EU aims to extract 20% of the raw materials for transport energy from plants.

This challenge focuses on two main goals:

1. Plants as a basis for renewable resources
2. Plant-based pharmaceutical and diagnostic products

These are realistic goals that can be readily achieved, if Europe builds effectively on the expertise it already possesses.

Goal one: Plants as a basis for renewable resources

Improving the efficiency of existing industrial crops and the utility of their products

Plants are already cheap renewable factories for the production of many raw materials and chemicals of considerable value to a wide range of non-food sectors. However, these existing crops and their products can be improved. This improvement relates to the quantity and quality of the raw materials, as well as the post-harvest use of those materials in the supply chains of the different industrial sectors. Improvements can arise from basic agronomy and improved field and forest cultivation methods, breeding to improve yield and robustness in quality of products made, and improved post-harvest technologies that affect extraction, separation and processing to increase the utility of the raw materials that the plants have manufactured.

Fast-track breeding should be informed by post-genomic technologies and the increasing insights that can be gained from systems biology. For immediate European uptake and field cultivation of improved industrial crops, technologies that do not use genetic modification (GM), such as tilling, can be developed. The enabling technologies of bioinformatics, gene discovery and gene function assays that underpin tilling, also provide the knowledgebase for future GM-based crop improvement strategies.

Deliverables and research activities include:

- Research to increase robustness of supply chains, which is essential for chemical industries to take up biorenewable feedstocks: the availability of raw materials and consistency in their quality must be standardised, with minimum impact arising from environmental conditions and the geographical location of production.
- Environmental impact and life-cycle analyses in relation to the raw materials generated in order to maximise the economic and environmental value of their products (minimal input and pollution).
- Study the links between environmental conditions, including future increase of environmental stress through climate change, and adaptation to those conditions in order to standardise the yield and quality of raw materials for each given crop.
- Understand the molecular basis of disease resistance, nutrient use efficiency and the interactions between those traits, yield and fitness for the different industrial crops and forestry species in different environments and under different stresses.

- Improve raw material yields of non-food crops, both cultivated and new ones, through better understanding of the developmental and metabolic constraints on yield of commodity-level products made by plants, such as, oils, fibres, starches, gums, waxes, sugars and amino acids.
- Thorough research to gain an understanding of the controls on flux of metabolites through the different pathways of primary and secondary metabolism, the quantity of defined products made can be altered in an informed way.
- Multidisciplinary research to improve post-harvest extraction, separation and processing technologies for plant-based biorenewables to achieve integrated biorefineries, in which many different crop and forestry species can be used in their entirety, with the activities/functionalities of multiple materials and molecular components retained during extraction and separation.
- Research to understand the plant cell wall that constitutes most of the biomass, and the synthesis and organisation of its polysaccharide, protein and phenolic components; the development of new benign extraction technologies is needed, such as solvents and enzymes to improve access to the cell wall polymers for cheaper release of sugars for fermentation.

The former activities will benefit from and build on research performed under challenge one, goals one, two and three. The latter activities will be planned in close collaboration with the Sustainable Chemistry Technology Platform and its industrial biotechnology section.

Expanding the quality of raw materials and product range of industrial crops – new plant-based raw materials with widened utility

By gaining a greater understanding of how plants function and their inherent plasticity, particularly in terms of their development, metabolism and the impact of the environment on these processes, new opportunities for altering the range of products plants manufacture are likely to emerge. Considerable advances can be made through classical plant breeding and the use of fast-track breeding methods, such as tilling. Changes in the level of expression of different genes can help alter the yields and patterns of metabolites made by the plants. It is an aim of systems biology to understand the plant from a holistic standpoint and develop predictive models for bringing about specific changes. These research advances will be instrumental to the utility of plant-based biorenewables in years to come. Products can be designed that more closely align to the needs of supply chains and end-uses. The plant can also be modified to improve the raw materials for post-harvest processing, such as the biorefining. Significantly, the biosphere has already evolved solutions to many industrial problems and gene discovery programmes should identify new opportunities for increasing the product range of plants through the use of genes from other organisms to modify the plants' metabolism or to manufacture entirely novel products. In contrast to the former applications, these will rely on GM technology. Within Europe, immediate uptake can occur if industrial GM plants are cultivated in strict containment, such as needed for pharmaceutical production. Elsewhere in the world, GM applications for industrial crops are already improving many post-harvest processes, as well as leading to the manufacture of novel biopolymers, fibres and biomaterials.

Deliverables and research activities include:

- Exploiting the complexity of plant biochemistry, through cross-disciplinary research between plant scientists and other disciplines, particularly analytical chemistry and material science, and involving industry and end users, to deliver novel functionalities from existing raw materials.
- New raw material qualities aligned to industrial uses to replace petrochemicals and the supply chains that currently depend on fossil reserves, through modifications to the composition of oils, starches and the many complex 'small molecule' products of the secondary metabolism (metabolic pathway engineering).
- Exploiting biodiversity for entirely new products and qualities. Important research targets are opportunities for the synthesis of monomers for post-harvest polymerisation, the design of new polymers and novel fibre-based products and materials, the large-scale manufacture of industrial enzymes that can be used cost effectively without purification.

Goal two: Plant-based pharmaceutical and diagnostic products

The prevention and treatment of disease is one of the most compelling challenges facing humanity. To ensure the health of our species, effective new medicines should be identified, tested and produced cost-effectively. Plants already represent a valuable resource for natural medicinal products, as well as in the production of pharmaceuticals. This plant-based renewable resource is set to increasingly underpin the future of medicine – as a source of natural medicinal products and as a source of recombinant proteins for pharmaceuticals.

In this goal, as in the preceding goals, it is essential to improve the efficiency of plant production and industrial use of existing medicinal products, as well as to expand the product range, both through building on the plant's own metabolic pathways and through the use of the plants in GM applications to make therapeutic proteins and vaccines.

Plants have a largely untapped potential for mass-producing diagnostics competitively, and for the monitoring and bioremediation of environmental pollutants.

Deliverables and research activities include:

- To manufacture proteins at high yield for (1) new vaccines, for diseases, such as hepatitis B, human papilloma virus, hepatitis C and influenza; (2) monoclonal antibodies, against HIV/AIDS and cancer, (3) other therapeutic proteins, such as HIV microbiocides, peptide drugs, blood proteins and collagens. A key research issue is how to increase rapid large-scale production of the recombinant proteins using GM technologies in scalable containment systems, such as fermenters, hydroponic systems and greenhouse containment, as well as under cGMP.
- Understanding of the factors contributing to flux through the many pathways of secondary metabolism is essential to realising the potential of natural medicinals and antimicrobials delivered through plants. Better understanding of the biology and molecular function of the glandular organs of the plant, including trichomes, which are involved in the production of many medicinal compounds.
- Exploit the potentials of the plant cell factory to deliver diagnostics, such as monoclonal antibodies, on an industrial scale.
- Exploit the exquisite sensitivity of plants to monitor changes to their environments and respond to the stimuli with speed through 'technical plants' to be developed for monitoring purposes, acting as diagnostic biosensors for a wide range of chemical entities.
- Increase molecular understanding of the plant detoxification pathways and how these can be combined in GM applications to increase the efficiency of uptake of environmental pollutants, such as explosives and chlorinated phenolics.

Challenge four: Competitiveness, consumer choice and governance

The successful implementation of the objectives outlined in the previous challenges of this Strategic Research Agenda depends on a strong European resource base: vibrant basic research, skilled and mobile researchers, and access to key research infrastructures.

Vibrant basic research is essential for EU competitiveness, and the Technology Platform's sustainability, innovation, and consumer choice goals are critically dependent on knowledge, tools and technologies and intellectual property derived from basic research. Knowledge and intellectual property will be critical to fulfilling our goals of securing healthy, nutritious and safe food, developing valuable 'green' products, as well as making agriculture and landscape management more sustainable.

Human resources, research infrastructures and networks are three crucial building blocks of this Strategic Research Agenda. This involves the training and flexibility of researchers and scientists, state-of-the-art infrastructures for research and technology development in general, and strong networking both at the European and global levels.

European consumers and their political representatives have a right to understand the intention, the direction and the process of plant science. The plant science community recognises that it can only be effective in responding to society's needs and building economic competitiveness in Europe if the scientific endeavour is matched with a political one. Without a parallelism of purpose, scientific efforts are doomed to flounder in Europe. None of the laudable purposes outlined in the previous three challenges can be achieved in Europe unless the public is engaged.

The ethical dilemma of satisfying consumer choice for high-quality and 'natural' foods and the need for agriculture to fulfil rising food and energy demand in a sustainable manner will likely play a major role in the public debate. The emergence of new products with specific consumer-useful properties may shift the balance of the debate: allergen-free food, such as gluten-free wheat, plants that contain health-associated fish-oils, vaccines, plant bio-fuel or bio-polymers, etc.

Legal and regulatory issues, especially those relating to the safety of the use of plants and the products resulting from innovations in genomics and biotechnology, together with the provision of choices for citizens, are important aspects that need to be addressed in a balanced manner. Any dialogue around these issues must take into consideration a careful weighing of the relative risks and benefits associated with these innovative products compared to the *status quo*. Research can also play an important role in identifying and decreasing potential risks that might be associated with the products of these innovative technologies. For instance, in situations where natural gene flow or cross pollination is deemed undesirable, research could focus on developing more controlled pollination mechanisms and so control or eliminate gene flow. These technologies could be especially important for future 'speciality' crops that may be grown for the production of non-food products, for instance specialty chemicals and pharmaceutical proteins.

The financial environment for private investment in plant sciences and biotechnology depends very much on how markets for these products will develop. At present, plant-related projects can attract some small amount of seed funding in a few EU member states but, in general, commercialisation occurs through large, multinational corporations. While wider funds, proof-of-concept financing, or start-up financing may help to support innovation in this sector, stronger consumer confidence and a regulatory environment supporting open markets for high-technology plant products are likely to be the decisive elements in strengthening investor confidence.

The Technology Platform intends to focus on a number of goals to meet the issues covered in this challenge:

1. Vibrant basic research
2. Human resources, infrastructure and networking
3. Public and consumer involvement
4. Ethics, safety, legal and financial environment

Goal one: Vibrant basic research

The cutting edge of basic plant research is rapidly evolving from understanding the function of single genes to studying networks of genes that control biological processes. This new era of integrative biology enables us to determine how the interconnected networks of genes work together in complex biological processes, how natural genetic variation creates biodiversity. This should ultimately lead to

a paradigm shift in how we breed plants, enabling the rational breeding of plant traits. Basic research is likely to target four deliverables:

1. Genome sequencing and biodiversity, as genome sequences are the primary resource furnishing basic knowledge of a species
2. Plant systems biology aiming to understand how multiple genes function in concert to affect key processes in plant development and environmental interactions, metabolism and physiology
3. Development of improved tools and processes, as advances in biotechnology and genomics are strongly driven by technological innovation
4. Genetic systems for crop improvement, as systems biology research into basic biological processes in model species should be translated to relevant traits in key crops by delineating the molecular basis of genetic systems underpinning crop improvement and innovative agricultural practices. The study of these genetic systems should allow the prediction of 'real world' performance from laboratory studies.

Deliverables and research activities include:

- Major investments in genome sequencing of multiple plant species relevant to Europe, supported by the development of resources and platforms for functional genomics and inventories of natural genetic variation within species as well as among related species. Comprehensive functional genomics programmes should investigate the various molecular levels: the RNA world, the protein world and the metabolome. In addition, appropriate infrastructures are necessary to support the genomics efforts, such as central databases and stock centres.
- Integrated biology research programmes should be established for all basic biological processes relevant to crop productivity and quality, from the molecular to the cellular scale using computational tools for modelling genetic networks that underlie these processes. This research should aid the development and exploitation of new crop properties not apparent from knowledge of the individual components.
- Continued investment to develop improved tools and processes to support basic research and industrial development. This research will be aimed at the development of new tools to support R&D and technologies aimed at the production of industrial prototypes, including the development of novel molecular tools for conventional breeding and innovative transgenic breeding methods. Examples of technologies include integrated genotyping and phenotyping, non-invasive and remote sensing of biological processes, simultaneous process analysis in space and time, high throughput gene transfer and expression testing, predictive screening and directed evolution of genes.
- Examples of what can be achieved include the understanding of the pathways plants use to make small molecules, to extend the repertoire of chemicals produced in crops, and the knowledge of fundamental processes underlying yield stability, flowering time and drought tolerance to enable rational breeding of crops adapted to broader geographical ranges and changing environments.

Goal two: Human resources, infrastructure and networking

Rapidly evolving fields of science and technology are typically driven by young and talented scientists. The proper management of this talent – through training and mobility opportunities – is a critical success factor.

The implementation of the ambitious research programme requires further investment in specialised research infrastructures for high-throughput or large-scale biology research.

Coordination is crucial to the global competitiveness of the European research effort and to achieve the critical mass of resources needed for the realisation of the ambitious goals of the Technology Platform by overcoming the current fragmentation and duplication. This coordination is required at three different levels: between research institutions, between academia and industry and at the international level.

Deliverables and research activities include:

- Training platforms need to be established that are very flexible in subject, capacity and timing to respond efficiently to the needs of scientists and students.
- To attract talented young scientists and counteract the fragmentation of European science, a virtual training network should be created which would link all major research centres in plant biotechnology and genomics in Europe.

- Improving the mobility of scientists between Member States and between academia and industry through post-doc fellowship programmes. ‘Landing grants’ for scientists returning to their countries and exchange grants between academia and industry.
- Specialised centres for genome sequencing and functional genomics.
- Centres for the maintenance and distribution of the collections of genetic resources developed in the different genomics programmes.
- Centres for data storage and curation, outfitted with state-of-the-art databases that allow flexible queries (mining) of data across genomics platforms and plant species.
- The coordination of academic research at the European level could be enhanced by the creation of a virtual centre for plant science research bringing together the leading European groups in plant science within a single dynamic framework.
- Special grants or programmes can be set up to stimulate active interaction between research institutions performing basic research and private companies developing prototypes and commercialising innovations.
- The goals and deliverables set out in the present Strategic Research Agenda provide opportunities for broader international research co-operation and technology transfer with both developed and developing countries. International collaboration would be particularly suitable for high-cost genome-sequencing projects where the main deliverable is fundamental knowledge that is publicly held.

Goal three: Public and consumer involvement

A large proportion of the Technology Platform’s activities will be devoted to involvement with the public. We envisage that each technical programme will have a mechanism that not only provides information but, where possible, allows the public to engage with and influence the course of events.

The challenge is to regain the interest and trust of citizens in plant research and biotechnology. The approach is neither pro-GM nor anti-GM, but it will be decidedly pro-plant. There are, we believe, three key contributors that need to be put in place. They are increasing the knowledge of plants, improving the mutual trust between the public and the plant science community, and making plants fun.

Deliverables and research activities include:

- Knowledge of plants

The key to increasing public knowledge of plants, we believe, is to increase interest in plants. The information strategy that needs to be developed should place plants in the context of everyday life. Plant science is largely paid for from the public purse, and plant scientists need to recognise the necessity of convincing the public that their work has value. We do not want to encourage plant scientists to see this as a professional obligation: we want them to have fun doing it so that the fun and interest inherent in being a plant scientist is also transmitted along with the information.

The publics that we want to address include children, students, gardeners, cooks, herbalists, flower arrangers, golfers, hikers, environmentalists, and other people with a specific or indirect interest in plants. We aim to put in place clearing houses of potential speakers, graphics and presentational aids, a list of organisations which might be interested in talks on plants; and a contact system for bringing the elements together.

- Improve mutual trust between the public and the plant science community

The approach that we aim to adopt is to accept that all discussions start from a position of shared or mutual ignorance, or lack of knowledge. This is easy for researchers to acknowledge: the complete plant genome sequences tell us what we do not know in a precise way.

The advantages of starting from a position of shared ignorance are that initial defensiveness is avoided, knowledge-based decisions are implicitly welcomed but without the antagonism of presupposing whose knowledge that should be, new knowledge is welcomed. A primary thrust of the Technology Platform is the reestablishment of mutual trust between the plant science community, the general public, and the decision-makers who influence both. Rebuilding trust involves increased awareness of public ‘holistic’ thinking, bolstering the involvement of public stakeholders in setting the research agenda and policy directions, and what we have called “the re-humanisation of plant scientists”.

We propose that some decisions on spending on plant research could be taken with the direct involvement of the public at both the local and national levels. We want to give the public a stake in

European plant science. We suggest that training programme should be developed to help researchers effectively engage with the public (engagement, not public relations).

- **Plants are fun**

We want to make plant science itself more engaging and attractive. The political and economic importance of plants means that debates on the subject tend to take a solemn tone. But there is another, perhaps more inviting, side to plants: their fun side.

Leisure and consumerism now occupy a great deal more people and a much greater proportion of most people's incomes than do basic food requirements. In Europe, 'nice-to-have' products outweigh the essentials. Addressing the fun aspects of plants brings European plant science much more in line with current cultural expectations and acceptance, especially among the younger generation.

Goal four: Ethics, safety, legal and financial environment

A major challenge for the EU in the 21st century is to forge an ethical, legal, regulatory and financial framework that will enable scientific progress to improve our collective quality of life and our economic competitiveness, while allowing us to make the choices that most suit our ideals.

The Technology Platform proposes to improved dialogue and actions around ethics, considerations and actions leading to a legal and regulatory environment providing for safety, consumer choice, coexistence of different farming practices and intellectual property rights, and a financial environment encouraging entrepreneurs and industry to invest in plant science research and development.

Deliverables and research activities include:

- Dialogue around the ethics of the growing global 'need' for plant-based foods, feeds and other plant-based renewable materials and EU citizens' desires for choice, aesthetics and naturalness.
- Support legislation that ensures chosen standards of human, animal and environmental safety are met before commercialising innovative plant products. This can be done by providing relevant biosafety research and through better communication with EU citizens.
- Support legislation that provides choice, both for consumers and farmers, through the appropriate provision of information to citizens and through the establishment of fair and practical rules for the coexistence of different products and farming practices.
- Research into competitive options for crop management could include refined farming practices and control measures to control pollen dispersal in space (isolation distance, border row management, control of volunteers and hybrids, modelling and monitoring) and seed and grain dispersal in time (cropping intervals, education and training).
- Improve existing and develop new technologies reducing gene flow, in particular for plants used in non-food applications, such as for producing pharmaceutical products. These include biological containment technologies, improved techniques to achieve male sterility of plants or new approaches, such as apoptosis, split gene technology, plastid transformation, apomixis, sexual dimorphism, and transgene mitigation. A non-genetic approach can be used by using chemical molecules, known as gametocides, which can block, at different stages, pollen development.
- Improve investment in plant research at all levels through better coordination at EU, national and regional level for improved public funding; seek create public/private partnerships to increase private funding and establish novel private investment vehicles aimed at enabling smaller companies to reap the benefits of their innovative enterprises.

3. Towards Implementation of the challenges

The goals that were set out in the Plants for the Future vision document have in general received strong support from all stakeholders. Implementation of the Strategic Research Agenda (SRA) outlined below will need further commitment from public and private stakeholders and authorities at all levels: European, national and regional.

The current draft version of the SRA proposes, in part two, a comprehensive action plan for the next 20 years. Nevertheless, the level of detail varies somewhat depending on the depth of discussion that took place in the preparatory phases. While the research-related objectives in challenges one to three and some other issues, i.e. public/consumer involvement, have been spelt out in depth and detailed recommendations for actions and timelines are given, the level of detail in other sections needs to be fleshed out following a wider discussion with stakeholders.

The Technology Platform will hold, on the basis of this document, a wider consultation among stakeholders and concerned authorities. So-called national consultations are being organised by members of the Technology Platform's executive committee and SRA working groups, in co-operation with relevant national organisations, stakeholders and national authorities, in particular from national or regional research ministries and funding bodies. These consultations aim to allow a wider – and, in particular cases, more in-depth – discussion of the objectives set out in the SRA so as to take stock of current activities contributing to these objectives and to identify future national contributions and actions that could help realise the SRA. These contributions will likely depend on the specific nature of the major plant resources produced by a given country and the particular processing industries it hosts (such as forestry and woods in the Nordic countries).

These national actions will form the building blocks for the development of a detailed Draft Action Plan for the 2006 to 2010 period, together with European research activities as part of the EU's current Sixth and forthcoming Seventh Framework Programmes, coordinated activities of Member States stemming from ERA-Net projects, private research activities, as well as potential public-private partnerships and international projects.

Member State consultations will take part in the second half of 2005 and a detailed Action Plan is expected by mid-2006. The Technology Platform aims to set up a database and internet site by mid-2006 to gather data on all ongoing and planned research activities that contribute to achieving the SRA's objectives. The Platform will analyse regularly the SRA's implementation status. In 2010, it will conduct a detailed progress report for the 2006-2010 period with a view to hammering out the Action Plan for the 2011 to 2015 period.

4. Methodology

General background

The European Council asked in its conclusions following the Spring Council meeting in March 2003 to “create European technology platforms ... to strengthen the European Research and Innovation Area ... in areas, such as nanotechnology and plant genomics”.

Such platforms should bring together stakeholders – such as companies, research institutions, funding bodies and regulatory authorities – at the European level to define a common Research Agenda which should mobilise a critical mass of national and European, public and private resources.



The **Plants for the Future** Technology Platform aims to strengthen the European Plant Research and Innovation Area, mobilising support – both public and private – at the European, national and regional level. It was launched in June 2004 by then European Research Commissioner Philippe Busquin with a document entitled *2025 a European vision for plant genomics and biotechnology*.

Since then, the Platform’s stakeholder forum was developed further to embrace a wide cross-section of companies, research institutions, farmers organisations, regulatory bodies, education and communication experts, as well as financial, consumer and environmental groups.

Using the vision paper as the starting point, the stakeholders have developed this Strategic Research Agenda 2025 to signpost the road to fulfilling this ambitious vision over the next two decades. The Agenda also includes a more detailed Draft Action Plan which will be discussed with EU Member States, the European Parliament and the European Commission during the second half of 2005. It will be amended to take into

account their comments in 2006 and to develop a detailed action plan for the 2006-2010 period.

At the end of this process, the Platform will work to support the implementation of the recommendations in the Strategic Research Agenda and the 2006-2010 Action Plan at the European, national and regional levels.

This will not only have an impact on the plant sector in Europe by creating competitive leadership, it will benefit the environment and meet society’s needs.

Current activities the Plants for the Future platform

The Strategic Research Agenda (SRA) was compiled by four dedicated working groups. Four workshops attended by leading experts and stakeholders were held to help draft the document. These were on Sustainability (4-5 October 2004), Basic Research (6-7 October 2004), Horizontal Issues (19-20 October 04) and Products (2-3 November 2004).

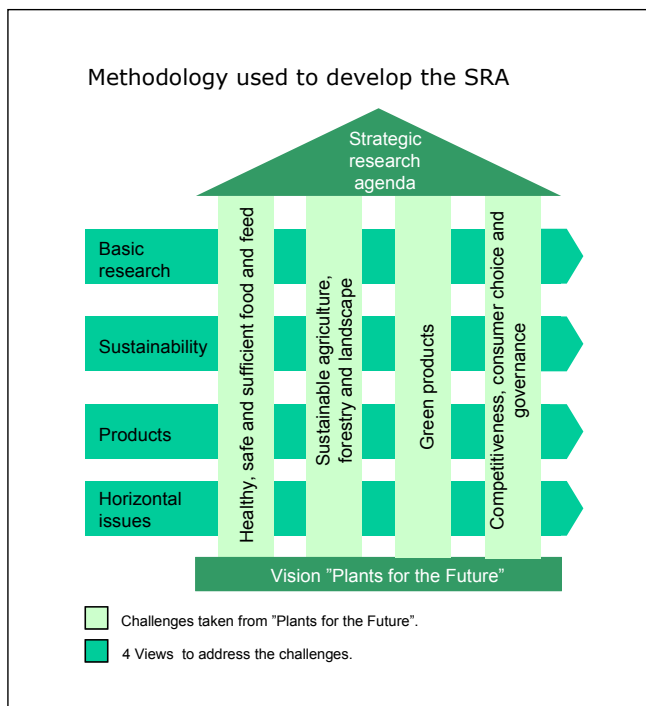
The Agenda is divided into four challenges that reflect the areas identified in the vision paper. These are:

- **Healthy, safe and sufficient food and feed**

Improving living standards and a growing world population are rapidly boosting global demand for high quality and safe food. Food shortages and famines are currently localised phenomena and can be addressed by improving the distribution of the world’s food output. However, as the globe’s 6 billion inhabitants climb to more than 9 billion by 2050, not only will there be more mouths to feed but there will be less arable land with which to do it. This means that food distribution will have to become more equitable and farming will need to become both more productive and diversified. In addition, to respond to consumer expectations, the quality of plants needs to be improved and their nutritional value boosted.

• **Sustainable agriculture and landscape**

Europe urgently needs to make today's intensive agriculture more sustainable while maintaining its productivity. In fact, we need to increase yields and simultaneously reduce or optimise the amount of



fuel, fertilisers, pesticides, labour and water used in the process. The dual challenges of global climate changes and increased seasonal weather instabilities are placing additional strains on the world's agricultural capacity, particularly as more marginal land is farmed.

• **Green products**

Agricultural waste can be reduced to a minimum through the efficient use of bio-waste to produce biomaterials and bio-energy. As we run down our supplies of fossil fuels, we will need to substitute them with renewable and environmentally friendly fuel sources. We will also need to find substitutes for the raw materials that currently come from oil. The traditional uses of plant-based oils, fibres, resins, wood, and so forth will need to be extended in magnitude and scope to counteract the dwindling supply of oil.

In addition, efficient land management will become increasingly necessary to ensure diversity of agricultural production,

protection of the environment and conservation of natural resources and biodiversity.

• **Competitiveness, consumer choice and governance**

A competitive global position for the EU in agriculture, biotechnology and food production will benefit employment and economic growth across the Union. Developing new technologies and agricultural products can help the environment and have a positive impact on rural development. In addition, it would ensure a strong domestic and sustainable European food supply offering consumers a wide choice of healthy and diverse food.

5. Selected glossary

Agri-food sector: the sector of the economy that produces agricultural and food products

Agribusiness: agriculture-related industries

Agro-food industry: agriculture and food related industries

Bio-economy: all industries and economic sectors that produce, manage and otherwise exploit biological resources (and related services, supply or consumer industries), such as agriculture, food, fisheries, forestry, etc.

Biofuels: fuels derived from living organisms, as opposed to fossil fuels

Biomaterials: materials derived from living organisms, as opposed to synthetic materials

Biotechnology: technologies for cultivating, modifying or deriving products from living organisms

Co-existence: the cultivating of conventional, organic and genetically modified crops in the same area without them affecting one another

Genetics: science and technology of hereditary factors

Genetic modification: scientific technique for altering the genetic make up of living organisms which results in genetically modified organisms (GMOs)

Forestry: the cultivation of trees and the management of forests and woodland. Related sectors include paper and pulp industry.

Plant genomics: the science and technology of the genetic make up of plants

6. Working groups

The Working Groups, which were set up by the ETP Steering Council to draft this document, are made up of:

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