China Europe Water Platform CEWP Business and Innovation Program 2019- Priority Market Segment: Industrial Water Use

Key results of CEWP Information meetings in Qingdao and IE Expo, Shanghai April 2019.

Game changers for the market, state-of-the-art technologies and perspectives for building Chinese-European clusters
Executive Summary:

Two information meetings - attended by a total of 100 participants - of the CEWP Business and Innovation Program 2019 priority market: Industrial Water Use were held in Qingdao, 12th April and at the IE Expo in Shanghai 15th April respectively.

The meetings confirmed that Industrial water use is a relevant area for CEWP innovation and business activities, as more than 80% of water resources are used in China for industrial and agricultural activities and capital expenditure on industrial water and wastewater treatment in China is set to increase by nearly 25% over the next 3 years.

The Chinese industrial water market is considered quite conservative and driven by regulatory requirement. Also, the presently low however increasing resource costs may not drive industries towards more efficient solutions. The market however may react to game changers like regulation, climate change impacts, circular economy and digital transformation - and European companies may provide solutions in specific niches and benefit from their experience in integrated system solutions.

The market approach of European companies to the industrial market to a wide extend resembles the water market as such, and lessons learned and approaches suggested by e.g. the EUSME centre and EUPIC are of value as a guidance for European companies to approach the industrial market as well.

The meetings showed Interest from the Chinese participants (both end-users and technology providers) to learn more about European technologies and approaches - with some concrete research cooperation and business opportunities to be developed and explored further by CEWP.

Looking ahead to the upcoming EU-China Business & Technology Cooperation Fair. November 11-13 Chengdu. November 14-15, Qingdao, it seems relevant for the CEWP Business and Innovation Program to focus the presentations and discussion on quite specific niche and integrated technology solutions for industrial water. Also, there is a need to prepare participating European and Chinese partners in the upcoming November meeting to better specify problems and solutions needed - with the view to improve the potential of concrete business cooperation activities.

Overall, and obviously simplified conclusions, crucial to handling the Open Innovation Meetings in November, were:

- Technologies at component level, with quite advanced features exists, but at the same there is a significant gap between the use of these incorporated in solutions, the quite impressive policies eg Water Ten Action Plan, and the macro figures for the state of the environment, water quality, water resources availability, climate change etc: the market doesn't deliver sufficiently.

- This points to market errors in a combination of the following: components not combined into adequate solutions, silo-dimension of policies and trickle down of related budgets not ensuring a holistic dimension of solutions requested via tenders.

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Components not combined into adequate solutions

Silo-dimension of policies and trickle down of related budgets not ensuring a holistic dimension of solutions requested via tenders, notably lack of ensuring energy-efficient solutions.

Lack of appropriate pricing, which includes true costs of operations, both for water, energy and other resources, prevents strong business cases for holistic solutions and doesn't contribute to long-term sustainability.

And, maybe, these deficiencies may be worsened by approach and role the Design Institutes, which doesn't necessarily promote state-of-the-art solutions. This will be examined further.

Finally, lack of adequate Guidance Documents for the local regulators in their work with implementation of national strategies and laws, coupled with lack of appropriate analytical tools to established customized approaches leads to one-size-fits all measures implemented for whole river basins.
Key results of Information Meeting-CEWP Business and Innovation Programme 2019- Priority Market Segment: Industrial Water Use. Qingdao, Shangri-La-Hotel, Friday 12th April 2019 09:00-16:00. (see agenda and speakers in annex 1)

Summary: The meeting attended by more than 70 participants from Chinese and European public and private sectors reviewed upcoming game changers for industrial water management, which will impact the market, state-of-the-art technologies and discussed perspectives for building Chinese-European cooperation clusters.

Shandong Province is a water stressed province and industries take up about 40% of the available water resources. The meeting considered integrated solutions on extended waste water treatment, increased reuse of water, use of alternative sources of water and improved resource and energy efficiencies as effective responses to the challenges. Policy initiatives on industrial regulation and pricing of resource uses, adopting best available technologies (BAT) and good housekeeping and management practices as well as digital transformation techniques were all seen as potential ways forward.

Perspectives for building Chinese-European cooperation clusters were identified in: sludge treatment with biogas production and reuse of resources, reuse of industrial process and waste water, energy efficient waste water treatment, digital transformation solutions and sensor technology.

These options will be further explored and further developed in the CEWP events during the upcoming EUPIC Twin Fair November 11th-15th in Qingdao and Chengdu. (see flyer in Annex 3)
**Session 1. Challenges for Industrial Water use including reuse and wastewater management.**

**Henrik Dissing,** Head of the Business and Innovation component of CEWP introduced the theme of the meeting: Industrial water use as the topic for the activities in 2019. The meeting in Qingdao will be followed up by events organized as elements of the EUPIC Twin Fair November 11th-15th in Qingdao and Chengdu. The aim of the present meeting is to learn more about the industrial water use situation in China, European innovations and technologies on industrial water use, Chinese challenge owners water use problems and Chinese industrial water use technologies. The meeting offered a first opportunity for Chinese and European partners to meet and discuss- with the aim to follow up during the time up to the November meeting and beyond this.

**Mrs Guo Xuwei,** Water Resources Institute of Shandong Province addressed the serious current water resource situation in the province due to low rainfall and limited water resource storages. Industries account for 40% of the water use in the province. Industrial water efficiency has increased in some companies and industrial waste water treatment has been upgraded. The use of unconventional water resources like desalinated water and rainwater and reuse of water has increased. Coastal cities have higher seawater reuse. The price of water is low so there is a limited incentive to invest in reuse technologies. 500 out of 700 companies has been listed as water conservation industries. A few is also listed in the national list. Priority areas to focus on were improved control of water use, test of new technologies, management of water use and resources, potential of Zero discharges from industries.

**Prof. Cheng Lihau,** School of Environmental & Municipal Engineering, Qingdao University of Technology stressed the serious water situation with rising water use combined with lack of water and the need to improve management of waste water and solid waste management. Priority areas mentioned by Prof. Lihau was-classification of water, water quality differentiation, module-based treatment systems. Urban grey water is reused in some areas like parks.

**Dr. Tang Ming,** Qingdao Institute of Bioenergy and Bioprocess Technology, Chinese Academy of Sciences informed about successful treatment of high salinity waste water using membrane systems.

**Dr. Palle Lindgaard-Jørgensen,** IN-Water informed about how high price of water combined with strong enforcement of waste water regulation has led to a general increase of industrial water efficiency in Europe. Adopting Best Available Technologies will gradually improve the adoption of more efficient technologies, and increase industrial water reuse both of process water and treated waste water. Increased industrial water efficiency will help industries better cope with water resource availabilities influenced by climate changes, address circular economy opportunities and lower production costs.

The panel for session one, discussed the factors which will change/influence industrial water efficiency in Europe and China. In general, there was agreement that
industrial water reuse must increase, and that pricing and regulation are important driver for this. Industrial parks have additional possibilities for reuse- if wasted water and resources on one industry can be reused as a resource for another industry. Energy and resource efficiencies of technologies will be important parameters to take in to account.

Session 2: European State of Art Technologies.

Paul Wang, VP of Siveco in China was set up in 2004 in Shanghai. Globally the company have a large number of clients including some water system operators. Siveco China with its 45 engineers is working in China with inspection and asset management and in establishing software systems to support their clients to undertake this task. Paul Wang stressed the need to focus on the life cycle of water technologies and not only the capital investment of the technology itself and that asset management was an instrument to achieve this.

Mr. Wang Baogang, Manager of Product Management and Business Development, KSB SE&Co. KGaA, Germany, a joint venture between Germany and Chinese partners showed examples of valve and pump systems and how these were used in energy saving and intelligent solutions in waste water treatment. Mr. Baogang see new trends in digitalization, resource and energy efficiencies.

Mrs. Zhu Yanjing of IVL China informed that IVL has had operations in China since 1986, and an office in Beijing since 2009. Over the years IVL has been involved in a wide range of different projects — everything from restoring polluted lakes, to introducing environmental technologies and mapping carbon emissions. Together with the TAES research institute IVL jointly own the Sino-Swedish Environmental Technology Development Centre, SEC, which has been charged with introducing Swedish environmental technology in China. Mrs Yanjing recommended membrane bioreactors as a technology to transfer from a wastewater treatment system to a resource facility based on good results in Hammerby in Sweden. Additional information was provided on projects on moving towards closed loop systems in industries (truck operation in Umeå Sweden), and an integrated system research project to optimize water resource systems with reduced energy use and resource efficiencies.

Ms. Ida Henriksen, Danish Water Technology Group a membership organization with 70 members, informed about the Danish Vision 2025 with the vision to assist globally in providing expertise and technologies in the water sector. The members cover a wide range of water technologies and expert areas and have a representative office in Shanghai. Ms. Henriksen presented a project on an energy positive waste water treatment system developed by the Danish Company Danfoss in a Danish city (200,000 PE). Ida also informed about the state of the Art publications of Danish State of Green, many of which are also available in Chinese.

Mr. Alexandre Aceldy, Technical manager of NKE instrumentation a French company. nke Instrumentation designs, manufactures and sells instruments for the measurement and the monitoring of oceans and fresh waters they offer to the Chinese market from their main representative office in Qingdao. NKE
Instrumentation is involved in several research projects, both nationally and internationally, and works in partnership with French scientific institutions. Mr. Aceidy showed examples of in-situ sensor-based environmental monitoring systems can how these can improve the understanding of the water quality situation and be used also in water resources management. In China NKE cooperates primarily with French partners and with universities but plan to approach also Environmental Monitoring institutions. Mr. Aceidy sees perspectives on their technology in China in smart water and sponge cities, groundwater and reused water during lack of water and in BIG DATA.

The Panel of session 2 discussed how industries may deal with challenges from climate change and water demand being higher than the available supply. The meeting considered extended waste water treatment, increased reuse of water, use of alternative sources of water and improved resource and energy efficiencies as effective responses to the challenges. Policy initiatives on industrial regulation and pricing of resource uses, adopting best available technologies (BAT) and good housekeeping and management practices as well as digital transformation techniques were all seen as potential ways forward.

Session 3, Chinese challenge owners and state-of-the-art technologies - cases

Dr. Wang Xiaoxia, from Qingdao Haier Intelligent Technology Development CO is a subordinate to Haier Advanced R&D Centre supporting Hanergy a privately held Chinese multinational renewable energy company with headquartered in Beijing active in solar, wind and hydropower generation, showed how Anamox technology was effective in reducing high nitrate and sulphate concentrations in tailings in powerplants to acceptable levels. The technology was applicable in industrial waste water with high salinity.

Mr. Mingzhang Wang, Senior Specifier of Hempel a company supplying high quality coatings in marine, container, protective and decorative markets, founded in 1992 as a joint venture, showed how coatings can reduce corrosion in water systems including drinking water systems.

Mr. Zheng Xiupheng, Vice Chairman of Qingdao Association of Environmental Protection Industry, gave a welcoming speech introducing the following four association members.

Mr. Liu Shu, Technical director of Qingdao Spring Water Treatment, a private sector company, specializing in sewage/sludge treatment. Spring offers services in consulting, R&D, design, implementation, investment and operation management. Mr. Liu Shu presented their membrane bioreactor system (MBBR type) and showed examples on how the system could achieve high-efficient treatment of wastewater, achieve energy efficiency and solve sludge treatment problems.

Mr. Su Xiaozhong, General Manager of Zhongya Water Treatment, an Ltd. Company established in 2009 selling technology for desalination, waste water treatment, water reuse etc, showed how combined systems of physical and biological treatment systems could reduce waste water problems.
Mr. Zhuang Peijing, General Manager of Qingdao EVU Environmental Engineering, presented a combined system of physical and bioprocesses to reduce odor and emission of organic material in garlic waste water.

Mrs Shao Liqiang, President of Qingdao Shuiqing Muhua Environmental Engineering, presented technologies including mobile systems to deal with sludge containing high concentrations of heavy metals.

Session 4: Open Innovation Meetings and Chinese European Cooperation Clusters.

The Panel discussion of session 4 introduced by Professor Suomodip Sarkar, aimed at identifying Chinese or European problem owners and match these with problem solvers. The panel discussed many problems and potential solutions, and in to the need for the problem owner to be more specific in characterizing their problem and exactly what a problem solver is expected to be able to deliver in terms of technology performance.

Perspectives for building Chinese-European cooperation clusters were identified in: sludge treatment with biogas production and reuse of resources, reuse of industrial process and waste water, energy efficient waste water treatment, digital transformation solutions and sensor technology.

The following initial problems and responses from solution providers were listed.

Qingdao Shuiqing Muhua Environmental Engineering looked for solutions with high content of metals in sludge and the need to reuse sludge. The Danish Water Technology Group has a number of members with experience in this field.

Danish Water Technology Group has 40 members interested in the Chinese market. Both distributors of technology and Joint Ventures are looked for.

Reuse of water and resources were listed as a problem for which solutions were looked for by a number of Chinese participants.
Key results of the Information Meeting-CEWP Business and Innovation Programme 2019 - Priority Market Segment: Industrial Water Use. IE Expo China, 2019 Pavilion E1, Room M13, La-Hotel, Monday 15th April 2019 13:00-16:00. (see agenda and speakers in annex 2)

Summary: The meeting attended by about 30 participants from Europe, China and international countries concluded that the Chinese industrial wastewater sector is definitively an area with major business opportunities and that European SMEs can find opportunities introducing engineering solutions that allow Chinese plants to have a better industrial process, to save water consumption, and reduce Operation and management daily costs. Capital expenditure on industrial water and wastewater treatment in China is set to increase by nearly 25% over the next 3 years.

The Chinese industrial water market tends to be quite conservative sticking to well proven technologies and the business case for investment in reuse and energy savings is often not good due to the present low water and energy prices. While integrated system solutions may be a selling point for European technology providers the market tends to ask for single technologies.

To be successful, EU Companies will have to find the niches in which their expertise and premium technology are valued and there are clients with the financial resources to procure their services. If companies are doing it right, the opportunities will outweigh the challenges. Such niches could be energy optimised sludge and waste water treatment, resource reuse and industrial parks water and wastewater technology and resource use.

Doing it right means in selected niches requires and understanding of who the real clients and key partners are and which actions need to be taken at which stage of the procurement process; from profile raising and intelligence gathering to positioning, partnering, tendering and the delivery of projects.
Session one-challenges for Industrial Water Use, including re-use and wastewater management.

**Henrik Dissing**, Head of the Business and Innovation component of CEWP introduced aim of the meeting to learn more about the industrial water use situation in China, European innovations and technologies on industrial water use, Chinese challenge owners water use problems and Chinese industrial water use technologies. The meeting offered a first opportunity for Chinese and European partners to meet and discuss— with the aim to follow up during the time up to the November TWIN-Fair meetings in Chengdu and Qingdao and beyond this.

**Mr. Yuanchao Xu**, China Water Risk. CWR is a non-profit organization launched in 2011 to foster efficient and responsible use of the China’s water resources by engaging the global business and investment communities in understanding and managing China’s water risk. Mr. Xu informed that industrial and agricultural sectors in China are the largest polluters, plus account for over 80% of national water use. Mr. Xu informed that 45% of China’s GDP occurs in the 11 driest provinces. Some industrial sector only create a limited economic output— however use significant amounts of water and discharge large volumes of polluted waste water. CWR are involved in advising at basin and provincial level on the importance of creating the largest economic value from water use.

**Dr. Palle Lindgaard-Jørgensen**, IN-Water informed about how pricing and strong enforcement of waste water regulation has led to increases of industrial water efficiency in Europe. Best Available Technologies has led to more efficient technologies, increased industrial water reuse both of process water and treated waste water.

Dr. Lindgaard-Jørgensen informed about some of the preliminary results of the CEWP meeting 12th of April on challenges in solving waste water treatment problems (desalinization, highly saline waste water, desulphurization, optimizing sludge treatment and reuse of sludge with high content of heavy metals, brewery water use reduction, evaporation technologies, sensors to detect pollutants, digitalization, asset management). Much focus in China is on waste water treatment technologies to solve environmental problems, while there is little focus in China on energy efficiency of treatment technologies and on resource efficiency and reuse of resources.

**The Panel of Session one** discussed industrial water management problems in industrial Parks and sludge treatment. There was general agreement that the industrial parks provide opportunities for better water management because same sector industries can use the infrastructure of the parks. The experience however is that the industrial park owners often both design and operate the facilities themselves, and often do not involve external expertise in managing and operating the facilities. The potential of one industry using the waste or water as a resource for another industry in the industrial park seems not to be much practices. Also there was agreement that developing a circular economy approach to sludge handling with heat and electricity production and reuse of resources like phosphorus is a challenge...
in China and that there is good European experience in this field which could be used.

**Liam Jazci**, EU SME Centre, a project funded by the European Union in 2010 to help European small and medium-sized enterprises (SMEs) get ready to do business in China, informed that the Chinese industrial wastewater sector is definitively an area with major business opportunities. European SMEs can find opportunities introducing engineering solutions that allow Chinese plants to have a better industrial process, to save water consumption, and reduce O&M daily costs. Capital expenditure on industrial water and wastewater treatment in China is set to increase by nearly 25% over the next 3 years.

China wants to access best international practice that can be demonstrated to turn risk of loss into potential for growth, but there are many knowledge, language, culture, IPR and financial barriers to overcome. There are complex planning and procurement procedures for foreign companies to negotiate and certain areas of the market will be inaccessible. To be successful, EU Companies will have to find the niches in which their expertise and premium technology are valued and there are clients with the financial resources to procure their services. If companies are doing it right, the opportunities will outweigh the challenges.

Doing it right means to understand who the real clients and key partners are and which actions need to be taken at which stage of the procurement process; from profile raising and intelligence gathering to positioning, partnering, tendering and the delivery of projects. These are likely to be quite different to typical European client expectations. This will mean doing research and listening very carefully to what potential clients are saying. Though the greatest skill that Europeans have is the ability to efficiently manage complex integrated systems, this can be very difficult to explain to Chinese clients. Therefore, Mr. Liam advice European companies to express themselves in simple terms.

**The Panel discussion of session two** focussing on market barriers for State-of-the-Art Technologies agreed that while the water marked I China is large, the level of playing field is not easy for European companies and the situation is not expected to improve soon. However, for innovative European company the panel felt that it would be wise for European companies to follow the Chinese market not only for commercial reasons, but also to follow new innovations taken place in the market. How fast the development and innovation take place in China depends to a wide extent of the profitability in the market. If new profitable industrial water technology markets appear in China, the Chinese companies is likely to be able to develop the technologies needed quite fast- also opening up for cooperation with European partners.

While European companies are well known for their ability to deliver integrated solutions it may be difficult to sell in the market, as companies and tend to be conservative. Integrated thinking may still however be a selling point and differentiator for European companies. Also, digital transformation is expected to be a game changer in the industrial water market in China.
Session 3. Open Innovation Meetings

Professor Sumodip Sarkar introduced open innovation as a model and internationally to develop new products and services. He stressed the importance of problem owners and solution providers to meet and discuss in the CEWP Business and Innovation program meetings, as a basis for open innovation and business development.
Information Meeting - CEWP Business and Innovation Program 2019 – Priority Market Segment: Industrial Water Use

Draft Program

Session one – Challenges for Industrial Water Use, including re-use and wastewater management

09:00-09:10 Welcome remarks, Henrik Dissing, CEWP & EUPIC

09:10-09:25 Water Saving Champions in the Industrial Sector, Management of Water Use, Guo Xuwei, Water Resources Research Institute of Shandong Province (WRISD)

09:25-09:40 Prof. Cheng Lihua from School of Environmental & Municipal Engineering, Qingdao University of Technology will give a speech on Industrial Waste Water Treatment & Usage

09:40-09:55 Prof. Tan Ming, the Qingdao Institute of Bioenergy and Bioprocess Technology, Chinese Academy of Sciences

09:55-10:10 Water Technology Innovation in Europe, Palle Lindgaard-Jørgensen, IN-Water

10:10-10:40 Panel Debate reg Game Changers for the Water Sector - Setting the scene for challenges and opportunities

Tea Break
Session two - European State of the Art Technologies

11:00 - 11:15 Siveco (France)

11:15-11:30 KSB (Germany)

11:30-11:45 IVL (Sweden)

11:45-12:00 Danish Water Technology Group (DK)

12:00-12.15 NKE Instrumentation (France)

12:15-12:30 Panel Debate, Innovation for Future

Lunch

Session three – Challenge Owners, Cases

13:30-13:42 Dr. Wang Xiaoxia from Hair Energy will give a speech on Application of anammox technology in the treatment of desulfurization and denitrification tailings of thermal power plants

13:42-13:54 Mr. Wang Wei, General Manager of Galop Consulting will give speech on waste water treatment demands on Energy and Power industry, and problems met when collaborating with EU companies

13.54-14.06 Ms. Mingzhang Wang, HEMPEL Paints, Corrosion challenges in water treatment, solutions about corrosion protection.

14:06-14:18 Mr. Zheng Xiupeng, vice president of Qingdao Association of Environmental Protection Industry will briefly introduce the association.

14:18-14:30 Qingdao Spring Water Treatment will introduce MBBR Technology
14:30-14:42 Mr. Su Xiaozhong, General Manager of Zhongya Water treatment would like to give speech about their technology and demands

14:42- 14:54 Qingdao EVU Environmental Engineering will share their cases on Garlic Wastewater Treatment

14:54-15:06 Qingdao Shuiqing Muhua Environmental Engineering will deliver a speech

15:06-15:20 Tea Break

**Session four – Open Innovation Meetings and Forming of Chinese European Co-operation Clusters**

15:20-15:30 CEWP Business and Innovation Program 2019, Upcoming Events, Henrik Dissing, CEWP

15:30-15:50 Open Innovation Meetings, introduction to the concept, Soumodip Sarkar, University of Evora, Portugal

15:50-16:50 Panel Discussion and Group Session

CN: Galop Consulting, Zhongya Water Treatment, Qingdao University, Tsingdao Brewery

EU: Siveco, KSB, IVL, DWTG, NKE

**Session five – Closing Remarks**

16:50 - 17:00 Conclusions and next steps

Information Meeting - CEWP Business and Innovation Program 2019 – Priority Market Segment: Industrial Water Use

Despite the existence of excellent water sector technologies, the solutions implemented today doesn’t sufficient adress the serious and accellerating challenges coming from climate change, energy efficiency needs, circular Economy approaches etc. Innovations adressing cross-sector solutions and change of the regulatory framework conditions as well getting pricing right is pivotal to deliver society needs in the coming years.

Industrial production will be subject to a number of game-changing factors, which will impact the water technology solutions dramatically. These factors include climate change, resilience to changes in supplies, circular economy, regulatory requirements reg water use and wastewater discharges as well as digital transformation.

The China-Europe water platform (CEWP) will organize a half-day information session and workshop focusing on Industrial Water Use. We will review upcoming game changers for the market, state-of-the-art technologies and discuss perspectives for building Chinese-European clusters.

Contact
Mr. Henrik Dissing
Program Manager, Business and Innovation
China Europe Water Platform
Danish Environmental Agency
hedis@mst.dk
Tel: +45 4178 2030

Program information
Time: Monday, 15th April, 2019, 13:00 – 16:00
Location: Pavillion E1, Room M13
Language: English
Co-organizers: EU SME Center

Session one – Challenges for Industrial Water Use, including re-use and wastewater management
13:00-13:15 Welcome by Henrik Dissing, CEWP
13:15-13:30 Improving Water Quality and Managing Industrial Water Use, Yuanchoa Xu, China Water Risk
13:30-13:45 Water Technology Innovation in Europe, Palle Lindgaard-Jørgensen, IN-Water
13:45-14:15 Panel Debate with Yuanchoa Xu, China Water Risk, and Palle Lindgaard-Jørgensen, IN-Water

Tea Break

Session two – Market Barriers for State of the Art Technologies
14:30-14:50 Liam Jazcii, EU SME Centre, Market Access to China, new measures on China’s further opening up and reform, major policies, challenges and obstacles for SMEs to enter the market and emerging opportunities
14:50-15:15 Panel debate with Liam Jazcii, EU SME Centre, Alexandre Aceldy, NKE Instrumentation, and Grace Xu, Grundfos

Session three – Open Innovation Meetings
15:15-15:30 Open Innovation Meetings, introduction to the concept, Soumodip Sarkar, University of Evora
15:30-15:50 Panel Debate with Yuanchoa Xu, China Water Risk, Palle Lindgaard-Jørgensen, IN-Water, Alexandre Aceldy, NKE Instrumentation, and Grace Xu, Grundfos
15:50-16:00 Closing remarks by Henrik Dissing

Elements of CEWP activities at the Twin Fair in Chengdu and Qingdao, November 11th-15th, 2019:
• Open Innovation Meetings based on challenges identified at Information Meeting held on April 12th and 15th
• Formation of ”clusters” / ”partnerships” around the challenges to be continued @CEWP Annual Meeting in Lisbon, dec 2019
• B2B matchmaking, facilitated by EUPIC/EEN method
• Opportunity for companies to set up boot at exhibitions