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Master's Thesis- Master Sustainable Business and Innovation  
***Mission-Oriented Innovation Systems (MIS)***

The Dutch transition to a CE in the Flexible Plastic Packaging  
Industry

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## ABSTRACT

Plastic pollution has been in the spotlight for over a decade. Plastic packaging floods retail shelves due to its useful material properties. The negative environmental impact of such products has already been discussed widely, with significant actions being initiated to manage flexible plastic packaging and closing the resource loops. By building on the Mission-Oriented Innovation Systems (MIS) framework, this master's thesis aims to comprehend the main drivers and barriers to achieving a Circular Economy for the Dutch flexible plastic packaging industry.

MIS is defined as the net of agents and institutions that assist to the acceleration and dissemination of innovative solutions to determine, seek, and achieve a societal challenge (Hekkert, Janssen, Wesseling, & Negro, 2020)

The approach includes a problem-solution diagnosis, where the four pathways [mechanical and chemical recycling (MR, CR), bioplastics, and reusables] are identified by assessing the implementation of the NL Plastic Pact. A thorough structural analysis based on the literature review follows. The main actors in the flexible plastic packaging value chain are waste suppliers, producer responsibility organizations, recyclers, converters, and third parties. The functional analysis is executed through a historical event analysis approach, where events are gathered chronologically to capture the bigger picture of the transition's drivers and barriers.

Notably, the historical event analysis indicated that MR is driven by high experimentation, high problem directionality, and market creation. However, the path's barriers are associated with limited reallocation of resources and medium coordination. For CR, what leads its development is mostly the high solution directionality, the creation of coalitions, and the high experimentation. What disrupts its further development is the low problem directionality and the almost nonexistent market creation. Additionally, bioplastics' development is associated with the high experimentation and the incorporation of such products in companies' portfolios. Nonetheless, low solution directionality and low legitimacy are considered the main barriers. Finally, reusable, flexible plastic packaging is driven by high problem directionality and extended legitimacy over reusability. However, knowledge development seems to be lacking, with low experimentation and almost inexistent market creation.

Several interconnections affect paths' development and the overall mission. First, MR and CR have a complementary relationship. However, the further development of CR may destabilize MR in the mission. Secondly, a mutually reinforcing relationship between bioplastics and MR also exists. On the one hand, the two paths have a symbiotic relationship. On the other hand, the two paths experience a competing relationship. Finally, MR occupies a significant share in the mission, resulting in the neglect of reusability.



## 1. INTRODUCTION

Plastic pollution has become a crucial issue for humanity as a result of its severe impact on marine ecosystems and wildlife (IBERDROLA, 2021; Ukaogo, Ewuzie, & Onwuka, 2020; Wilcox, Mallos, Leonard, Rodriguez, & Hardesty, 2016). Plastic pollution also negatively impacts on soil by influencing the organisms living within the soil and the interconnected ecosystem (Chae & An, 2018). Additionally, 12.7 million tons of plastic are disposed of in the sea each year by coastal countries (Critchell et al., 2019). However, plastic is a polymeric material; its large molecules, which develop strong chains, are non-degradable and extremely durable in many environmental conditions. For these reasons, it is considered one of the most multifunctional materials for a variety of uses (Andrady & Neal, 2009). Due to these properties and strong demand, many lightweight single-use products are being continuously manufactured, accounting for 50% of the total plastic production (Jambeck et al., 2015). In particular, flexible plastic (not rigid, able to be bent), is the most common material in many industries, especially in the packaging industry (Niaounakis, 2019). However, the established plastic waste management system cannot correctly process all types of flexible plastic packaging due to either general misconceptions about the product's recyclability or shortages in technological machinery and knowledge (Hopewell, Dvorak, & Kosior, 2009). Nonetheless, the poor coordination and collaboration among the participants within the flexible plastic packaging value chain make any transformation of the recycling system more difficult (Elzinga & Hekkert, 2020). Hence, the socio-technical nature of the problem constitutes it as a topic of great importance, while facilitating the orchestration and direction of multiple participants denotes an issue of great complexity.

In Europe, the environmental impact of plastic pollution and flexible plastic packaging has already been identified and attempts are being made to address the problem. The European Union (EU) has implemented the European Green Deal to transform the EU's economy into a more sustainable one (European Commission, 2019). As part of the Green Deal, the EU's Circular Economy (CE) Action Plan aims to create a cleaner and more competitive Europe. In terms of flexible plastic packaging, the EU has already announced that all plastic packaging must be either recyclable or reusable. To accelerate the transition to a CE, the European Plastic Pact has also been formed to bring all the parties in the whole value chain together, with the aim of initiating and supporting the transition towards the aforementioned objectives (European Commission, 2020). Within the Netherlands (NL), a considerable number of actors have signed the pact, while the country has committed to become totally circular by 2050 (NL Plastic Pact, 2019). Additionally, all plastic packaging in the Dutch market will become reusable wherever possible and, moreover, 100% recyclable. A 20% reduction (in kg) in plastic material and the use of at least 35% recycled content will also be required for companies using plastic (NL Plastic Pact, 2019).

In this regard, on the 8th of July 2020, the workshop "Circular Plastic Packaging" was held by Rijkswaterstaat and the Copernicus Institute of Sustainable Development of Utrecht University (Elzinga & Hekkert, 2020). The workshop aimed to map the sector's case for transitioning to a CE. In the workshop, the Mission-Oriented Innovation System (MIS) was applied, and the functionality of the system was investigated. The framework can be defined as *"the network of agents and set of institutions that contribute to the development and diffusion of innovative solutions with the aim to define, pursue, and complete a societal*



*mission*" (Hekkert et al., 2020, p. 77). During the workshop, four pathways were investigated regarding progressing plastic packaging towards the conditions of a CE: 1) Maximizing plastic collection and recycling (in volumes), 2) Using recyclates as much as possible, 3) Minimizing plastic use, and 4) Reusing plastic packaging (Elzinga & Hekkert, 2020). The outcome of the workshop indicated that while the mission seems to have already begun accelerating, several obstacles have appeared along the way, which must be overcome for the NL to totally transition to a CE in the flexible plastic packaging sector.

Consequently, the aim of this master's thesis is to accelerate the transition of the Dutch flexible plastic packaging sector to a CE. The ways in which the workshop perceived the transition by using the MIS framework are taken as inspiration, and the drivers and barriers of the system are identified. This is accomplished by carrying out a historical event analysis of the Dutch flexible packaging sector from 2015-2021 to obtain in-depth insights into the drivers and barriers that stimulate or hamper the transition. By using the workshop's operationalization as a reference and applying the MIS framework, this master's thesis attempts to answer the following research question:

*"What are the main drivers and barriers to a Circular Economy for flexible plastic packaging in the NL?"*

By providing insights into the main drivers and barriers to a CE, more concrete recommendations and directions for accelerating the transition to a CE in the flexible plastic packaging sector can be formulated. Furthermore, this case is one of the few empirical cases in which the MIS framework is applied. The social relevance of the thesis is to achieve the acceleration of the CE transition so the reduction of plastic waste can proceed effectively.



## 2. THEORETICAL FRAMEWORK

In the following section, the theoretical background relevant to the case of the transition to a CE in the NL for the flexible plastic packaging sector is explained. The necessity of perceiving the system as a socio-technical one is highlighted, while the exploration of possible frameworks to support the analysis are further investigated. A brief comparison of the existing frameworks and their limitations in capturing the mission is also presented. Finally, the choice of the MIS framework as the most appropriate framework for the analysis of this particular case is discussed.

### 2.1 Sustainable Transitions in Socio-Technical Systems

Socio-technical systems are strongly characterized by complexity. The processes within those systems are dynamic and highly interconnected (Vespignani, 2012). Such systems include multiple components whose relationships, directly and indirectly, affect the systems' behavior (Norman & Stappers, 2015). The literature reveals several components that affect these socio-technical systems, both in a technological and a social manner (Carayon, 2006; Pasmore, 1988; Rizzo, Pasquini, Di Nucci, & Bagnara, 2000; Wilson, 2000). The main characteristics of socio-technical systems are complexity, diversity, uncertainty, and resilience (Saurin, Righi, & Henriqson, 2013). To manage such complex systems, non-linear approaches should be adopted. These approaches integrate the necessary management of individuals and technologies, both within the industry and society (Norman & Stappers, 2015). The transition from linear to non-linear approaches in socio-technical systems is a long process that requires time (Griffith, Sawyer, & Poole, 2019), and it is typically characterized by multi-dimensionality and co-evolution (Köhler et al., 2019). This kind of transition is also referred to as the sustainable transition of the socio-technical system (Loorbach, Frantzeskaki, & Avelino, 2017; Markard, Raven, & Truffer, 2012). The direction of the transition depends strongly on the timing and nature of the interaction (Geels & Schot, 2007), while innovation relies mostly on the components and their interrelations, which constantly reinforce each other and the system in general (Schwabe & Krcmar, 2000). The importance of integrating innovation into tackling socio-technical issues is essential for any transformative process within those systems (Schot & Steinmueller, 2018). Innovation should work as a response to any societal challenge, and such a response requires transformational change (Ghazinoory, Nasri, Ameri, Montazer, & Shayan, 2020; Schot & Steinmueller, 2018).

The dynamics in the systems that drive transitions do not take place at the system level but at the micro level, where the system's components interact (Weber & Rohracher, 2012). This notion allows an insightful understanding of the way in which transitions in the whole socio-technical systems emerge and the relevant barriers that might hinder that transition. Transformative policies recognize the difficulties in shifting the direction of innovation in such systems, which are characterized by path dependencies, and have already analyzed the transformational failures of those systems (Schot & Steinmueller, 2018; Weber & Rohracher, 2012). The main reasons a system may fail to transition are directionality failures, demand articulation failures, policy coordination failures, and reflexivity failures. Each of those failures is strongly associated with some failure in the fulfillment of the system's activity (Raven & Walrave, 2020). Therefore, it becomes clear that to achieve any transition at a system level, technological development by itself is insufficient. A fundamental transition requires social and political alterations as well (Pyka, 2017).



In this regard, the relationship between plastic packaging and society is co-evolving in such a way that any transformational process within that system should be considered socio-technical (Evans, Parsons, Jackson, Greenwood, & Ryan, 2020). To achieve transformation in such a system, shifting the perspective of heterogeneous elements (firms, consumers, technologies, policymaking) is essential and requires the constant investigation and identification of the networks to which the plastic packaging belongs (Evans et al., 2020). Several frameworks investigate the sustainable transition of socio-technical systems by focusing on the different boundaries of the systems. Multi-level perspective (MLP) and technological innovation systems (TIS) frameworks are two of the most frequently used frameworks and are briefly described in the following sections.

## 2.2 Multi-Level Perspective Framework

The MLP framework works on capturing the sustainability transition in existing systems by dividing it into three levels of analysis: the so-called socio-technical regimes, niches, and landscapes (Geels, 2010; Geels, 2011). MLP is a systematic approach that aims to capture the socio-technical dynamics that lead to change and explores the interconnections between radical innovation in the niches and incumbent regimes (Kemp, Schot, & Hoogma, 1998; Seyfang & Longhurst, 2016).

The first level of analysis, namely the socio-technical regime, is defined as “the ‘deep structure’ that accounts for the stability of an existing socio-technical system” (Geels, 2011, p. 5). This structure involves the principles and processes that influence the social groups’ actions in recreating the multiple elements of the system (Geels, 2011). Path dependencies, which characterize regimes, lead them to inertia and the so-called lock-in, with incremental changes in specific, pre-existing trajectories mainly being the case (Geels, 2011). These trajectories do not explicitly refer to technological solutions only but also include behavioral, cultural, and political aspects (Geels, 2011).

The second level of analysis of the framework includes the socio-technical niches. Niches are spaces in which innovation emerges and is developed on safe grounds, with the suitable institutional context also transpiring (Fuenfschilling & Truffer, 2014; Geels & Schot, 2007; Raven, Schot, & Berkhout, 2012). The protective nature of the niches is associated with regulatory schemes or prevailing preferences in specific segments (Smith & Raven, 2012), such as NGOs and cooperatives, R&D teams, and special projects (Fuenfschilling & Truffer, 2014).

The third level of MLP is the socio-technical landscape. This level represents the external environment of the sector under study (Geels, 2011; Geels & Schot, 2007). Any incident occurring at the landscape level affects both the regime and niche levels by potentially transforming social structures. Hence, MLP suggests that a socio-technical transition is taking place when pressure is exerted on the regime by changes in the landscape level, which either reinforce or destabilize it (Geels & Schot, 2007). Additionally, the socio-technical niches allow for the development of an institutional environment that is stable enough to compete with the established regime (Fuenfschilling & Truffer, 2014). Depending on the timing, the adaptive capacity of the regime and the reinforcing or disruptive nature of the niche and landscape changes taking place may have a negative or positive impact on the system (Geels & Schot, 2007).





### 2.3 Technological Innovation Systems Framework

Innovation is more likely to successfully occur as a collaborative activity, reflecting the synergy among all the actors necessary to introduce a novelty into the market (Hekkert, Negro, Heimeriks, & Harmsen, 2011; Vasseur, Kamp, & Negro, 2013). Bergek, Jacobsson, Carlsson, Lindmark, and Rickne (2008) define TIS as socio-technical systems oriented in the development, diffusion, and use of a particular technology. They entail a network of agents (actors, institutions, organizations) that interact with each other under a specific institutional infrastructure and positively influence the generation, diffusion, and utilization of a particular technology (Hekkert, Suurs, Negro, Kuhlmann, & Smits, 2007). The TIS approach posits that those incentives for technological change do not only occur within the firm's boundaries but also within the innovation system to which the firm belongs. It is the innovation system that determines both the rate and direction of the socio-technical change in the form of the technological trajectory that would be the most easily diffused (Hekkert et al., 2007). The TIS framework aims to identify the dynamics among the system's structural components, which are defined as the actors, institutions, and the networks/interconnections that exist between them. Despite the fact that those actors are operating within their own business ecosystems, their decisions and actions strongly affect the totality of the TIS attempting to emerge and diffuse. The interlinkages between them uncover the dynamic nature of the system and require the progressive comprehension of those actors' relationships, rather than a static one (Bergek et al., 2015; Hekkert et al., 2007). These interlinkages are significantly reinforced by the innovation intermediaries, whose role is to connect, translate, and facilitate knowledge within the system (Howells, 2006; Moss, 2009; Van Lente, Hekkert, Smits, & Van Waveren, 2003). Thereby, the approach is oriented to assessing the relevant activities that contribute to the diffusion and implementation of innovation within the system, the so-called system functions. These functions are dependent on each other and can also weaken or reinforce the system. The most popular set of functions of TIS are Function 1) entrepreneurial activity, Function 2) knowledge development, Function 3) knowledge diffusion, Function 4) research guidance, Function 5) market formation, Function 6) resource mobilization, and Function 7) creation of legitimacy/counteract resistance to change (Hekkert et al., 2007; Negro, Hekkert, & Smits, 2007; Suurs, Hekkert, & MP, 2005). Hekkert et al. (2011) have argued that technological systems involve artifacts that are integrated into specific infrastructures. The structure of TIS include several technological trajectories, hence, a set of technologies developing in a particular direction. Those trajectories consist of the techno-economic features of costs, safety, and reliability, which are essential feedback mechanisms operating between technological and institutional change (Hekkert et al., 2011; Suurs, 2009). Depending on which phase of development to which each trajectory belongs, a different set of functions is essential for the technology to progress in the respective phase. These phases are categorized as the predevelopment phase (where no working prototype has emerged yet), the development phase (where commercial application occurs), take-off (where market growth takes place), and acceleration (where saturation occurs; Hekkert et al., 2011). The different sets of functions that determine each phase of development and the interconnections among them are presented in Figure 1.

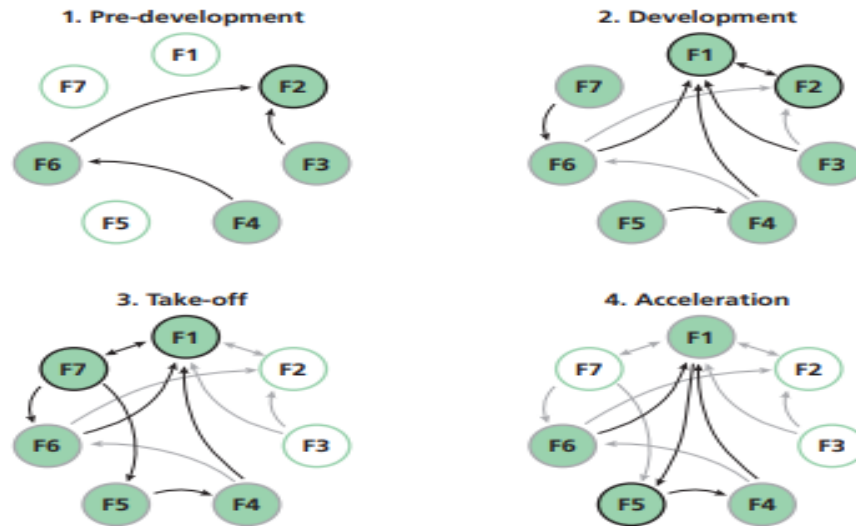


Figure 1: Functional Patterns per Development Phase  
Source: Hekkert et al., 2011, p. 12

## 2.4 The Necessity of a New Framework

Transformational change involves socio-institutional change, which further entails alterations in regulations, standards, and behaviors (Geels, 2002). Hence, transformational or sustainability change is much more complex because it calls for the normalization of new structures and what the system perceives to be legitimate (Fuenfschilling & Truffer, 2014). Despite this, in CE transitions, where the main goal is to shift from a linear to a circular system, there are three types of transformation models (Table 1), and in the case of the plastic packaging domain in the NL, socio-institutional change rather than technological innovation is considered to be of the greatest significance. In such a case, the system does not build up to a radical innovation but rather entails the constant coordination and collaboration of the actors to pursue the desirable transition (Potting, Hekkert, Worrell, & Hanemaaijer, 2017). While the transition to a CE in the Dutch flexible plastic packaging sector includes various solutions, whose dominance is still unclear, the TIS framework can only be used to analyze each solution separately, thereby, missing the totality of this societal challenge (Elzinga, Negro, Janssen, Wesseling, & Hekkert, 2020; Suurs, 2009). In addition, the MLP framework can only capture missions associated with more generic societal functions, rather than those with numerous societal functions or those that focus on explicit challenges (Hekkert et al., 2020).



Table 1: The Three Circular Economy Transition Models (Potting et al., 2017)

CE Transition Models	DEFINITION
<b>Based on a radical new technology</b>	The new technology is central for the transition to be achieved and for a totally new product to be developed
<b>Based mainly on socio-institutional change</b>	Technological innovation plays a minor role. The focus is on incremental innovation in core technologies
<b>Based on socio-institutional change combined with enabling technologies</b>	The transition from owning the product to purchase its services mainly involves socio-institutional change but the presence of the technology is also crucial

Consequently, for the NL to become totally circular, a new circular strategy should be developed. A circularity strategy can be characterized as either low or high, depending on the urgency of the corresponding socio-institutional change or innovation in technology. Therefore, high circularity strategies (i.e., becoming fully circular) usually demand a socio-technical alteration in the product chain, while low circularity strategies are used for radical technological innovation (Potting et al., 2017). For all these reasons, Hekkert et al. (2020) have proposed the MIS framework. It is defined as “the network of agents and set of institutions that contribute to the development and diffusion of innovative solutions with the aim to define, pursue and complete a societal mission” (Hekkert et al., 2020, p. 77), and it differentiates itself from other models through the way it sets the system’s boundaries and the way in which the interactions emerge (Hekkert et al., 2020).

### 2.5 Mission-Oriented Innovation Systems

The MIS framework is considered to be able to more appropriately capture the societal challenge of transitioning to a CE in the NL's flexible plastic packaging domain. The NL aims to become less dependent on raw materials by focusing on the transition to recycling technologies, product reuse, and corresponding business models (NL Plastic Pact, 2019). MIS is a problem-oriented framework, therefore, the actors involved, and possible solutions may not be revealed at first glance, rather it is the prioritization of the problems that formulate the direction of the mission. A mission requires both technical and behavioral innovations (Hekkert et al., 2020; Kattel & Mazzucato, 2018), which means a set of multiple solutions to one challenge is required rather than one ultimate solution. To properly analyze an MIS, the calibration of multiple factors plays a significant role. In this way, each mission should fulfill the following characteristics: 1) a mission should be precise, 2) a mission includes a variety of R&D and innovation projects, 3) a mission should include diverse actors and contribute to investments in multiple sectors, and 4) a mission involves collaborative policymaking (Anadon, 2012); (Mazzucato, 2017); (Mazzucato, 2018). The MIS framework integrates all the potential paths that influence a mission's accomplishment, since it involves technological and behavioral transitions for processes, products, and business models. The paths are likely to compete or complement each other, and it is important to comprehend the interlinkages



between them. The paths can be categorized as competing – in capital and human resources–, complementing, or independent – having a neutral effect on each other– (Elzinga et al., 2020, p. 4). The coordination of and among the paths is essential to achieving the mission's goal. This coordination can be enhanced by governments, businesses, NGOs, and industry associations (Elzinga et al., 2020). MIS is a functional framework; therefore, its mission functions (MFs) are as follows: MF1) experimentation by entrepreneurs, MF2) knowledge development, MF3) knowledge dissemination, MF4) directionality, MF5) market creation, MF6) mobilizing resources, MF7) counteracting resistance, and MF8) coordination (Elzinga & Hekkert, 2020). These functions can be observed in Table 2.

Table 2: Description of MIS Framework (Wesseling & Meijerhof, n.d.)

System function	Description
<b>MF1: Experimentation by entrepreneurs</b>	Experiments with innovations to stimulate learning; launching innovative solutions; adopting business models for the dissemination of solutions
<b>MF2: Knowledge development</b>	Learning by searching and by 'doing', which results in the comprehension of new technical and social knowledge for problems
<b>MF3: Knowledge diffusion</b>	Any form of distributed technical and social knowledge for the mission's solutions and societal challenge (stakeholder actions, governance structures, public consultations, mission progress reports).
<b>MF4: Providing directionality</b>	
<b>4A: Problem directionality</b>	The direction given to stakeholders' conceptions of societal challenge and the level of priority they accord it.
<b>4B: Solution directionality</b>	The direction given to the search for technological and social solutions, and actions needed to determine, choose, and exploit collective sets of solutions for the mission.
<b>MF5: Market creation</b>	Developing niche market and upscaling assist for technical and social solutions; diminishing markets and technologies hindering the mission.
<b>MF6: Reallocation of resources</b>	Mobilization of human, financial, and material resources to empower all system functions.
<b>MF7: Creation of legitimacy</b>	Increasing legitimacy for the prioritization of the problem and the diffusion of its solutions.
<b>MF8: Coordination</b>	Coalitions and collaborations among stakeholders so that all solutions are equally promoted and initiated.

The fourth function covers both challenge/problem and solution directionality. This distinction allows the development of a common and united notion of the mission by prioritizing the problems (Kattel & Mazzucato, 2018). Under the umbrella of challenge



directionality, two categories of actors are simultaneously initiated. These categories vary between the actors devoted to a joint mission, whose solution remains uncertain, and those who are investing and developing a promising technology unrelated to any mission. Due to the size of the mission and the potential scale-up, the coordination function ensures all paths are equally promoted, since several solutions address the same problem. The MIS framework includes the solution directionality to avoid the underdevelopment of specific paths as a result of limited or unequal resources and available capital (Elzinga & Hekkert, 2020; Kattel & Mazzucato, 2018). Within MIS, exerting pressure on the current “regime” is of additional importance. The dominant system entails a sequence of established customs and routines, norms and regulations, actors, and infrastructures that reinforce each other to maintain the system's existence. Once pressure is exerted onto the established system, innovations and new technologies are given space to flourish and develop (Elzinga et al., 2020). A mission-oriented policy is dependent on the level of contestation, and the complexity and uncertainty of the problem entailed in the specific social challenge to successfully frame and extract a legitimate mission from it. Hence, the success of an MIS relies on the actors’ perception of the problem (Wanzenböck, Wesseling, Frenken, Hekkert, & Weber, 2019).

The MIS framework was chosen as the framework to analyze the transition to “Circular Plastic Packaging” in a workshop led by Rijkswaterstaat and the Copernicus Institute of Sustainable Development of Utrecht University (Elzinga & Hekkert, 2020). The results of that workshop indicate that despite the mission already accelerating, several problems have appeared along the way that must be resolved for the NL to totally transition to a CE in the flexible plastic packaging sector (Elzinga & Hekkert, 2020). Using the MIS framework, this master’s thesis aims to identify the system’s barriers and drivers, expand knowledge among the system’s actors, and assist in the coordination and direction of the mission to a Dutch circular plastic packaging transition. The system's boundaries are the NL, while the system includes the corresponding actors (waste suppliers, producer responsibility organizations, recyclers, and converters), and their interrelationships in the flexible plastic packaging sector. Both the processes and materials associated with the transition are selected as the new paths for this analysis as depicted in Table 3.

Table 3: The Relevant Paths of the Investigation

<b>PATHS</b>	<b>ACTIVITIES</b>
<b>P<sub>1</sub></b>	Mechanical Recycling (MR)
<b>P<sub>2</sub></b>	Chemical Recycling (CR)
<b>P<sub>3</sub></b>	Bioplastics
<b>P<sub>4</sub></b>	Reusables (R)



### 3. METHODOLOGY

#### 3.1. Research Design

This master’s thesis aims to expand the body of knowledge on the flexible plastic packaging sector’s transition to a CE in the NL by conducting a deductive, qualitative analysis. The choice to follow a deductive approach was based on the application of a new theoretical framework, the MIS, to a unique empirical context, that is, the NL becoming circular in the flexible plastic domain, while the qualitative analysis sought to discover nuances in this new framework and empirical context. The steps of the analysis are depicted in Table 4.

Table 4: Steps of the Qualitative Analysis (Wesseling & Meijerhof, n.d.)

STEPS	ACTIONS
<b>1. Problem Solution Diagnosis</b>	Assessment of the relevant activities required under the NL Plastics Pact and determination of suitable paths.
<b>2. Structural Analysis</b>	Identification of the main structural components categories of the system based on literature assessment
<b>3. Functional Analysis</b>	Historical event analysis by identifying events via Lexis Nexis and other internet archives
<b>4. Identification of barriers and drivers</b>	Assessment of the functionality of the mission, results and discussion

Secondary data were used to address the first two steps of the study. In particular, the NL Plastic Pact defined the main problems within the mission, while the paths were considered suitable solutions. Moreover, an in-depth literature review defined the categories of the main structural components. A historical event analysis (or sequence analysis) provided the primary data used for Steps 3 and 4 of the study. The process approach or sequence analysis is used to conceptualize change processes as sequences of certain events (Poole, Van de Ven, Dooley, & Holmes, 2000; Van de Ven & Poole, 2005). An *event* is defined as “a temporarily specific outcome of performed acts by human actors that the actor itself discerns and perceives as influential” (Elo, Halinen, & Törnroos, 2010, p. 4). Primary data for the historical event analysis were extracted from Lexis Nexis, including newspaper articles and policy and industry reports. *Lexis Nexis* is an academic research engine that aggregates scientific and relevant content, making the research more efficient. It includes features for better organizing the research, thereby establishing itself an easy-to-use academic research tool (Knapp, 2018). Data collected via desk research were used to better understand the underlying reasons for the existence of drivers and barriers to a CE transition within the system.

The scope of the analysis is flexible plastic packaging in the NL. The choice of scope is based on the NL’s commitment to becoming circular by 2050. The focus on flexible plastic packaging results from the urgency of the sector tackling the recyclability issues of these products in the sector, which has led to considerable discourse and actions that provide data and insights for the thesis.



### 3.2. Data Collection

The primary data of the analysis include a historical event analysis on the activities that have taken place in the plastic packaging sector in the past five years, given that the CE concept is relatively contemporary. For this reason, the analysis of the sector is from 2015 to 2021. The collected data underline how change evolves over time and allows for essential insights into the transitional process (Poole et al., 2000). The primary data were sourced from Lexis Nexis and other internet archives and included business and governmental reports, scientific literature, professional journals, and newspaper articles referring to the four paths. Both primary and secondary data are considered qualitative and are aligned with the ethical instructions provided by Utrecht University (Appendix 10.1). The number of collected events was 641, with 228 sources assessed, while the whole data set is presented in Appendix 10.2.

### 3.3. Data Analysis and Operationalization

To identify the most relevant activities determining the system’s functionality, a historical event analysis was conducted. The analysis comprised the following steps: 1) literature research, 2) database classification, 3) allocation to functions, 4) graphical representation, and 5) narrative. These steps are briefly described in Table 6.

Table 5: Steps of Historical Event Analysis (Negro, 2007)

STEPS	EXPLANATION
<b>1. Literature Research</b>	Research of European and Dutch journals, papers, reports and websites regarding the paths
<b>2. Database classification</b>	The database was organized according to the year of event, actors involved, and paths
<b>3. Allocation to functions</b>	Event were allocated to one of the System Functions would emerge
<b>4. Graphical Representation</b>	The events were illustrated in graphs per path, including separate graphs per year and per System Functions
<b>5. Narrative</b>	A story that elaborates on how the sequence of events took place, and more concrete conclusions were made

Significant events were identified and entered into a Microsoft Excel database. Once an article from Lexis Nexis was deemed relevant, entailing one of the keywords in Table 6, the included events were added to the database. The data collected from the sector were coded into the four previously identified paths. However, due to overlapping actors, institutions, and organizations, the same sources and data were used for all four paths (mechanical recycling, chemical recycling, bioplastics, reusables) to avoid conducting four different analyses. A further coding followed, based on the functionality of the system. Each event was allocated to an MF according to several selected indicators and diagnostic questions, as presented in Tables 7a, 7b. These indicators assess the functionality of the events in the mission and whether an event assists in building up the new system or breaking down the old one, the so-called "regime change." Wesseling and Meijerhof 's (n.d.) latest article aims to include this regime change perspective, but that has not been performed consistently for all eight functions. Therefore, the indicators aim to identify the functionality of events in the mission



and their contribution to the mission itself. The events' positive or negative effect on the system's functionality is represented with a +1 or -1 symbol for the graphical representation to follow. A narrative determines "the bigger picture" regarding the causal factors that may influence each path and the mission in general.

Table 6: An overview of all search terms and results used for the document analysis.

Search Term	Time Scope	Results KIDV knowledge base	Results Lexis Nexis	Sources used in the analysis
Circular flexible plastic	2015-2021	583	21768	14
Bioplastic	2015-2021	546	16583	58
Mechanical recycling	2015-2021	591	19739	95
Chemical recycling	2015-2021	537	15822	41
Reusable plastic	2015-2021	511	11231	20

Table 7a: Indicators per function (Hekkert et al., 2020); (Wesseling & Meijerhof, n.d.)

	Building up a New System	Breaking down the Old System
<b>MF1: Entrepreneurial Activities</b>	<ul style="list-style-type: none"> <li>Experiments and pilots with existing and new circular solutions started/stopped.</li> <li>Circular projects start/stop</li> <li>Circular companies start/stop (new entrant or incumbent)</li> </ul>	<ul style="list-style-type: none"> <li>Experiments and pilots with existing and new linear solutions started/stopped.</li> <li>Linear projects stop/start</li> <li>Linear companies stop/continue along same lines (new entrant or incumbent)</li> </ul>
<b>MF2: Knowledge Development</b>	<ul style="list-style-type: none"> <li>(Scientific and professional) Publications on circular activities</li> <li>Circular knowledge projects start/stop.</li> <li>(New) Circular research groups start/stop.</li> <li>(New) Circular research programs start/stop.</li> <li>New patents on circular product or process (+)</li> </ul>	<ul style="list-style-type: none"> <li>(Scientific and professional) Publications to unlearn linear activities/continue linear activities.</li> <li>Linear knowledge projects stop/start.</li> <li>(New) research groups to unlearn old system start/stop, e.g., market studies to unlearn current consumer preferences.</li> <li>Research groups dedicated to old linear system stop/start or continue.</li> <li>(New) research programmes to unlearn old system start/stop.</li> <li>Research programmes dedicated to old linear system stop/start or continue.</li> <li>New patents on linear product or processes (-)</li> </ul>





<b>MF3: Knowledge Diffusion</b>	<ul style="list-style-type: none"> <li>• Symposiums and conferences about circular activities (start/stop)</li> <li>• Knowledge networks about circular activities (start/stop)</li> <li>• More/fewer common publications about circular activities</li> <li>• Knowledge sharing activities, like collaborations, between different actors (companies, consumers, knowledge institutes, governments), e.g. symposia.</li> </ul>	<ul style="list-style-type: none"> <li>• Symposiums and conferences about linear activities (stop/start).</li> <li>• Knowledge networks about breakdown of old system start/about linear activities continue.</li> <li>• Common publications about breakdown of old system/about linear activities continue.</li> <li>• Knowledge sharing activities to phase out linear principles between different actors (companies, consumers, knowledge institutes, governments)</li> </ul>
<b>MF4A: Problem Directionality</b>	<ul style="list-style-type: none"> <li>• Congruence/Agreement on the mission problem, expressed in e.g., media, company strategies.</li> <li>• Agreeance on the (shared) goals of the mission</li> <li>• Agreeance over different governance structures and strategic documents – converging (uncontested, well-defined and informed).</li> <li>• Prioritization of mission problem on agenda of key actors</li> <li>• Expressed positive expectations by key actors.</li> </ul>	<ul style="list-style-type: none"> <li>• Disagreement on mission problem – incumbents discrediting or contesting the mission, trying to delay it.</li> <li>• Expressed concerns by opponents about uncertainty, safety, quality etc. of mission problem.</li> <li>• Discrediting the goal of the mission</li> <li>• Diverging problem perspectives (contested, complex and uncertain)</li> <li>• Irrelevance of/disregard towards mission problem by key actors</li> </ul>
<b>MF4B: Solution Directionality</b>	<ul style="list-style-type: none"> <li>• Express expectations for specific circular solution trajectories (found in road maps, policy visions and front runner strategies)</li> <li>• Positive societal discourse in media about specific circular solution trajectories (e.g. changes in customer behaviour)</li> </ul>	<ul style="list-style-type: none"> <li>• No coherent expectations expressed on solution trajectories.</li> <li>• Indifference towards which trajectory to follow.</li> <li>• Negative societal discourse in media about solutions trajectories.</li> </ul>
<b>MF5: Market Creation</b>	<ul style="list-style-type: none"> <li>• Policy interventions/Absence of policy interventions for market adoption of circular products</li> <li>• Activities/lack of activities (e.g. marketing) creating consumer demand for circular products.</li> <li>• Creation of standards/lack of standard setting for circular products</li> </ul>	<ul style="list-style-type: none"> <li>• Policy interventions/lack of policy interventions to destabilize the current market.</li> <li>• Decline of activities/increase of activities creating consumer demand for linear products.</li> <li>• Decline of new standards or abandoning of old standards/continued support for standards supporting linear products.</li> </ul>



<b>MF6: Reallocation of resources</b>	<ul style="list-style-type: none"> <li>• Increase/decrease allocation of financial resources to support system activities in the circular system.</li> <li>• Increase/decrease allocation of human resources to support system activities in the circular system.</li> <li>• Making infrastructure available/unavailable for the circular system (e.g. production facilities)</li> <li>• Sufficient/insufficient feedstock for circular strategies.</li> </ul>	<ul style="list-style-type: none"> <li>• Decrease/increase allocation of financial resources to support system activities in the linear system.</li> <li>• Decrease/increase allocation of human resources to support system activities in the linear system.</li> <li>• Making infrastructure unavailable/available for the linear system</li> <li>• Sufficient/insufficient feedstock for linear system</li> </ul>
<b>MF7: Creation of legitimacy</b>	<ul style="list-style-type: none"> <li>• Increase/decrease of stakeholders advocating or lobbying for support for the mission and its solutions.</li> </ul>	<ul style="list-style-type: none"> <li>• Decrease/increase of stakeholders advocating or lobbying for the current system.</li> </ul>
<b>MF8: Coordination</b>	<ul style="list-style-type: none"> <li>• Formation/dismissal of coalitions focussed on transition.</li> <li>• Creation and publication/abandoning of roadmaps to structure the transition.</li> <li>• Progress monitoring and evaluation of mission</li> <li>• Multi-stakeholder deliberation aimed to build up new system.</li> <li>• Reflection on efforts to meet mission.</li> <li>• Take measures to catch up with mission, redesign, or reorientation.</li> </ul>	<ul style="list-style-type: none"> <li>• Cancellation/forming of coalitions focussed on linear system.</li> <li>• Abandoning of former/creation and publication of new roadmaps outlining progress as in the linear system.</li> <li>• Progress monitoring and evaluation of breakdown</li> <li>• Multi-stakeholder deliberation aimed to break down old system.</li> </ul>

Table 7b: Diagnostic questions per function (Wesseling & Meierhoff, n.d.)

Mission's Functions	Diagnostic questions
<b>MF1: Experimentation by entrepreneurs</b>	<ul style="list-style-type: none"> <li>• Are experiments to develop existing and new solutions being conducted sufficiently quickly to accomplish the mission per path?</li> </ul>
<b>MF2: Knowledge development</b>	<ul style="list-style-type: none"> <li>• Is knowledge developed to comprehend the societal problem enough?</li> <li>• Is the knowledge to develop existing and new solutions created sufficiently quickly to accomplish the mission per path?</li> <li>• Are actors sufficiently rapidly unlearning practices harmful to the mission per path?</li> </ul>



<b>MF3: Knowledge diffusion</b>	<ul style="list-style-type: none"><li>• Is knowledge of the societal problem sufficiently widespread to formulate a broad-based, clear and ambitious mission per path?</li><li>• Is the knowledge to develop and use solutions disseminated sufficiently quickly among all stakeholders to accomplish the mission by path?</li></ul>
<b>MF4: Providing directionality</b>	<ul style="list-style-type: none"><li>• How do stakeholders prioritize the mission problem and framework relative to other societal problems?</li><li>• Which stakeholders support and pursue path development and dissemination sufficiently and quickly to accomplish the mission? Which paths do they prioritize?</li><li>• Do stakeholders sufficiently recognize and exploit the interconnections between different paths?</li></ul>
<b>MF5: Market creation</b>	<ul style="list-style-type: none"><li>• Do formal or informal policies support the dissemination of routes sufficiently quickly to accomplish the mission?</li><li>• Are harmful technologies and practices being eliminated sufficiently quickly by formal or informal means to accomplish the mission? Are the pathways being adopted sufficiently quickly by stakeholders?</li><li>• If harmful practices and technologies are abandoned sufficiently quickly by those involved?</li></ul>
<b>MF6: Resource mobilization</b>	<ul style="list-style-type: none"><li>• Is sufficient human, financial and material resources mobilized to fulfil the other system functions?</li></ul>
<b>MF7: Creation of legitimacy</b>	<ul style="list-style-type: none"><li>• Do all stakeholders endorse the mission's problem?</li><li>• Do stakeholders advocate or lobby to prioritize the mission issue over other societal problems and desires?</li><li>• Do stakeholders advocate or lobby for more solution support and phase out of harmful practices and technologies?</li><li>• Which paths receive the strongest lobby support or opposition?</li></ul>
<b>MF8: Coordination</b>	<ul style="list-style-type: none"><li>• Are there any coalitions formed?</li><li>• Is there a shared vision with respect to the mission?</li></ul>



#### 4. BACKGROUND CHAPTER

In the following chapter, all the corresponding terminology for the transition to a CE will be defined (Table 8). The definitions were mainly extracted from both The Plastic Pact NL 2019-2025, and Ellen MacArthur Foundation (2016). For some technical terms, other resources were used as well.

Table 8: Table of definitions (BuildingGreen, 2021; Ellen MacArthur Foundation, 2016; Engage the Chain, 2021; NL Plastic Pact, 2019)

TERMS	DEFINITIONS
<b>Bioplastics:</b>	<ul style="list-style-type: none"> <li>❖ <i>Bio-based</i>-A material that is totally or partly made from biomass.</li> <li>❖ <i>Biodegradable</i>- A material that is able, with the assistance of micro-organisms, to decompose into natural components.</li> </ul>
<b>Chemical Recycling:</b>	A process to depolymerize polymers into separate monomers that then can be used as the base for producing polymers from scratch.
<b>Mechanical Recycling:</b>	The recovery of after-use plastics through mechanical processes, without significantly altering the chemical properties of the plastic.
<b>Polyethylene</b>	Polymer resulting by the polymerization of monomer of ethylene. It has good mechanical, thermal, chemical, electrical and optical properties. It is commonly used for both flexible and hard plastic products.
<b>Polypropylene</b>	Polymer resulting by the polymerization of monomer of propylene. It has good mechanical, thermal, chemical, electrical and optical properties. It is commonly used for both flexible and hard plastic products.
<b>Recyclate:</b>	Waste material that is used for recycling in manufacturing; secondary material.
<b>Recycled Content:</b>	The proportion of materials used in a product that come from the solid waste stream. When these materials come from the manufacturing process, they are referred to as pre-consumer recycled content, while when they come after consumer use, they are referred to as post-consumer recycled content
<b>Reusable products:</b>	A packaging which has been conceived, designed, and commercialized to achieve multiple rotations within its lifecycle by being refilled or reused for the same purpose it was originally designed for.



In the NL, the municipalities are responsible for both waste collection and recycling, handling the matters through taxation. Dutch recyclable waste is recycled chiefly internally or in European countries close by. The non-recyclable waste is sent to incineration for energy production (Lapper, 2021). The remainder of the waste ends up in landfills. The method of recycling depends on the municipality; hence, different requirements may exist in different localities. There are two main methods that municipalities use for the household waste: some municipalities provide separate recycling bins that allow citizens to separate their waste at home, while enabling the disposal of recyclable products in communal, roadside containers (Lapper, 2021). For plastics, plastic waste can be disposed of in on-street containers (i.e., Amsterdam). Citizens should ensure that the disposed plastic is clean of food waste. However, some plastic products, such as cling film, sticky plastic tape, and bottles that contained chemicals, cannot be recycled.

After collection, the residential waste, including flexible plastic packaging, is transferred to sorting facilities. There, from the mixed stream, plastics are separated using three central separation systems: the so-called mechanical separation (post-separation), curbside, and drop-off systems. The first system is considered the most cost-efficient because it uses infrared and film-grabber techniques to separate the plastic packaging waste (Gradus, 2020). Notably, 11% of the Dutch municipalities use only post-separation systems; 30% separate the waste through curbside techniques, while 20% operate drop-off locations (Gradus, 2020). Plastics are sorted according to many properties depending on the recycling facility or the desired final product (KIDV, 2020a). When plastic waste consists of different materials, a sorting process is used to distinguish what fraction of materials can be recycled. Those filtered materials are characterized as mix-fractions when they consist of multiple plastic materials or mono-fractions when the materials are more homogeneous (KIDV, 2020a). Mono-fractions are the ones that can be used for upcycling, such as the production of film and valuable sorted products, while mix-fractions can be used for downcycling (KIDV, 2020a). Most Dutch flexible plastics (approx. 68%) are incinerated for energy, while the rest is collected for mechanical recycling (van Velzen, de Weert, & Molenveld, 2020). From the total amount of flexible plastic packaging collected for mechanical recycling, approximately 60% ends up in the sorted product mix, 25% in film, 10% in various sorting residues, and 5% in valuable sorted products (van Velzen et al., 2020). The packaging industry remunerates costs for collecting, separating, sorting, and recycling plastic packaging waste. Afvalfonds is responsible for this reimbursement (Gradus, 2020).

The current Dutch recycling system can only optimally process flexible plastic packaging consisting of one material (mono-material packaging), that is, polyethylene (PE; 90% in kg) of a specific size and color (KIDV, 2021a). The flexible plastic packaging should not contain PVC or PVdc, elastomers, or non-plastic agents (i.e., paper). When it does, the recycling process is hindered. Material other than PE, such as polypropylene (PP), or polyethylene terephthalate (PET), does not end up in the mono-fraction but rather in the mix-fraction. Flexible PE packaging larger than A4 size is recycled as a mono-fraction in the so-called DKR-310 fraction, resulting in a new flexible material (KIDV, 2021a). When the packaging is larger than 40x40 mm but still smaller than A4 size, it ends up in the mixed plastic recyclable fraction called DKR-350. Almost all other flexible plastics also end up in the DKR-350 flow, which can only be used for downcycling such as the development of benches and signposts (KIDV, 2021a). With regard to the color of the flexible plastic packaging, dark or very bright colors hinder the recycling process and the quality of the output. Moreover, according to KIDV's (2021a), Recycle Check Flexible Plastic Packaging, labels should be made from the same material as the packaging; otherwise, it is difficult to separate the label from the primary packaging, regardless of the



label's potentially washable character. If a label is made from a different material than the main component, it should cover no more than 30% of the surface to which it is being attached. This ensures that the near infrared sorting machine will identify the material of the main component correctly (KIDV, 2021a).

The same recycling infrastructure for virgin plastic products can be applied, causing no contamination of the recyclate, on bioplastics produced from biomass instead of fossil fuels but which also contain the same chemical structures as commonly used plastics such as plastics bio-PE and bio-PET (Molenveld, Koenhen, Thoden van Velzen, & Brouwer, 2014). In contrast, for biodegradable plastics that need specific conditions to decompose, an industrial composting facility is necessary. Despite the existence of some corresponding facilities, if biodegradable plastics are not adequately disposed of, they create problems in the recycling stream.



## 5. RESULTS

### 5.1. Problem-Solution Diagnosis

In 2019, in collaboration with France and Denmark, the Dutch government launched the European Plastic Pact to initiate the plastic packaging value chain transitioning to a CE. The pact includes agreements among plastic producers, large companies, governments, and recyclers and contains four main objectives desired by 2025: 1) make plastic packaging fully recyclable and suitable for reuse where possible; 2) reduce unnecessary plastic use and plastic made from petroleum by at least 20%; 3) improve the current collection, sorting, and recycling capacity by at least 25%; and 4) use at least 30% recycled plastic in new packaging and products. The EU Commission has welcomed the initiative and is involved as an observer. To date, 66 companies and organizations and 15 governments have signed the pact. Meanwhile, the Dutch government has also committed to achieving total circularity by 2050 (NL Plastic Pact, 2019). However, the Circularity Gap Report (Circle Economy, 2020) uncovered that only 8.6% of the global economy is operating circularly, while the NL is achieving 24.5% at present.

After assessing the NL Plastic Pact, this solution analysis distinguished five pathways as the primary solutions/pathways of the mission. These pathways refer to both process solutions and material solutions, and they are derived from both the core objectives and the various goals and targets suggested in the Plastic Pact. The main pathways for transitioning to a CE for flexible plastics therefore consist of the following: the two process solutions are mechanical recycling (MR) and chemical recycling (CR), while the material solutions are bioplastics, and reusable (R). The two recycling processes were distinguished, but the analysis did not include energy recovery or reprocessing into materials intended for use such as packaging filling material as CR (NL Plastic Pact, 2019). All four paths are individually identified in the NL Plastic Pact, and distinguished by separate objectives and actions, reinforcing the statement that they need to be assessed separately. Finally, all the identified pathways were considered to be incremental, pre-existing solutions to the mission, while innovation taking place within the pathways aims at their optimization rather than the development of new paths.

### 5.2. Structural Analysis

#### 5.2.1. The Value Chain of Flexible Plastic Packaging

Households and industrial sources can both generate flexible plastic packaging waste. A percentage of that waste ends up in municipal solid waste and is incinerated or placed in landfills. The rest is collected separately and transferred to sorting facilities, where it is sorted into multiple plastic resins. These resins are then transferred to the recycling infrastructure and recycled into new flexible plastic packaging, which can then be launched on the market by retailers and product manufacturers. Figure x depicts the value chain of flexible plastic packaging. The system actors can be summarized as waste suppliers, producer responsibility organizations, recyclers, and converters (New inno Net, 2015).

The flexible plastic packaging value chain consists of two different systems operating simultaneously. The first system refers to the actual life cycle of the flexible plastic packaging, from manufacturing to end-of-life. In this system, flexible plastic packaging waste is generated. Plastic producers, retailers/brands, and consumers constitute the actor groups in this system. The second parallel system commences once the flexible plastic packaging is disposed of. Flexible plastic packaging is collected, separated, sorted, and then recycled. The



recycling process involves the special treatment of plastics through sorting, cleaning, grinding, and melting. Plastic waste that cannot be treated is either sent to landfills or exported to foreign countries. The system of recycling flexible plastic packaging waste includes recyclers and converters. Both systems play an equal role in achieving circularity in the flexible plastic packaging domain since they reinforce and affect one another. The administrative bodies coordinate the two systems and try to initiate the value chain holistically transitioning to a CE through roadmaps and guidance, regulatory agreements, directives, and bans.

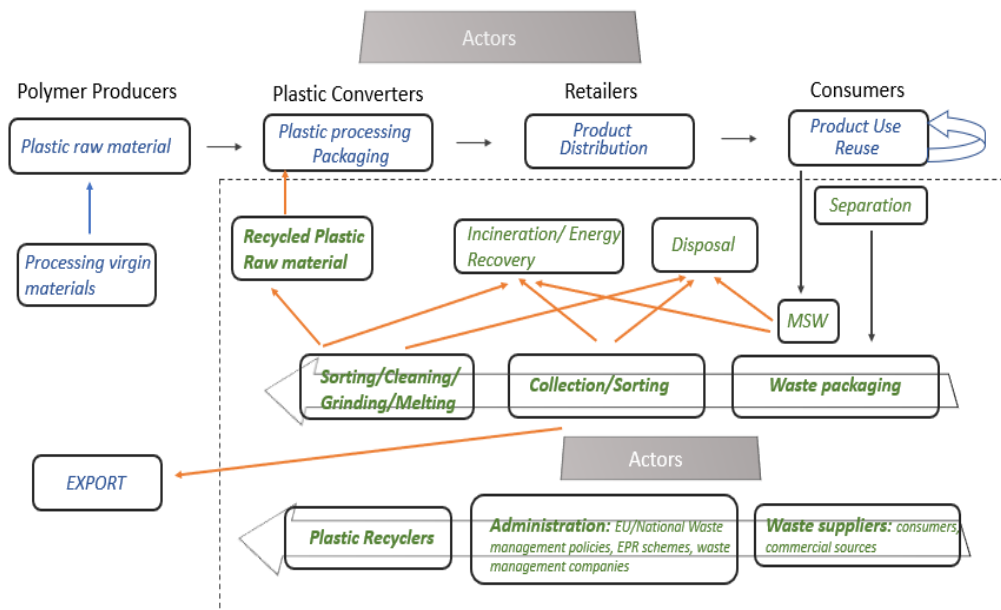


Figure 2: Flexible Plastic Packaging Value Chain.  
Source: New inno Net, 2015

### 5.2.2. Actors

In the following section, the structural analysis of the system is presented. The four actor categories are assessed according to the literature, while their significance in the mission is also illustrated briefly.

#### 5.2.2.1. Waste Suppliers

Waste suppliers include both plastic producers and retailers/brands. Plastic producers play a dual role in the system. First, they supply the system with flexible plastic packaging, which will eventually become waste. Secondly, in some cases, plastic producers buy the recycle to develop new products. The commitments and actions of the most visible plastic producer actors are also summarized in Table 7. Plastic retailers/brands also participate strongly in the plastic waste supply. Retailers supply the system either with the secondary plastic waste produced during the distribution phase or with the primary flexible plastic packaging they put on the shelf. Table 8 summarizes the commitments and actions of essential retailers/brands regarding the transition to circular flexible plastic packaging. Consumers or households are also key actors in this category. Households have multiple possibilities for disposing of their flexible plastic packaging waste, which depends on the local collection system. Alternative





waste suppliers include other sources of plastic waste, such as festivals and construction companies because they constitute closed systems. Actions taken by the waste supplier actors' category affect the *building of a new system* and the *breaking of the old system*, with commitments and R&D strategies taking place, and in some cases, actual products placed on the market. Waste suppliers include both incumbent companies that are well established in the market, new entrants, and start-ups.

#### 5.2.2.2. Producer Responsibility Organizations

Producer Responsibility Organizations (PRO) include administrative bodies, knowledge institutions, and universities, which navigate and lead the CE transition through legislation, roadmaps, and reports. For flexible plastic packaging, the EU Commission and the Dutch government are leading the transition to a CE. Table 9 represents the most significant actions and commitments that the two parties have implemented for the transition to a CE with regard to plastic packaging. Administrative bodies play an essential role in coordinating the mission by financing and supporting certain coalitions and publishing roadmaps to structure the transition, such as the NL Plastic Pact.

The PRO category also includes knowledge institutions. These institutions contribute to the transition by providing significant practical knowledge and know-how concerning the topic. The prevailing knowledge institutions in the Dutch transition to a CE in the flexible plastic packaging industry are the Knowledge Institute for Sustainable Packaging (KIDV) and the Circular Economy for Flexible Packaging Organization (CEFLEX). KIDV advises flexible plastic packaging companies on developing sustainable products by providing factual knowledge, practical tools, and applied scientific research for the packaging chain. KIDV has already published several documents aimed at accelerating the transition (Table 9). CEFLEX collaborates with over 160 European companies, associations, and organizations that represent the entire value chain of flexible packaging. CEFLEX's guidelines have resulted from a significant collaboration with the entire value chain, and they are followed by most of the EU, including the NL. The Ellen MacArthur Foundation is also considered a key actor in this category because it constantly initiates and coordinates the mission by publishing relevant reports, such as the "New Circular Economy for Plastics," and organizing initiative events. Moreover, Dutch universities are actively participating in the acceleration of the transition. Eindhoven University, Wageningen University, the University of Maastricht, and Utrecht University have associated themselves with several projects and research to establish and diffuse knowledge in the sector.



Table 9: Plastic producers' commitments and actions (Amcor, 2020; Berry Global, n.d.; Futamura Group, n.d.; Graham Packaging Company, n.d.; Henkel AG & Co. KGaA, n.d.; Mondelez International, 2019; Mondy, 2019).

Plastic Producers	COMMITMENTS
<b>Amcor</b>	<ul style="list-style-type: none"> <li>• <i>Currently through research and development we have made progress toward designing our products for recyclability, offering recyclable solutions to previously problematic or unnecessary plastic packaging.</i></li> <li>• <i>Accelerating our project to replace nylon barriers, working with key customers to improve medium and high barrier packaging, advocating for increased recycling infrastructure and streams, and developing and commercializing other alternative solutions to problematic and unnecessary packaging.</i></li> </ul>
<b>Berry Global</b>	<ul style="list-style-type: none"> <li>• <i>Efforts to lightweight products, thereby reducing unnecessary plastic. we believe we have avoided the use of nearly 700 million pounds of plastic over the last decade from our continual efforts to improve product efficiency.</i></li> </ul> <p><i>We are also continuing our efforts to design for recycling. This includes converting PS packaging to PP as well as eliminating problematic design features, such as carbon black.</i></p>
<b>Futamura Group</b>	<ul style="list-style-type: none"> <li>• <i>We do plan to eliminate PVdC coated Cellophane films. However, we do employ a small amount of PVdC in 1 NatureFlex film family only for barrier purposes. This does not compromise ecotoxicity or compostability so we plan to maintain until a suitable alternative is developed.</i></li> <li>• <i>Similarly, we do employ metalisation in certain grades. Again, the level used does not negatively impact ecotoxicity or compostability.</i></li> </ul>
<b>Graham Packaging Company</b>	<ul style="list-style-type: none"> <li>• <i>Collaborate with our customers to provide alternative to carbon black technology.</i></li> <li>• <i>Collaborate with Association of Plastic Recyclers (APR) to qualify nylon barrier testing methodology to improve barrier components towards recyclability.</i></li> </ul>
<b>Henkel AG &amp; Co. KGaA</b>	<ul style="list-style-type: none"> <li>• <i>Henkel plans to eliminate or substitute any non-recyclable packaging currently in use. Multi component packaging or multi material packaging are currently being evaluated and unneeded design elements will be removed where possible.</i></li> <li>• <i>Other materials in scope as PETG are evaluated with each new relaunch.</i></li> <li>• <i>One example: Beginning of 2020, Henkel has already started to convert the black bottle of Perwoll's "Renew &amp; Repair" variant to a new packaging material which uses an alternative carbon-free color, through which bottles become recyclable and thus can be integrated back into the value chain.</i></li> </ul>
<b>Mondelez International</b>	<ul style="list-style-type: none"> <li>• <i>100% of our packaging using non-detectable carbon black by 2021. Black plastics are used primarily in our gifting portfolio.</i></li> <li>• <i>Over 90% of our packaging using PS by 2022. We are in the process of eliminating PS from our portfolio of thermoformed trays for Oreo®, Chips Ahoy!®, and other biscuit brands in the US, Canada, and Mexico.</i></li> <li>• <i>100% of our packaging using PVC, PVdC, and PS by 2025. PVC is used in our blister packs for gum products as well as in shrink sleeve labels for our gum bottles. We are exploring solutions for both.</i></li> <li>• <i>Our use of PVdC is minimal and focused on a few flexible packaging applications. We are exploring alternative solutions.</i></li> </ul>
<b>Mondi</b>	<ul style="list-style-type: none"> <li>• <i>Our major focus in the future will remain on replacing non-sustainable products with more sustainable solutions.</i></li> <li>• <i>Eliminating problematic or unnecessary plastic materials and to use paper where possible and plastic when useful. Our research focuses on enhancing the functionalities of paper to make it more broadly applicable in different end uses.</i></li> <li>• <i>Through our coating expertise, we will be able to provide paper with barrier properties while remaining recyclable in established recycling streams</i></li> <li>• <i>The result of our developments will reduce the use of unnecessary plastic products, metal laminated and mixed material flexible films, increasing the opportunity for our products in general to have increased value as waste once consumed.</i></li> </ul>



Table 10: Retailers/brands commitments and actions (Ahold Delhaize; n.d.; Danone S.A, 2019; Ferrero Corporate, n.d.; Mars Inc, n.d.; Nestle, n.d.; PepsiCo, n.d.; Starbucks, 2020; Unilever, 2021)

Retailers/ Brands	COMMITMENTS
<b>Ahold Delhaize</b>	<ul style="list-style-type: none"> <li>• Not-for-Resale sourcing team to reduce the size and thickness of the bags used at its bakery sections that will lead to a reduction of 195 tonnes of plastic/ year.</li> <li>• Replace the plastic cutlery in the ready-meal / take-away area with sustainable alternatives (bamboo or birch)</li> <li>• Single use plastic items and zero single use plastic bags in stores</li> </ul>
<b>Danone S.A</b>	<ul style="list-style-type: none"> <li>• Phase out all PVC packaging by 2021, since it interferes with the recycling process for PET.</li> <li>• Phase out PS packaging worldwide by 2025 with Europe by 2024.</li> <li>• 4 million spoons out of 30 will be moved to wooden spoons in 2020</li> <li>• 300 million straws will be removed in 2020, and starting 2021, plastic straws will be replaced by paper in the EU and the US.</li> </ul>
<b>Ferrero</b>	<ul style="list-style-type: none"> <li>• Recyclable packaging development: ongoing plan to remove unnecessary plastics and to replace non-recyclable plastics with more sustainable options by 2025.</li> <li>• Partner with research consortiums to be active on innovative projects that tackle hard-to-recycle plastics, for example by means of chemical recycling.</li> <li>• Reusable systems: we are exploring new business models through our iconic brands, assessing all aspects of product hygiene, safety and environmental sustainability.</li> <li>• Small parts: we are working in collaboration with recyclers to make sure that our “small parts” are effectively collected, sorted, and reprocessed.</li> </ul>
<b>FrieslandCampina Nederland B.V.</b>	<ul style="list-style-type: none"> <li>• 2019, 2020 and 2021: elimination of plastic straws, among others in Europe, Indonesia, Vietnam, Hongkong and Malaysia.</li> <li>• 2020: PVC is banned by our quality standard FoQus and is almost eliminated from our packaging portfolio. In 2020 we will remove the last PVC from our packaging in Romania.</li> <li>• 2020, 2021: Redesigning of the functional - for recycling challenging - carbon black sleeves on bottles so the bottles can be recycled. In that transition, we take along light barrier HDPE bottles replacing them to transparent PET bottles.</li> </ul>
<b>Mars, Incorporated</b>	<ul style="list-style-type: none"> <li>• Full mapping exercise of our entire portfolio to identify opportunities to eliminate problematic or unnecessary packaging.</li> <li>• Eliminate PVC and PVCd and plastic straws from our portfolio by the end of 2020.</li> <li>• Redesign several pouch formats for recyclability, moving pouches in our Mars Wrigley and Mars Food business to mono material pouches. In Mars Petcare, a pouch that eliminates the aluminium layer. In the Fall of 2020, a mono material M&amp;M’s packaging in France, new pouch formats for our Food and Petcare pouches will follow.</li> </ul>
<b>Nestle</b>	<ul style="list-style-type: none"> <li>• Removal of all plastic straws by end of 2020 by developing paper-based alternatives and ‘straw-less’ design.</li> <li>• Changing to mono-material laminates, more specifically by developing new material structure to fit product needs and investing in form fill and seal packaging lines by 2024.</li> <li>• Moving to paper for low-barrier applications</li> <li>• Machine adaptation to enable thermoforming solutions i.e. moving from PS to PET or PP.</li> <li>• Change rigid dark-coloured plastic into light and transparent solutions by 2021.</li> </ul>
<b>PepsiCo</b>	<ul style="list-style-type: none"> <li>• Move from PVC shrink sleeves to recycle compatible shrink sleeve materials.</li> <li>• Transition colored PET to transparent green for Mt Dew.</li> <li>• Exploring the conversion of PETG labels to recycle compatible labels.</li> <li>• Transition metallized labels to metallic inks. Additionally, SodaStream will switch all its flavors from plastic to metal bottles by 2025, which should avoid nearly 200 million single-use plastic bottles over the next five years.</li> </ul>
<b>Starbucks Coffee Company</b>	<ul style="list-style-type: none"> <li>• Starbucks has a plastic reduction project underway to lightweight its cold cup and a second phase of the project to incorporate recycled content into the new cold cup</li> <li>• Starbucks is continuing R&amp;D efforts to find alternative materials for difficult-to-recover plastics in items such as our plastic stoppers and the plastic liner of our hot coffee cup.</li> <li>• In January 2020, Starbucks announced they will prioritize the shift from single use to reusable packaging.</li> </ul>
<b>Unilever</b>	<ul style="list-style-type: none"> <li>• Our ambition is to change the way we do business, shifting from single to multiple-use packs by investing in new business models.</li> <li>• We are also investing in material innovations such biodegradable or alternative materials.</li> <li>• Finally, we aim to make materials recyclable by working in collaboration with the industry (e.g. CEFLEX) and creating valuable end-market opportunities for recycling by 2025, including working with governments to develop infrastructure for collection and processing. For instance, we aim to make pumps/trigger sprays recyclable structures by 2025.</li> </ul>



Table 11: Producer Responsibility Organizations Commitments and Actions

Source: Based on literature review

PROs	COMMITMENTS/ ACTIONS
<b>EU Commission</b>	<ul style="list-style-type: none"> <li>• Commission adopts EU plastics strategy.</li> <li>• Commission publishes EU Green Deal</li> <li>• Commission proposal for a Directive on single-use plastics</li> <li>• Directive on single-use plastics enters into force.</li> <li>• New CE action plan, including revised legislative proposals on waste.</li> <li>• Implementation of the European recycling targets</li> </ul>
<b>Dutch Government</b>	<ul style="list-style-type: none"> <li>• National raw materials agreement</li> <li>• NL Plastic Pact</li> <li>• A CE in the Netherlands by 2050</li> <li>• Ban on microplastics used in everyday household products.</li> <li>• Future ban on several single-use plastic products</li> <li>• Dutch municipalities introduced unit-based pricing (UBP) of unsorted compostable waste</li> </ul>
<b>KIDV</b>	<ul style="list-style-type: none"> <li>• Fact sheet: Biodegradable plastic packaging</li> <li>• Report on Chemical recycling of plastic packaging: analysis and possibilities upscaling</li> <li>• Fact sheet: Chemical recycling of plastic (packaging) in European legislation</li> <li>• Research into recyclable alternatives to laminates</li> <li>• The State of Sustainable Packaging</li> <li>• Recyclecheck Packaging</li> <li>• Roadmap 'Multilayer flexible packaging in a circular economy</li> </ul>
<b>CEFLEX</b>	<ul style="list-style-type: none"> <li>• Guidelines: A CE for flexible plastic packaging</li> </ul>
<b>Eindhoven University</b>	<ul style="list-style-type: none"> <li>• Spin-off technology for chemical recycling, in industrial scale testing phase</li> </ul>
<b>Wageningen University</b>	<ul style="list-style-type: none"> <li>• Project: Standardization quality of recycled plastics to enhance circular applicator</li> <li>• Center for Research in Sustainable Packaging (CRISP)</li> </ul>
<b>Utrecht University</b>	<ul style="list-style-type: none"> <li>• Workshop "Circular Plastic Packaging"</li> <li>• Center for Research in Sustainable Packaging (CRISP)</li> </ul>

### 5.2.2.3. Recyclers and Converters

Flexible plastic packaging waste that is intended for recycling is delivered to either a material recovery facility once it is collected to sort into single resin streams or to constitute unit transport and handling loads (often a complete, single container) and increase product value. The sorted plastic is most often baled and transferred to reprocessors. The plastics are chopped into flakes, extraneous components such as labels, metals, and dust are removed, and the flakes are washed (New inno Net, 2015). These flakes can be further extruded into granules by the reprocessor or they can be sold to develop new articles depending on their requirements. In CR, operators chemically degrade the plastic waste into its monomers. The output can be used for polymerization and the development of new plastics.

Plastic converters develop semi-finished and finished plastic products. The input converters need both virgin plastics from plastic producers and recycled plastics from recyclers. Converters supply their raw materials either in granular or powder form and utilize techniques that involve high heat and pressure to manufacture their final products (New inno Net, 2015).



#### 5.2.2.4. Third Parties

Third parties also participate in the mission to achieve a CE in the flexible plastic packaging domain. Such parties include technology providers, certification schemes, and banks. These parties play a significant role in accelerating the transition in multiple ways. On a first level, technology providers optimize the existing techniques and accelerate the supply of these recycled products. On a second level, certification schemes enhance the creation of legitimacy in the mission by ensuring the circular properties of related materials and products, while banks contribute to the (re)allocation of financial resources within the mission. One of the most relevant certification schemes is cyclos-HTP, which certifies products and processes, while banks associated with the mission are ING, ABN-AMRO, and Rabobank. In terms of technology providers, an essential player at present appears to be TOMRA, which develops sensor-based solutions for efficient resource productivity and has supplied multiple Dutch recycling facilities.

### 5.3. Historical Event Analysis of the Paths Between 2015-2021

In the following section, the historical event analysis and functional analysis per path (MR, CR, Bioplastics, and Reusables) between 2015–2021 are presented.

#### 5.3.1. Mechanical Recycling

##### Historical Event Analysis (2015–2021)

Since the 1st of January 2015, the Dutch municipalities have been held accountable for the collecting, treating, and marketing recycled plastic. Moreover, the PMD system was introduced, which combined the collection of plastic packaging, metal packaging, and drink cartons within the Dutch recycling system (Dutch Waste Management Association, 2019). The Amsterdam Economic Board initiated a CE program in partnership with the Amsterdam Metropolitan Area governments, businesses, knowledge institutes, and civilians. One of the core objectives was to achieve the high-value recycling of at least 40 priority resource streams while aiming for an average recycling rate of 90% (Amsterdam Economic Board, n.d.). In response, entrepreneurs began experimenting with technologies to optimize the recycling process, while close attention was paid to the collection systems as a critical point for the acceleration. For instance, collection systems globally aimed at reprocessing used plastics and use them as raw materials, bringing change in the situation (Cooper, 2017). These actions stimulated numerous research programs that aimed to develop knowledge of the topic. In particular, the Learning Center Plastic Packaging Waste (LCKVA) had researched the influence of various collection systems on the composition of the collected plastic/PMD packaging waste (KIDV, 2018a).

In 2017, the second phase of the project took place, which aimed to find the most important variables explaining the differences in the composition of collected plastic/PDM packaging waste between municipalities in the Netherlands (KIDV, 2018a). Several new initiatives that entailed the present or future enforcement of relevant regulations were established, which guided the organization of shared goals within the mission. In particular, the European Parliament voted for legislation for a recycling rate target of 70% by 2030, while for packaging



materials, it suggested an 80% target for 2030. MEPs also supported waste package plans for the EU to limit landfilling to 5% (Industrial Goods Monitor Worldwide, 2017). The same year, the report "A Circular Economy in the Netherlands by 2050" was published, signaling a shared vision for the whole value chain and the recyclability of plastic packaging. However, actors in the sector maintained that there was still considerable work to achieve all the set goals. As reported by Jan Bauer, commercial director of RIGK GmbH and the EPRO, *"...the significant potential for recycling such plastics often remains untapped"* (Cooper, 2017). Several actors began forming a coalition to support the acceleration of the path, including waste suppliers. At the same time, PROs took significant measures to catch up with MR Examples included Rijkswaterstaat helping festivals reduce plastic waste (Rijkswaterstaat, 2016), while several municipalities introduced unit-based pricing of unsorted waste to encourage both the separate collection of recyclable plastics and a decline in the total amount of waste (Dijkgraaf & Gradus, 2017). As a result, more actions commenced that allowed the demand for a CE to be further accelerated. As stated in relevant newspapers, The Netherlands was progressing to ban microplastics used in everyday household products by the end of 2016 (Lane, 2016), while the significance of particular actors and the way they should perform to enable the market's saturation was highlighted. According to Michal van Straalen of MKB-Nederland, small innovative companies can play an essential role through innovations in diminishing existing habits and processes (States News Service, 2017). Further, it is stated that increasing the efficiency of these systems includes forceful cooperation between all actors with the involvement of governmental and non-governmental organizations as well (Cooper, 2017).

That year, the establishment of CEFLEX enabled further coordination of the sector. Nonetheless, waste suppliers began testing the recyclable properties of their products to place them on the market; for instance, EPBP Approved Synvina's PEF Plastic Packaging Material as Recyclable in the existing infrastructures (Plus Company Updates, 2017). The increasing use of recycled content by many plastic producers and retailers, in alliance with PROs such as favorable initiatives by governments, enhanced the stabilization of the path in the market and created opportunities for further expansion and market growth (3BL Blogs, 2017). Although relevant studies had revealed negative results in the MR process, a significant share of recycling waste was downcycled (Dijkgraaf & Gradus, 2017), while only 50% of plastic packaging waste got recycled; the remainder was incinerated (Dijkgraaf & Gradus, 2017). Despite the initiation of the shared vision, retailers/brands continued to lag with the goals/targets set, while recycled content remained low. As Louisa Casson, oceans campaigner at Greenpeace, stated: "companies use an average of just 6.6% recycled plastic in their packaging" (Cooper, 2017).

In 2018, more vigorous participation by plastic producers was witnessed, with many incumbent companies experimenting with optimizing the recycling techniques. For instance, Ioniqa developed a technology to convert PET waste into transparent virgin grade material (Industrial Goods Monitor Worldwide, 2018a). Moreover, Mondi developed fully recyclable plastic laminate for pre-made pouches (MarketLine Newswire, 2018), while DSM developed a polyethylene (PE)/polyamide six barrier film for use in food packaging that could be recycled (McGeough, 2018). Other projects targeted the expansion of MR to include other valuable



materials such as PP. For example, the LIFE PEPPCYCLE project established two lines for sorting and recycling high-density PE and PP from mixed waste streams (Thai News Service, 2018). Additionally, research was conducted to gather more information about the further implementation of recycled content into plastic packaging, especially by universities such as the Wageningen University and its project: Standardization quality of recycled plastics to enhance circular applications (Alvarado Chacon, Brouwer, Thoden van Velzen, & Smeding, 2020). Furthermore, studies determined important results for the development of the transition. In particular, the report from the Commission on the impact of the use of oxo-degradable plastic revealed the negative effects of oxo-degradable plastic on the environment (Impact News Service, 2018). On the one hand, previous research had begun producing results. The LCKVA and Wageningen University revealed that the PMD system has little effect on the purity of the collected material (KIDV, 2018a). On the other, the outcomes also revealed inconsistencies in the way plastic packaging was recycled among municipalities (KIDV, 2018a).

The European Commission published its first Europe-wide strategy for plastics, which called for all plastic packaging to be recyclable by 2030 while providing further guidance for making the transition to achieve the shared goals (ICIS Chemical News, 2018a). Several actors, especially incumbent waste suppliers and retailers, began participating in the shared vision by committing themselves to the mission in alliance with the EU strategy. For instance, LyondellBasell supported the vision of the EU plastics strategy to achieve 100% reuse, recycling, or recovery of all plastics packaging in the EU by 2030 (ICIS Chemical News, 2018b), while Nestlé announced its motive to switch to 100% reusable, recyclable, or compostable packaging by 2025 (Marcus Gover, 2018). The industry also supported the system's orientation by actively providing feedback about the goals/targets of the mission so that further congruence could occur. Examples included the EUROOPEN and other European and national associations that declared collective recommendations on the Commission's proposal for the Directive on reducing the environmental impact of certain plastic products (EU Reporter Correspondent, 2018a).

Differing expectations for MR were rising with recycling targets to be achieved, actors performing well, and the level of positive discourse increasing. Specifically, in 2016 all the EU countries exceeded the EU minimum targets of 22.5% recycling (Industrial Goods Monitor Worldwide, 2018b), while the Council of Ministers agreed that by 2025, at least 55% of municipal waste should be recycled, with a rise to 60% by 2030 and 65% by 2035 (EU Reporter Correspondent, 2018b). Simultaneously, actors in the value chain were financing the transition in several ways. For example, by 2015, banks were more interested in a circular solution and a CE and began increasing the allocation of financial resources in the system (Global Recycling, 2018). Significant coordination within this path was noticed once the EU Packaging and Packaging Waste Directive emerged, which enforced individual targets per country (Industrial Goods Monitor Worldwide, 2018b). However, there were also cases where new plants were underperforming. For instance, DSM warned potential buyers that there is continuing and significant underperformance at the Dutch plant (McGeough, 2018). Negative discourse that involved the totality of the value chain revealed that considerable work had to be done for the path to be properly accelerated. A study by the Ellen MacArthur Foundation



revealed that the recycling targets were very optimistic, and only some country members would successfully achieve those targets (Impact News Service, 2018). Other articles indicated that only 14% of plastic packaging was recycled (Lauzon, 2018), while the EA had passed accusations that firms were using the Netherlands to effectively launder plastic waste before illegally ship it to other countries in the East (Martijn Reintjes, 2018).

By 2019, MR appeared to be already well established, with the existing plants performing efficiently (Simon, 2019) and companies investing in new plants and recycling facilities, such as the AO Group, a domestic appliance and consumer electronics supplier (Financial Wire, 2019). The knowledge that had been gained allowed the actors to understand what the mission was missing. The European Union started encouraging the recyclers to develop improved quality standards for recycled products, the obligatory requirement to recycle all the packaging plastics, and a reduced VAT on recycled products (PR Newswire Europe, 2019a). Other actors such as PROs began paying closer attention to developing specific rules for sustainable manufacturing that would be enforced in later years. At the same time, several new stakeholders were included in a meeting held in Brussels to support the development of such requirements (Keating, 2019). Further guidance was provided to the mission by the publication of the EU Green Deal and the NL Plastic Pact. In addition, the sector communicated a stronger commitment to recycling by banning oxo-degradable plastic packaging by 2021 (European Commission, 2019). The industry is also committed to eliminating the leakage of plastic pollution into the environment (Ravenscroft, Thomas, & Westervelt, 2019).

To provide directionality and guidance for recyclable plastic packaging, collaborations among actors had also been affected to enhance the expression of shared goals and visions upon the topic. For instance, 22 sector organizations have drawn up a Sustainable Packaging Sector Plan 2019-2022 in collaboration with the KIDV, which contained concrete objectives and measures, aiming to reduce the amount of packaging material and make packaging fully recyclable and reusable (KIDV, 2019d). Furthermore, other key actors in the transition and the system's transformation, such as Shell, began advocating a shared vision for plastic packaging (PR Newswire Europe, 2019b). Issues regarding the use of recycled content and food contact that had existed in the past began to be addressed, which allowed for more profitable operations regarding achieving the goals related to using the material. As supported by KIDV, if producers could demonstrate that the characteristics of the recyclate and their process meet the requirements for food safety, it is possible to deviate from the target percentage (KIDV, 2019a).

More attention was paid to the engagement of consumers in the mission by many PROs. The European Commission launched a pledging campaign over awareness for the recycling of plastics, actions towards the separation and collection of plastics for effective recycling, and initiatives and rules over labelling (PR Newswire Europe, 2019b), which proved exceptionally fruitful, since several research showed increasing support among consumers for separate collection (KIDV, 2018a). Moreover, future expectations concerning citizens and their behaviors began rising, with new requirements arranged for recycling in order for governments to meet the 2025 targets (Keating, 2019). At the same time, plastic producers, such as LyondellBasell, began advocating further for the acceleration of MR by focusing on the





engagement of the total value chain (MediaNet Press Release Wire, 2020). However, by 2019, the necessity of further upgrading recycling methods and techniques had become more apparent (PR Newswire Europe, 2019b), which stimulated comprehensive research on the topic by numerous PROs to gain more insight into specific sorting and recycling options for plastic packaging (KIDV, 2020a). Nonetheless, the negative reputation concerning the unrecyclable nature of flexible plastic packaging and the structure of the recycling system raised considerations about the path's performance (KIDV, 2019a). It also appeared that the Dutch collection, sorting, and recycling structure had not yet been set up for several solutions and directions from the CEFLEX design guidelines, while only PE is sorted and recycled as a mono-material (approximately 55% of all flexible materials) (KIDV, 2019a).

There were still issues that created problems in the acceleration of the demand, which primarily involved recyclers, such as the high cost associated with plastic recycling processes (PR Newswire Europe, 2019b). These technical and economic bottlenecks, in combination with the non-transparent market for recycled plastic, in particular, hindered the use of the material (KIDV, 2019a). In addition, the low prices of petroleum decreased the accelerating demand for recycled content, which was expected to be balanced by the middle of 2020 (PR Newswire, 2018). Moreover, consumers did not appear to be fully engaged with the path due to alterations in the final product's appearance and aesthetics (KIDV, 2019a). Plastic producers also experienced issues in engaging with recycled content due to difficulties in comprehending the regulatory framework, as confirmed in Tilburg University's discussions with manufacturers and importers of packaged products (KIDV, 2019a).

In 2020 and 2021, waste suppliers have begun paying closer attention to details concerning recyclability by either experimenting more strongly with achieving the recyclability of particular materials that hinder the transition, such as PP or by redesigning all the components of the packaging to be fully recyclable, rather than only the main component. In particular, Friesland Campina's R&D department has also developed a new "zipper" that enables (the label) the separation from the bottle (Basic Materials & Resources Monitor Worldwide, 2021), while Nestlé launched recyclable solutions for its Purina wet pouches in collaboration with Amcor (Nestlé, 2020). Finalized summaries and informative platforms have been developed as a result of the knowledge diffused in the mission, such as the KIDV's Recycle Checks to help companies make their packaging recyclable (KIDV, 2021a) and the Pack forward website, which provides an overview of essential themes that influence the sustainability of packaging. Nonetheless, PROs, such as CEFLEX and KIDV, have introduced multiple guidelines and roadmaps that enhance the prioritization of MR issues within the agenda and the guidance of recyclability matters while reinforcing the achievement of the agreed targets (CEFLEX, 2020), (KIDV, 2020a). Moreover, further clarifications over when those goals/targets would be enforced were also announced. In particular, the Dutch recycling targets and the European recycling targets would be enshrined in law and implemented with effect from 2021 (Thai News Service, 2020).

The participation of third parties, such as certification schemes, enhanced the conception of the legitimacy of the products placed on the market. For instance, cyclos- HTP, an independent testing laboratory, certified Amcor's Eco-Tite R (Newstex Blogs, 2020). Several



platforms were developed to coordinate the value chain and keep pace with the transition, and progress reports were also being conducted. For example, the Platform of Sustainable Packaging Innovators is a platform focused on innovation in packaging (KIDV, 2021b). Other initiatives were also affected as a response to keeping pace with the mission, such as the "New Plastics Economy Global Commitment", an initiative that units more than 500 signatories in the value chain around various 2025 targets in line with a shared vision of achieving a CE for plastics, launched by Ellen MacArthur Foundation and the United Nations Environment Program (VEOLIA, 2020). However, the COVID-19 pandemic impaired the performance of the path by increasing the amount of plastic consumed and hindering the separation and recycling process (States News Service, 2020). Furthermore, there is no sufficient demand or a well-performing stream for r PP (Plastic Recyclers Europe, 2020), while exports of plastic waste continued, which are negatively influencing the mission (States News Service, 2020); (CE Noticias Financieras English, 2020a).

### Functional Analysis of Mechanical Recycling

The historical event analysis indicated that the drivers of this path are associated with the high experimentation undertaken by the value chain regarding recyclability, either in product design or the optimization of recycling technologies (MF1). High directionality and guidance on recyclability also exist. Actors have prioritized this path in the circular agenda, agreed on the shared goals and targets, and published strategies, plans, and roadmaps to navigate the further acceleration of the path (MF4A). Furthermore, sufficient market creation exists, with numerous waste suppliers placing recyclable products on the market, increasing customer demand for such circular solutions (MF5). The value chain promotes the acceleration of the path by advocating or lobbying for it through their actions and commitments (MF7). The path drivers and their patterns indicate that MR is experiencing the early stages of the acceleration phase, with demand currently being established.

However, the analysis also identified several barriers related to the mission's functions. On occasions, particularly in the use of recycled materials in food contact, the legislation was highlighted as confusing by plastic producers (-MF4B), who become discouraged with supplying recycled materials resulting in problems created in demand despite the quality recycle. Nonetheless, differentiation in the mechanical characteristics of recycled plastics, such as transparency or color, also negatively affects the demand for such materials both in a B2B and B2C level (-MF5). Moreover, the strong orientation that the mission has for certain plastic materials over others (PE over PP) creates a market gap in the supply-demand of plastics. This barrier reinforces the lack of infrastructure for flexible plastics other than PE and hinders the further acceleration of the system (-MF8). While the Dutch recycling systems for flexible plastic packaging can optimally recycle only PE, the waste supply is formatted correspondingly, and attention to developing infrastructures for other flexible plastics, such as PP, decreases significantly (-MF6). Finally, exporting flexible plastic packaging waste reinforces the old, linear system and destabilizes the allocation of the resources to the path (-MF6).

Figures 3–11 depict a graphical representation of the path per year and per function. For each of the MFs, the number of gathered events with a positive or negative effect on the path per year is presented.

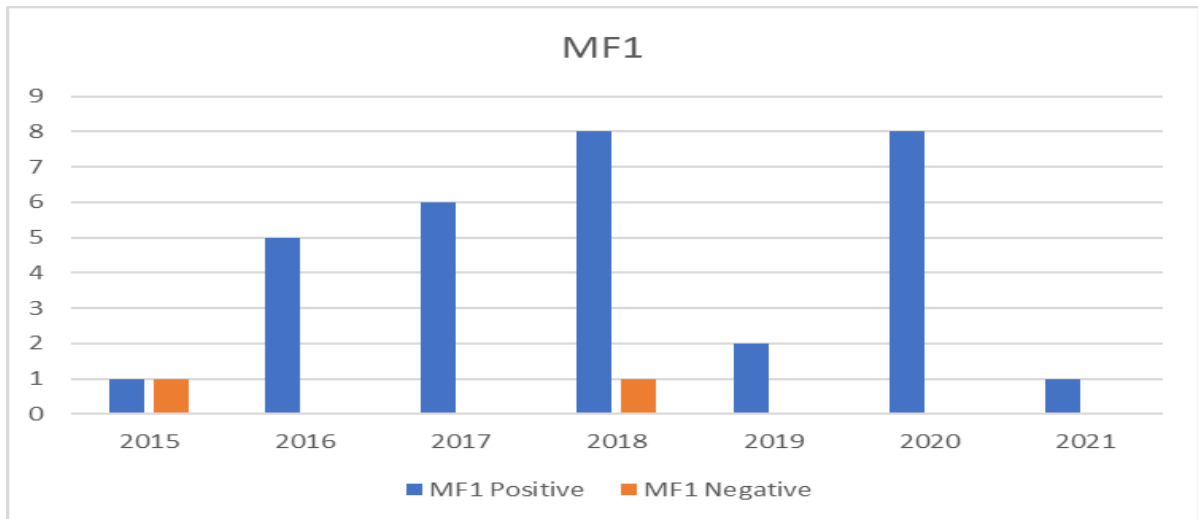


Figure 3: Overview of the fulfilment of MF1 per year  
Source: Own Creation

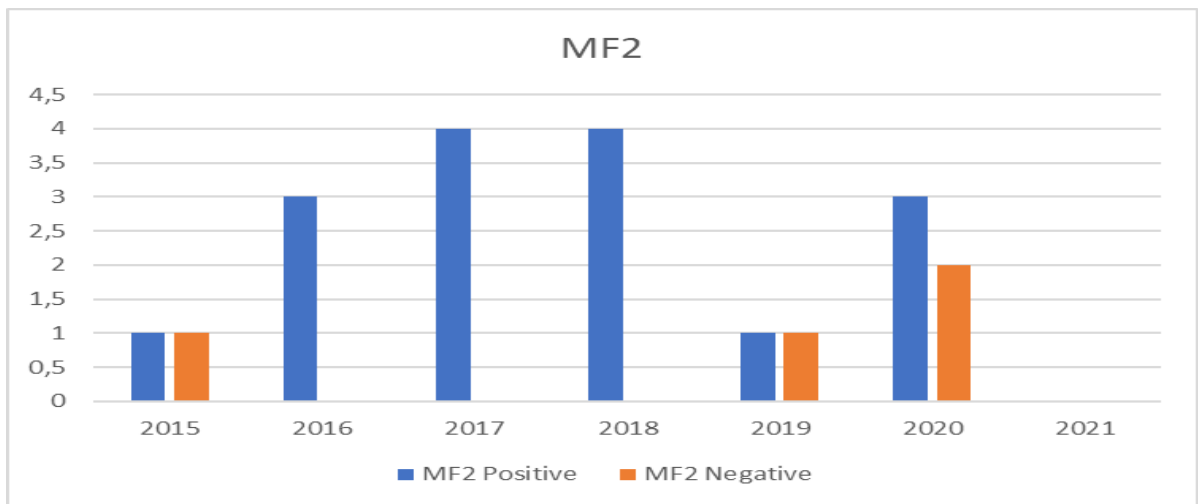


Figure 4: Overview of the fulfilment of MF2 per year  
Source: Own Creation

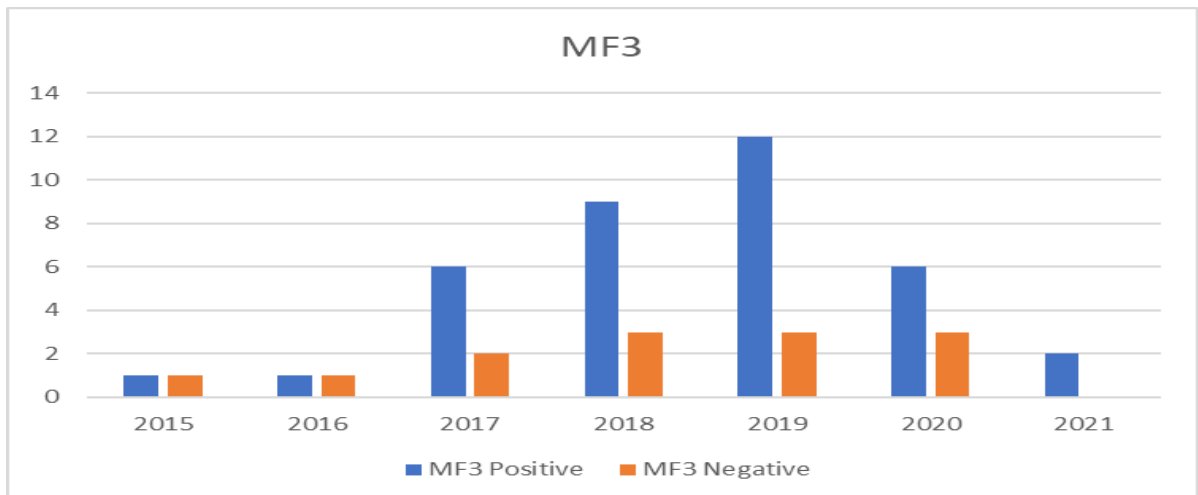


Figure 5: Overview of the fulfilment of MF3 per year  
Source: Own Creation

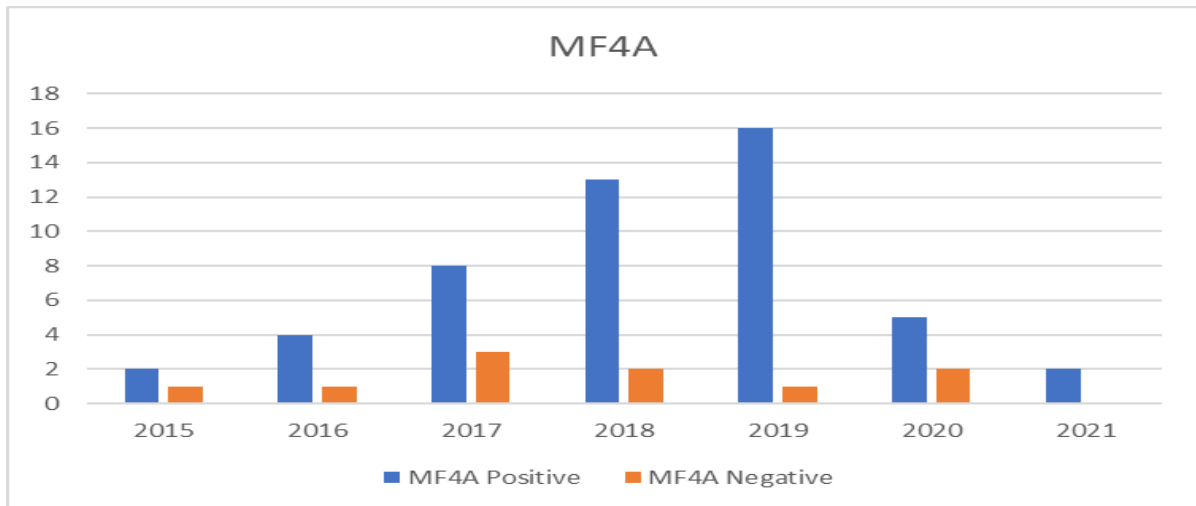


Figure 6: Overview of the fulfilment of MF4A per year  
Source: Own Creation

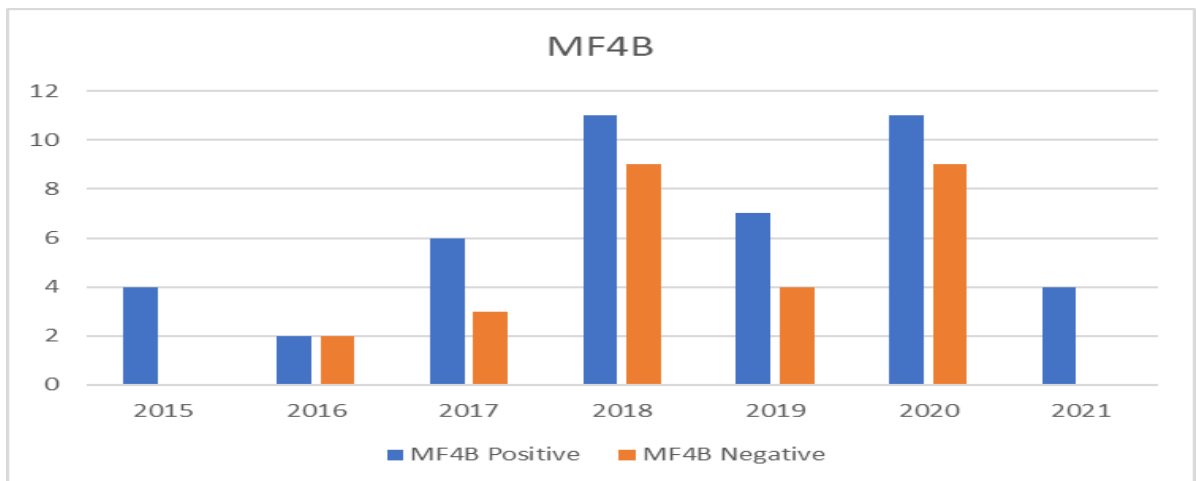


Figure 7: Overview of the fulfilment of MF4B per year  
Source: Own Creation

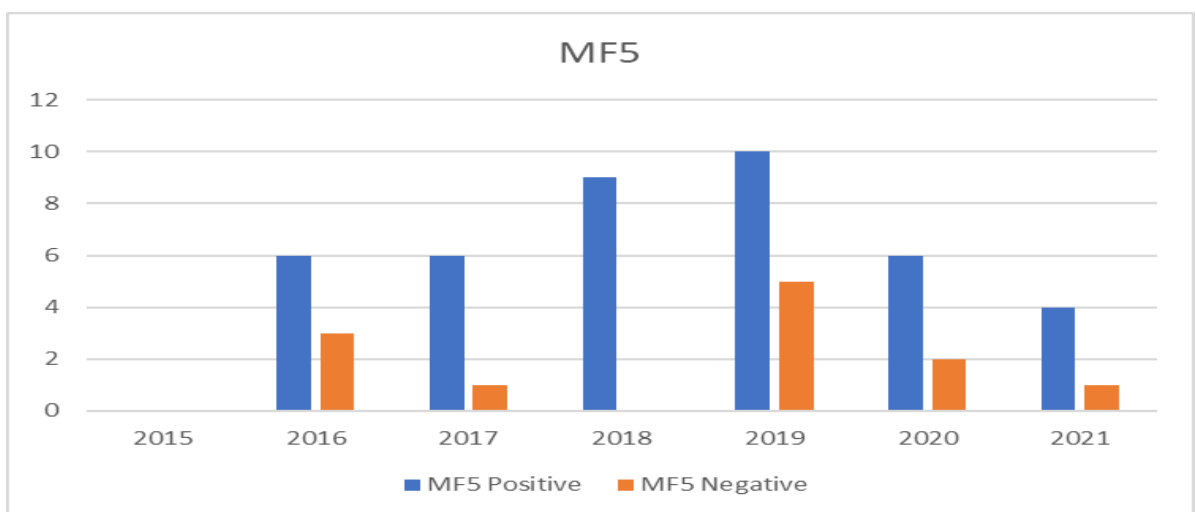


Figure 8: Overview of the fulfilment of MF5 per year  
Source: Own Creation

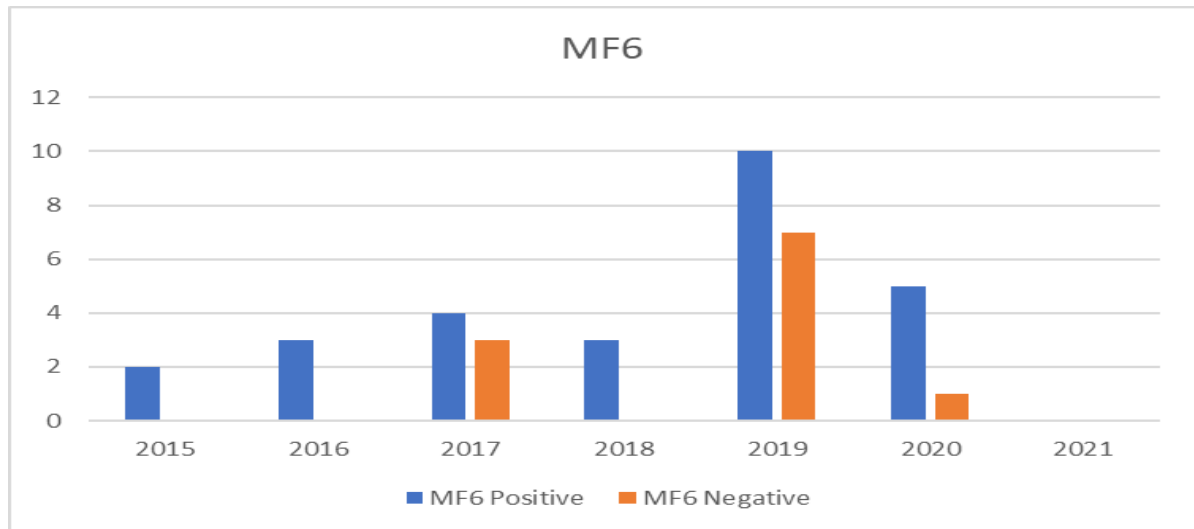


Figure 9: Overview of the fulfilment of MF6 per year  
Source: Own Creation

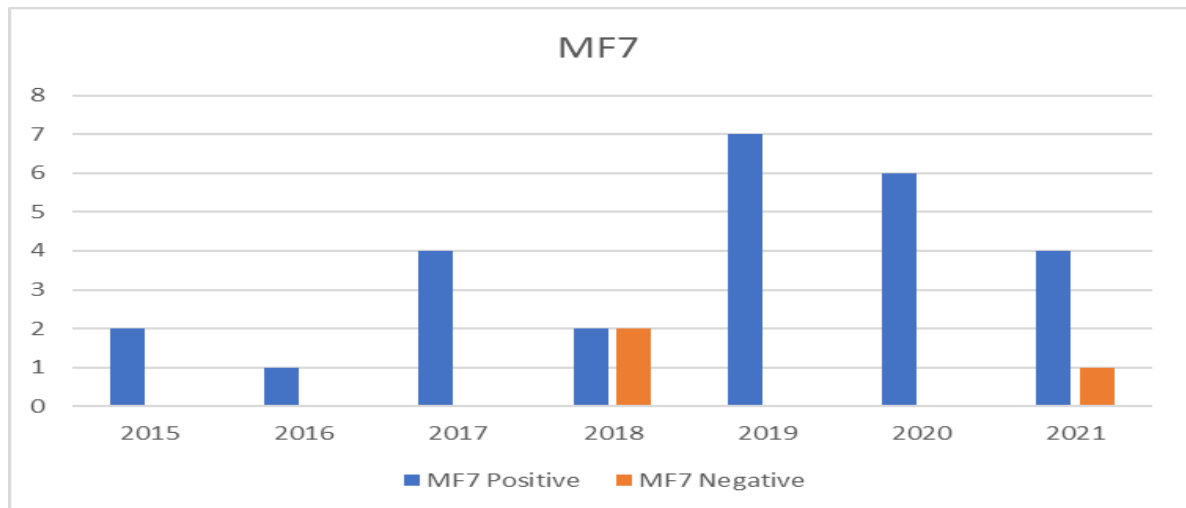


Figure 10: Overview of the fulfilment of MF7 per year  
Source: Own Creation

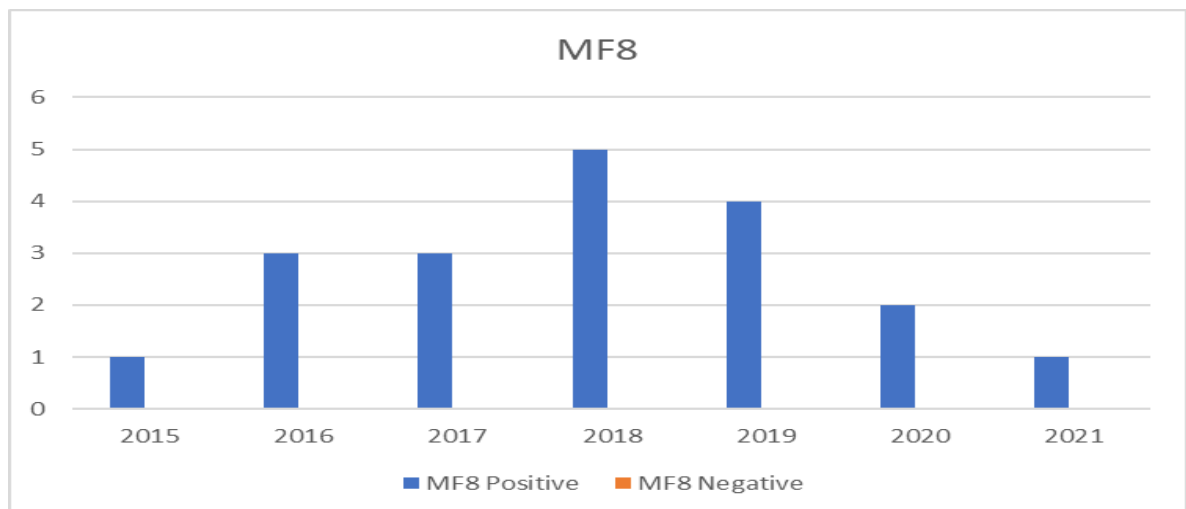


Figure 11: Overview of the fulfilment of MF8 per year  
Source: Own Creation



### 5.3.2. Chemical Recycling

#### *Historical Event Analysis (2015–2021)*

Agreement on the goals and targets of CR occurred in the later stages of the transition. It mostly involved the industry itself, with many incumbent plastic producers promoting initiatives to focus attention on CR and include it as a priority in the circular agenda and engage more actors in the shared goals. Many plastic producers, particularly incumbent and niche companies, experimented with chemically recycling flexible plastic packaging, with many promising pilot projects occurring in the NL (North Sea Foundation, 2017). In 2017, actual plants were established that attempted to recycle plastic packaging and develop new products. Examples included Fitzroy Amsterdam, which took a new approach to chemically reusing beach plastics for packaging by establishing a new plant in the NL (Basic Materials & Resources Monitor Worldwide, 2017). Other plastic producers conducted agreements and collaborations with several institutions, such as LyondellBasell, which signed an agreement with the Karlsruhe Institute of Technology to develop a new catalyst and process technology to break down post-consumer plastic packaging, into monomers for reuse in polymerization processes (ICIS Chemical News, 2018b). Actors began increasing their financial support toward the path by funding multiple events and projects and making new infrastructure available as part of a EUR 6.3 million budget from the EU (Ahlstrom, 2017). In the following year, other actors became involved, such as the government, with initiatives that promoted the development and upscaling of the path and the engagement of the value chain towards the resource conservation and climate gains regarding CR (KIDV, 2018b). However, the further engagement of other actors in the chain, such as plastic producers, was considered important for the path to gain the corresponding legitimacy (KIDV, 2018b). However, more attention and the reallocation of the resources of other actors, especially the EU, were essential for the further acceleration of the path (ICIS Chemical News, 2018c).

By 2018, it was clear that CR involved challenges, and the exchange and diffusion of knowledge were placed in the spotlight for several challenges to be addressed (KIDV, 2018b). The publication of finalized studies and factsheets began providing more specific insights about the path. In fact, some of the results were highly profitable and reinforced the positive perception of CR in the Dutch market, with several plastic waste streams getting potentially recycled in the future (KIDV, 2018b). Despite the favorable potential of the path to achieving circularity, it was stated that chemical recycling was unlikely to become sufficiently extensive in a short enough time that is proposed (ICIS Chemical News, 2019). However, it was expected that higher levels of participation by actors in the path would increase the directionality and enhance its development (ICIS Chemical News, 2019).

No stimulation of the market occurred until 2019, when more activities for upscaling the market were introduced, and actors, especially recyclers and plastic producers, began collaborating to support further prosperity regarding the path (ICIS Chemical News, 2019). Examples of such collaborations included the one between RPC and Netherlands-based paints and coatings firm AkzoNobel (ICIS Chemical News, 2019). From 2019 onwards, both waste suppliers and PROs began announcing more ambitious pledges to accelerate the development of the path by expressing positive commitments and setting relevant targets. Shell, for example, announced its ambitious plan to use one million tons of plastic waste per year in its chemicals' plants by 2025 (PR Newswire, 2019), while the Netherlands wants 10% of domestic plastic production to be replaced by recycle from chemical recycling by 2030 (KIDV, 2020b).



Moreover, other plastic producers partnered with chemical producers to enhance the acceleration of the path in the market. In particular, Berry Global Group announced its collaboration with global chemical industry leader SABIC for producing and using polyolefin resins made from chemical recycling (Berry Global Group, 2019). More financial transactions took place in the years that followed, involving investments, funding, and sponsorship. Examples included the virgin polymer producer Indorama investing in companies in the USA and the Netherlands (Industrial Goods Monitor Worldwide, 2019), or the EU-funded project aiming to depolymerize MMA and chemically recycle (ICIS Chemical News, 2019). Moreover, several actors organized coalitions focused on the acceleration of the path. The European Coalition for Chemical Recycling brought together associations along the plastics value chains with an interest in the development and use of chemical recycling (European Coalition for Chemical Recycling, 2021), while the Alliance to End Plastic Waste is a non-profit organization uniting the value chain and working with finance, governments and civil society (Alliance to End Plastic Waste, 2021). In addition, essential waste suppliers, such as Shell, were also identified and participated in some of those coalitions to accelerate the path (PR Newswire, 2019). Plastic producers began announcing the launching of materials in the market derived from chemical digestion as part of their portfolio and primarily by conducting deals between industries. For instance, SABIC and Plastic Energy will develop the TRUCIRCLE portfolio, made from upcycling mixed and used plastic with chemical digestion (Chemical Industry Digest, 2021).

### Functional Analysis of Chemical Recycling

In this case, the function driving the acceleration of the path is mostly the high expectations of the value chain regarding CR's ability to achieve a CE within the domain (MF4B). These expectations are also reflected in the high experimentation conducted by waste suppliers (MF1) and the effort to coordinate the value chain by organizing relevant coalitions (MF8). Thus, the path drivers and their patterns indicate that CR is experiencing its development phase, in which the high levels of experimentation will eventually result in the commercial application of the produced materials.

However, issues in developing a united definition for the path and what it entails obstruct its development (-MF4A). In particular, while using the output products as fuel is currently not classified as recycling in Europe (KIDV, 2019b), many actors perceive otherwise. Nonetheless, no established market currently exists, and the path is expected to be commercialized over the next five years (-MF5).

Figures 12–20 depict the graphical representation of the path per year and per function. For each of the MFs, the number of gathered events with a positive or negative effect on the path per year are presented.

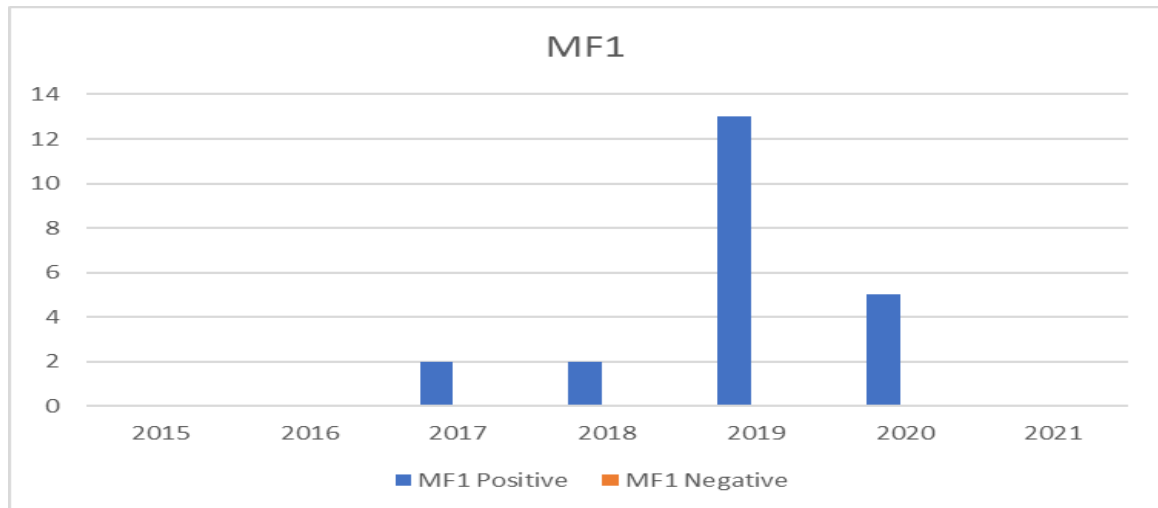


Figure 12: Overview of the fulfilment of MF1 per year  
Source: Own Creation

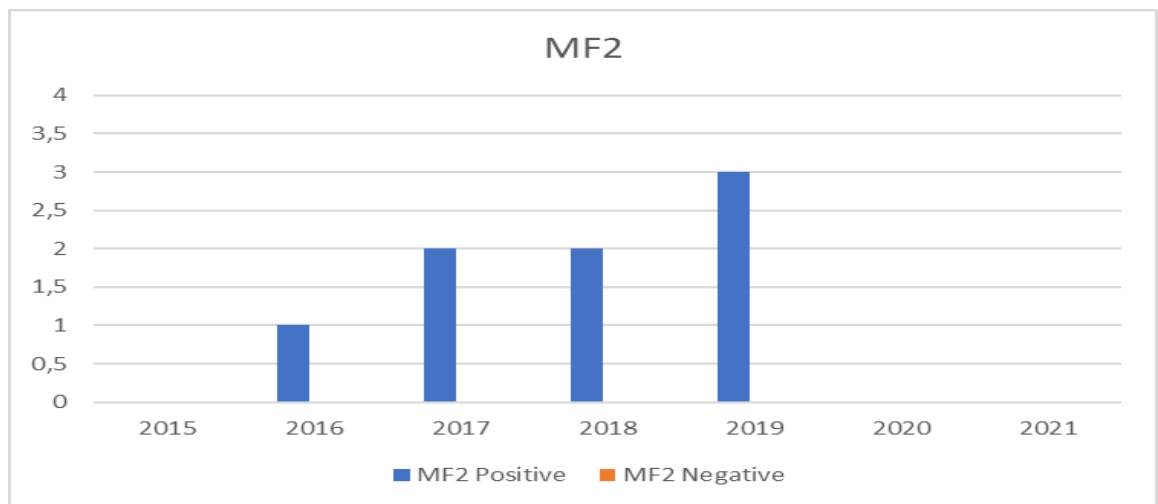


Figure 13: Overview of the fulfilment of MF2 per year  
Source: Own Creation

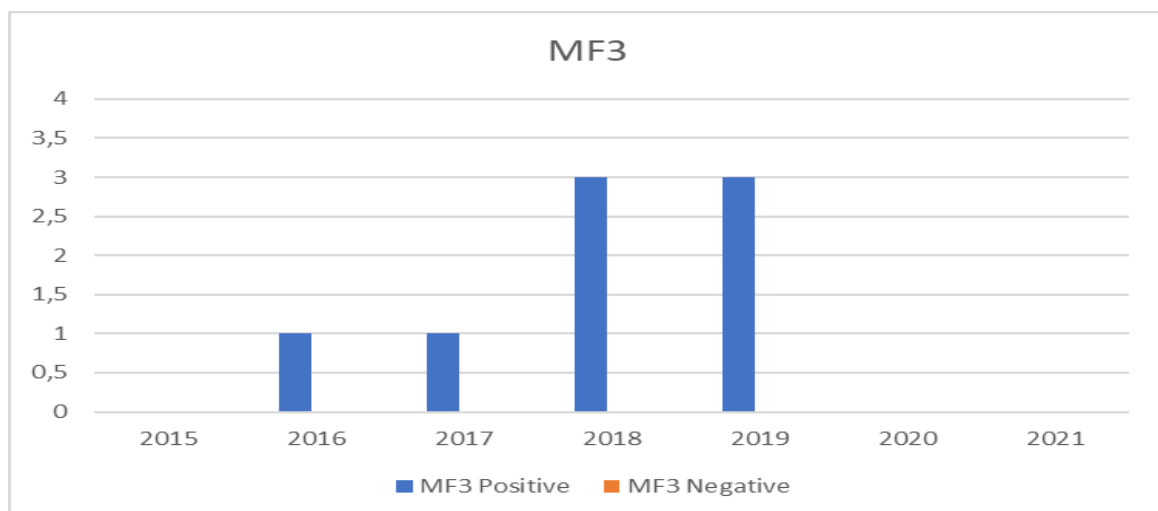


Figure 14: Overview of the fulfilment of MF3 per year  
Source: Own Creation



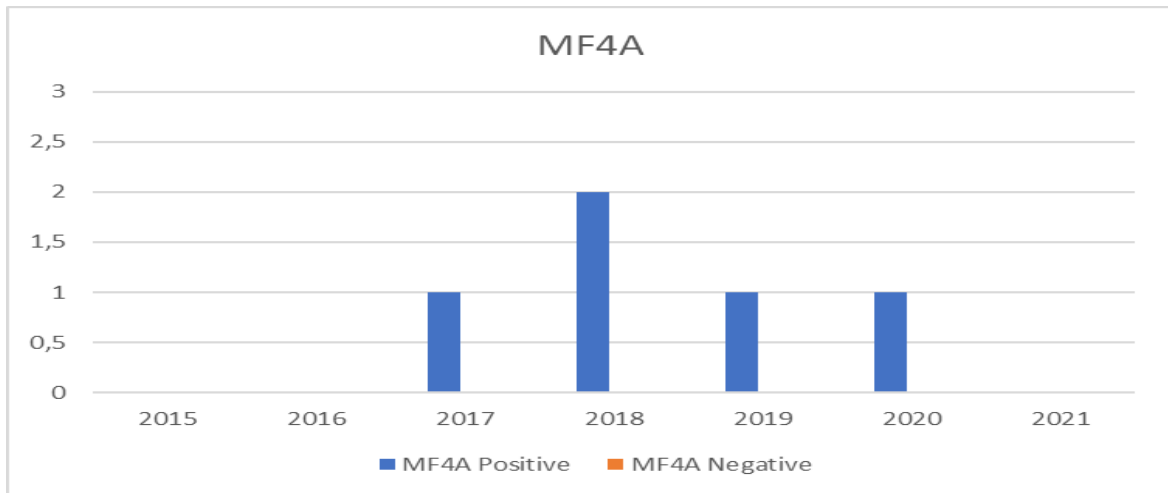


Figure 15: Overview of the fulfilment of MF4A per year  
Source: Own Creation

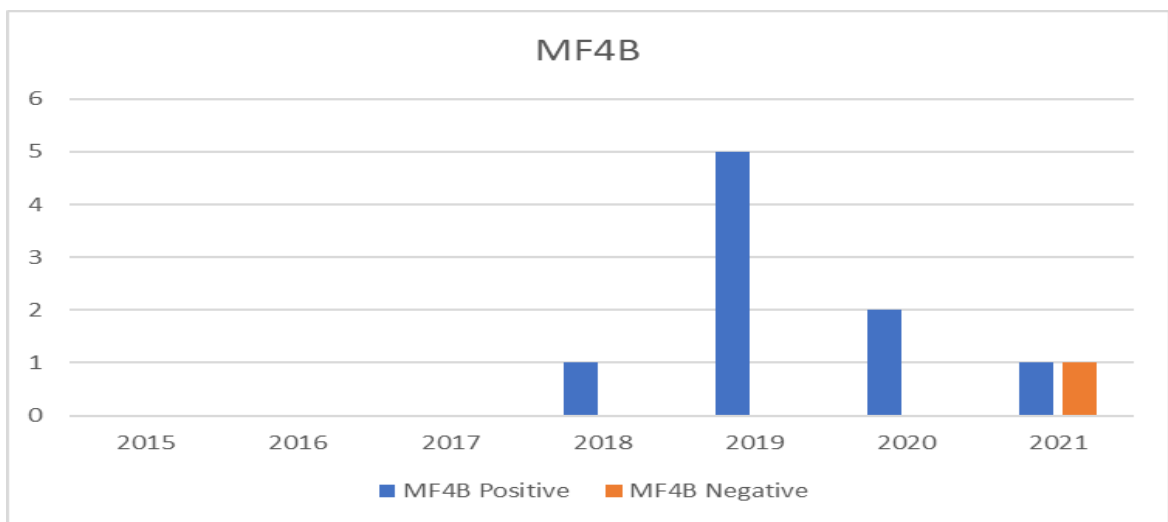


Figure 16: Overview of the fulfilment of MF4B per year  
Source: Own Creation

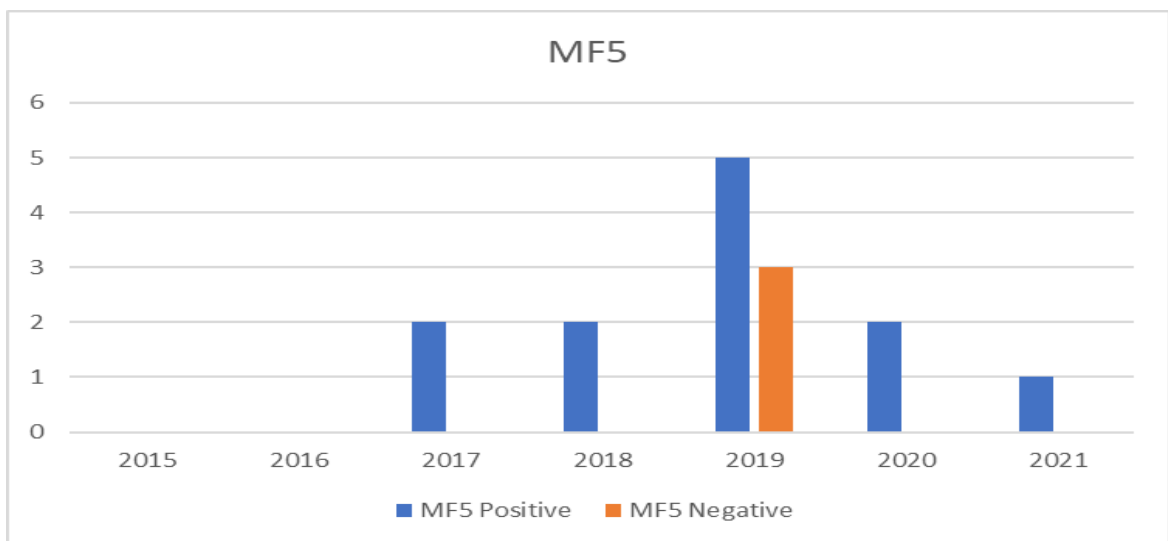


Figure 17: Overview of the fulfilment of MF5 per year  
Source: Own Creation

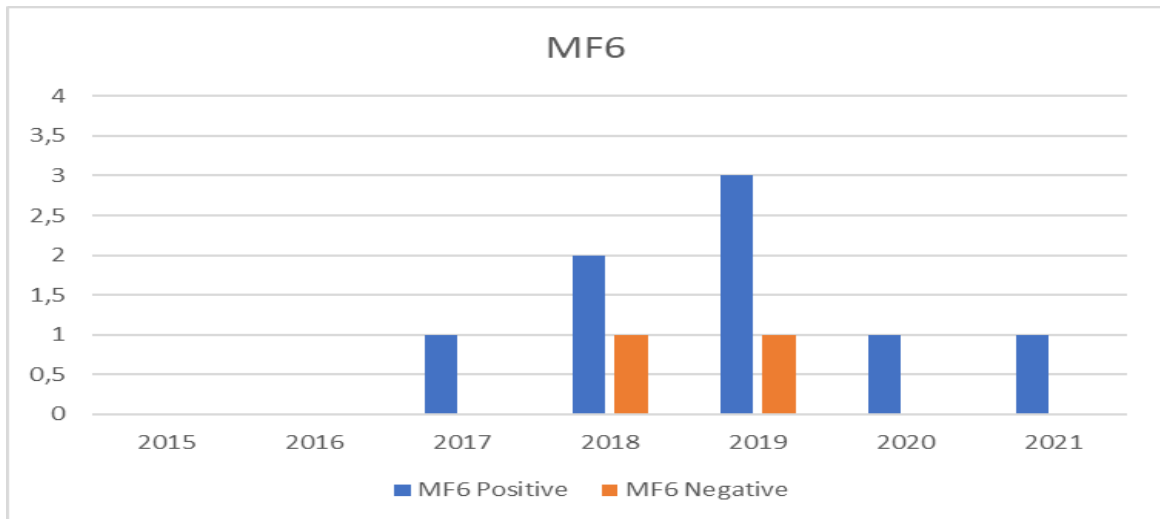


Figure 18: Overview of the fulfilment of MF6 per year  
Source: Own Creation

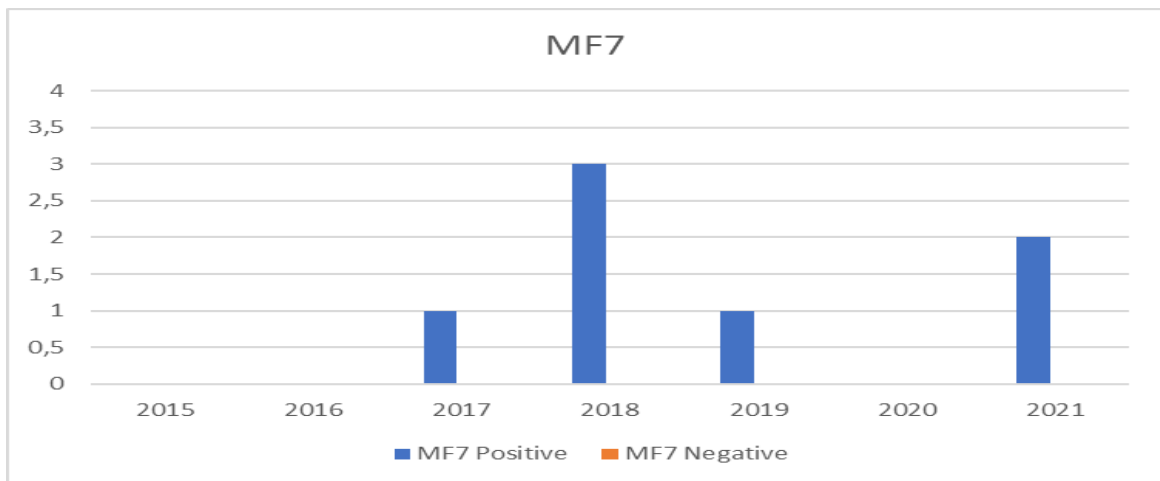


Figure 19: Overview of the fulfilment of MF7 per year  
Source: Own Creation

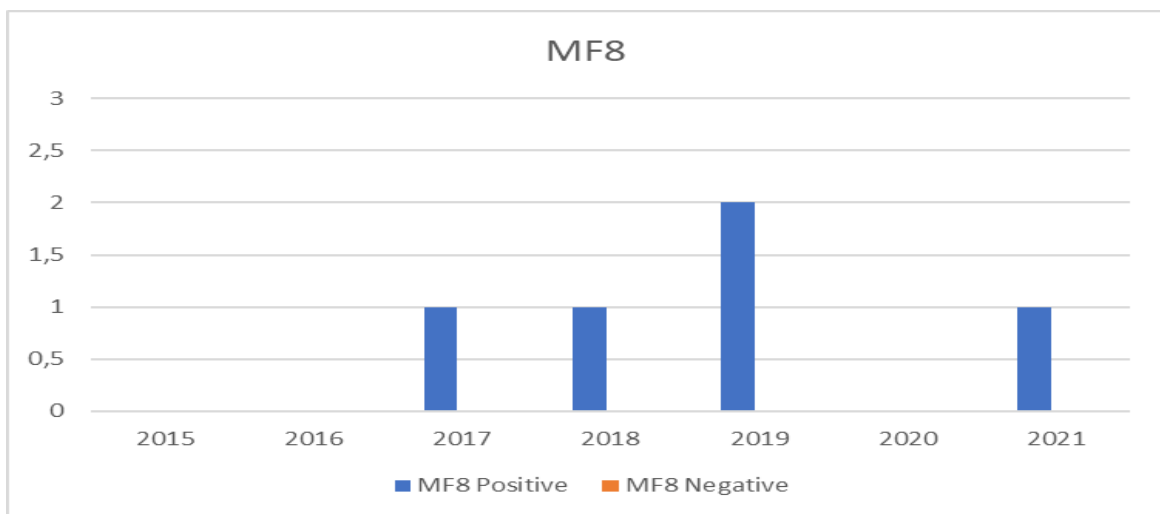


Figure 20: Overview of the fulfilment of MF8 per year  
Source: Own Creation



### 5.3.3. Bioplastics

#### Historical Event Analysis (2015–2021)

Since 2015, plastic producers have experimented with bioplastics and announced future launches in the market. For instance, Teknor Apex had announced a new series of masterbatches for polylactic acid (PLA) bioplastic (Product News Network, 2015). Moreover, from the early stages of the transition, companies within different sectors have experimented with processes of water treatment that result in bioplastics as by-products (PR Newswire Europe, 2015). Other projects, introduced as collaborative actions between plastic producers and organizations, aimed at developing biodegradable flexible products as valuable substitutes for conventional plastic. Examples included TNO and Dutch bioplastic producer Rodenburg collaborate to manufacture biodegradable sanitary napkin (Bioplastics Magazine, 2015). Actors actively developed new knowledge regarding flexible plastic packaging by conducting collaborative research projects with knowledge institutions, such as universities. Paper Foam worked with Aachen University to formulate bio-based packaging while avoiding the dreaded moisture effects from Veuve Cliquot use (Industrial Goods Monitor Worldwide, 2015). Several projects that began as experiments became fruitful in the years that followed, which resulted in an extension of the – potentially collaborative – research to obtain more insights about product design. For instance, the collaboration between Bio-on and AkzoNobel aimed to further explore the use of biodegradable and bio-based polymers in coatings to prevent the unwanted accumulation of marine organisms (Thomson Reuters Practical Law, 2015).

Simultaneously, courses and workshops for identifying and overcoming limitations in using bio-based materials in flexible plastic packaging were also taking place. Further efforts were made to clarify the role of bioplastics within the CE, involving knowledge institutions and the government. In particular, the report by research agency CE Delft and the Ministry of Infrastructure and the Environment gave significant insights regarding under which conditions bio-based plastics contribute to a circular economy (KIDV, 2017). Knowledge diffusion played an essential role for many actors in the value chain, which aimed to conduct deals between industries and sectors to transfer knowledge and assist in the upscaling of the path. For example, Holland Bioplastics was established to share as much knowledge as possible about bioplastics and to connect relevant parties. The aim was to provide clear, consistent information about the opportunities offered by bioplastics (Renewable Carbon News, 2015). Moreover, events and consortiums enhanced information concerning the mission among the actors. In 2017, the results of ongoing research allowed for a deeper comprehension of the path's role in the transition to a CE. CE Delft concluded that bio-based plastics could contribute to reducing CO<sub>2</sub> emissions and to reducing the demand for fossil raw materials (KIDV, 2017), while factsheets that illustrated the diffused knowledge of the topic began to be published (KIDV, 2017). However, even though valuable information was obtained concerning the better treatment of bioplastic, other studies revealed that this knowledge was not being well transmitted within the entire value chain, with several actors ignorant of the information. In a survey of 1,700 citizens published at the 11th European Bioplastics Conference in Berlin, almost half (43%) had heard of the term 'bioplastics,' but 84% of those had no idea what it meant (Eagle, 2018).

By 2018, companies had successfully established plants to produce bioplastics by using biotechnologies. Bio-on completed the first test phase for the unique bioplastic production



facility (Hugin, 2017), while in the Netherlands, Sappi has built a pilot-scale plant to produce cellulose nanofibrils (CNF) (PrintWeek MEA, 2020), which continued in the following years. Major actors in the value chain, mainly waste suppliers, began supporting the use of those materials by incorporating them into their commitments or even portfolios (KIDV, 2019c). However, the same attitude was not shared by all the actors in the value chain. In particular, the Dutch government failed to properly guide the acceleration of bioplastics, given that there are misunderstandings of the regulatory framework and the shared goals of the pathway (KIDV, 2019c). Accordingly, negative discourse arose regarding the existing confusion surrounding the shared vision of bioplastics, which also entailed the indirect effects of bioplastics in achieving a CE (KIDV, 2019c) ;(Simon, 2019).

The publication of the Action Plan for bio-based plastics by KIDV was aimed at escalating the demand for bioplastics and the saturation of the market (KIDV, 2020c). The Dutch market has demanded bioplastic packaging as a circular solution. At the same time, it is expected to attain higher growth post-2020, with the NL being an essential player (CE Noticias Financieras English, 2020b). The path has achieved significant acceleration due to the reallocation of financial resources by multiple actors in the value chain, such as increasing funds and grants by government bodies and universities to develop novel biomaterials (GlobeNewswire, 2021). However, the reallocation of resources towards bioplastics might also be linked to an indirect decrease in the allocation of resources to other sectors designed to achieve a CE. As stated in several articles, the term 'bio' is not synonymous with lower environmental impact, as alternative feedstocks to fossil fuels can be linked to high GHG emissions, compete with land for food purposes, or drive land use change (States News Service, 2020). Further engagement of the value chain has begun, with plastic producers developing advocacy partnerships to accelerate the path in other packaging aspects. In particular, the Interreg Northwest Europe project CurCol included partners from research labs in Ireland, Germany, Belgium, and the Netherlands and developed biodegradable yellow pigments (Coons, 2020). Finally, waste suppliers have organized coalitions to keep pace with the transition, while multiple events to coordinate redesign or reorientations in the path involving the entire value chain have taken place. For instance, in Europe, a multi-country collaboration was investigating to replace synthetic dyes in bioplastics with non-toxic alternatives made from turmeric (Coons, 2020).

### Functional Analysis of Bioplastics

The historical event analysis indicated that the factors driving the path are mostly connected to the industry. Waste suppliers have experimented with the materials directly or indirectly (bioplastics as by-products of other processes; MF1). Moreover, plastic producers and retailers/brands have placed such products on the market, allowing for the further establishment of the path in the mission (MF5). Thus, bioplastics are experiencing their take-off phase in the mission, in which the market for such materials is growing.

However, the analysis also identified several barriers related to the MFs. First, the legislation itself appears to be one of the essential obstacles. The regulatory framework is perceived as complex and unclear regarding the product design requirements and recovery of bioplastics (-MF4). Nonetheless, despite the existence of multiple products made of bioplastics in the market, consumers have difficulty comprehending the differences between bio-based and biodegradable plastics and how they should dispose of them (-MF7). Finally, despite clarifying the contribution of bioplastics to the path to a CE, they are still not strongly supported by the



essential actors in the value chain, such as KIDV, which prefer recyclable and reusable packaging bioplastics (-MF7). The indirect effects of bioplastics on other aspects of climate change, such as land use, create second thoughts about the eligibility of the path (-MF4B).

Figures 21–29 depict the graphical representation of the path per year and per function. For each of the MFs, the number of events with a positive or negative effect on the path per year are presented.

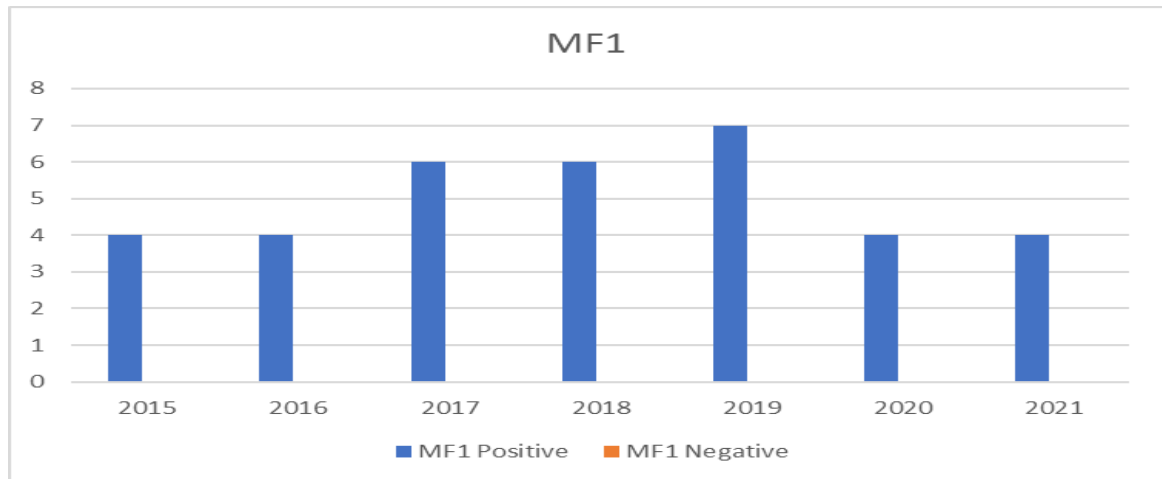


Figure 21: Overview of the fulfilment of MF1 per year  
Source: Own Creation

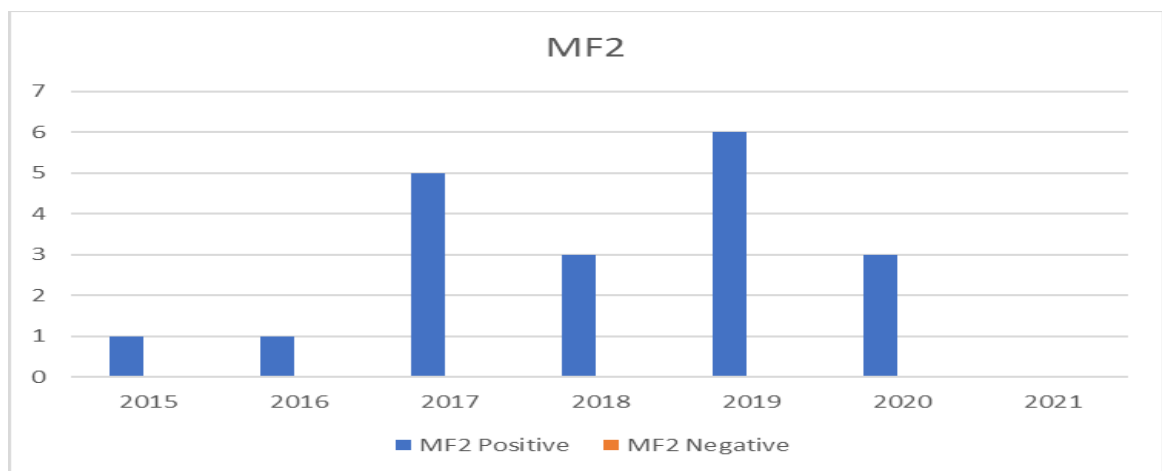


Figure 22: Overview of the fulfilment of MF2 per year  
Source: Own Creation

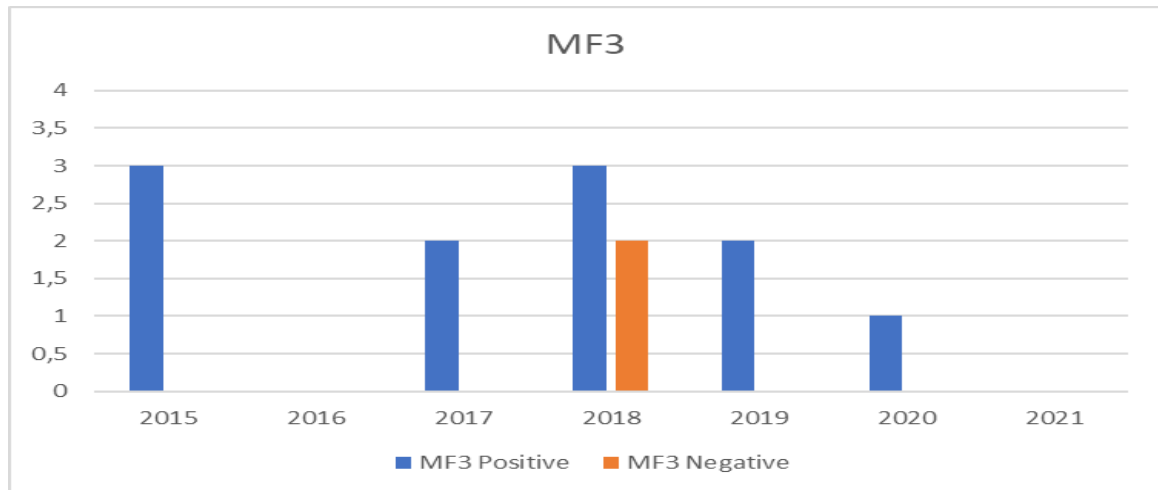


Figure 23: Overview of the fulfilment of MF3 per year  
Source: Own Creation

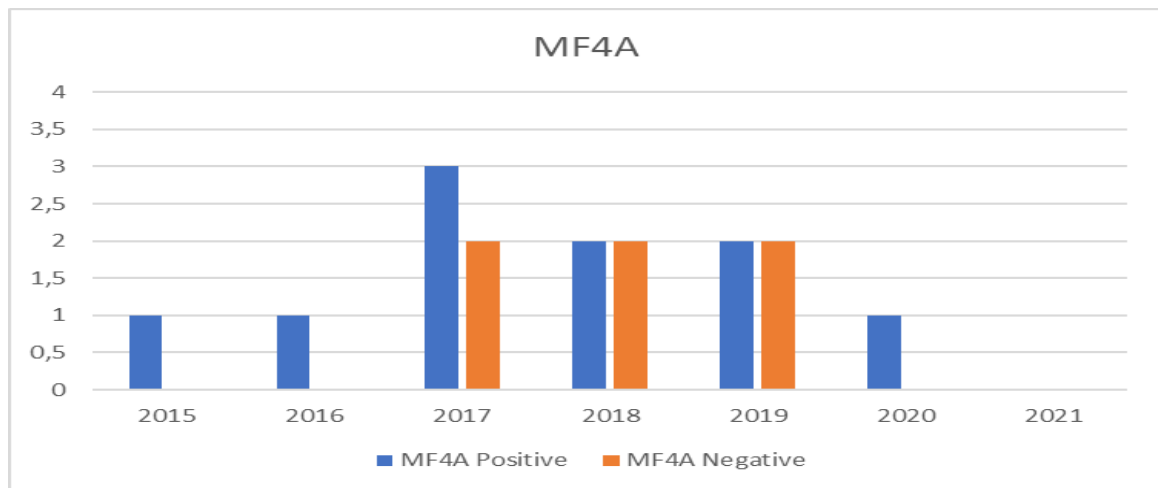


Figure 24: Overview of the fulfilment of MF4A per year  
Source: Own Creation

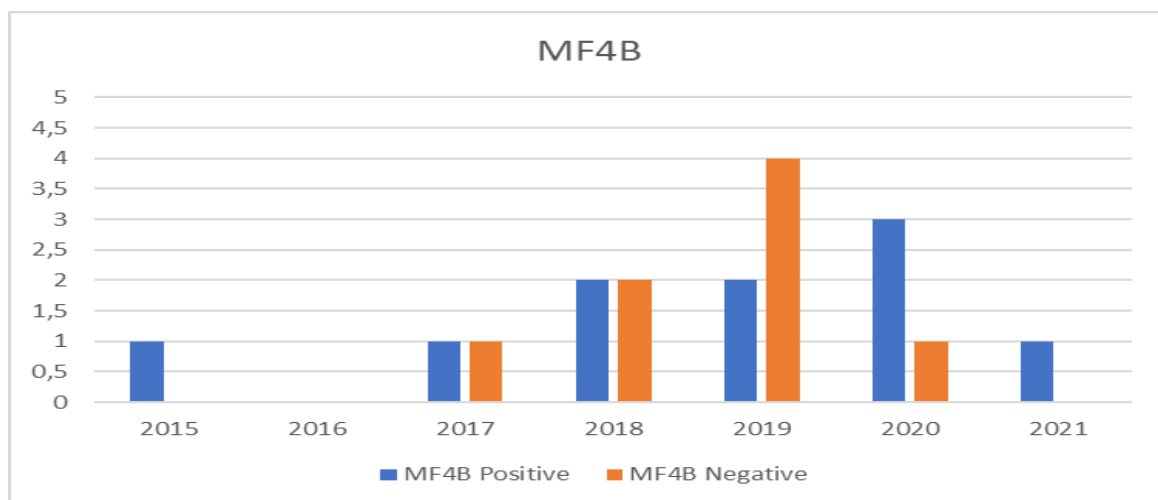


Figure 25: Overview of the fulfilment of MF4B per year  
Source: Own Creation

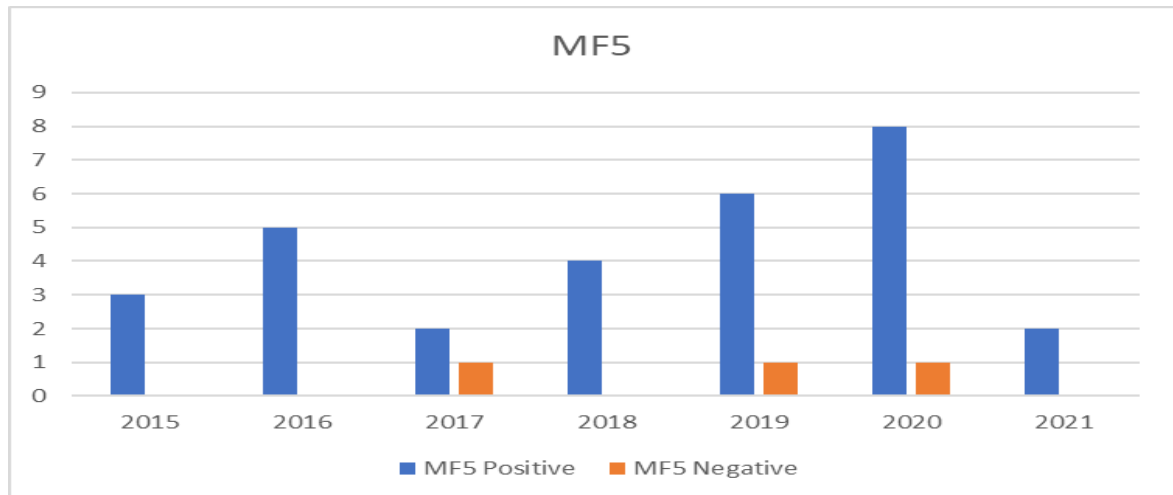


Figure 26: Overview of the fulfilment of MF5 per year  
Source: Own Creation

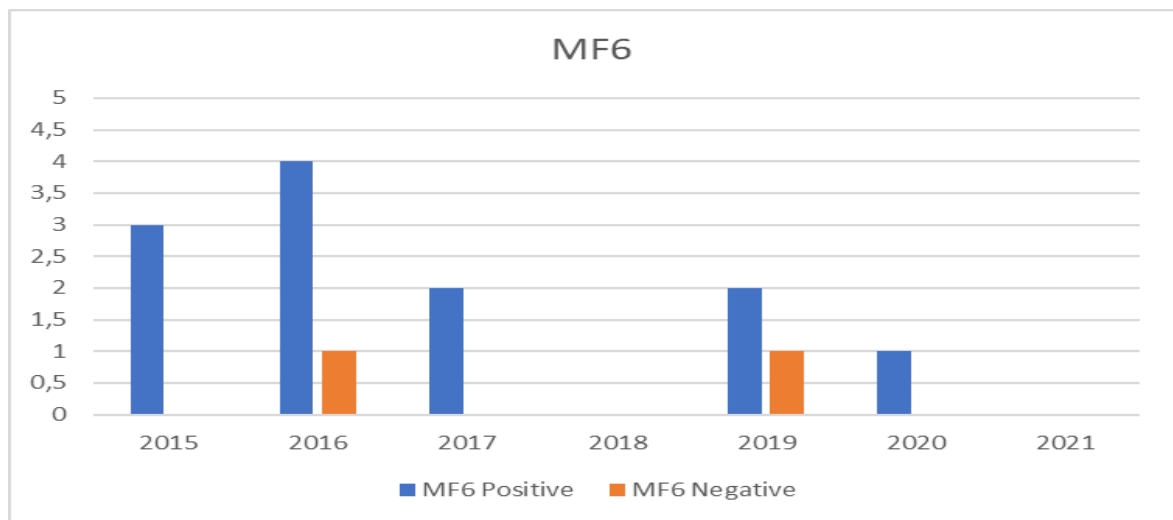


Figure 27: Overview of the fulfilment of MF6 per year  
Source: Own Creation

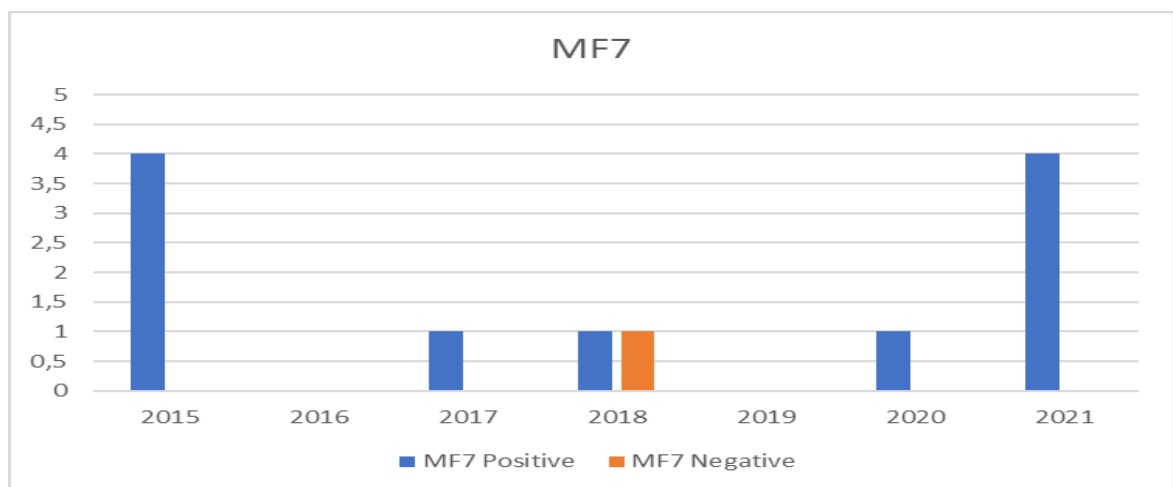


Figure 28: Overview of the fulfilment of MF7 per year  
Source: Own Creation

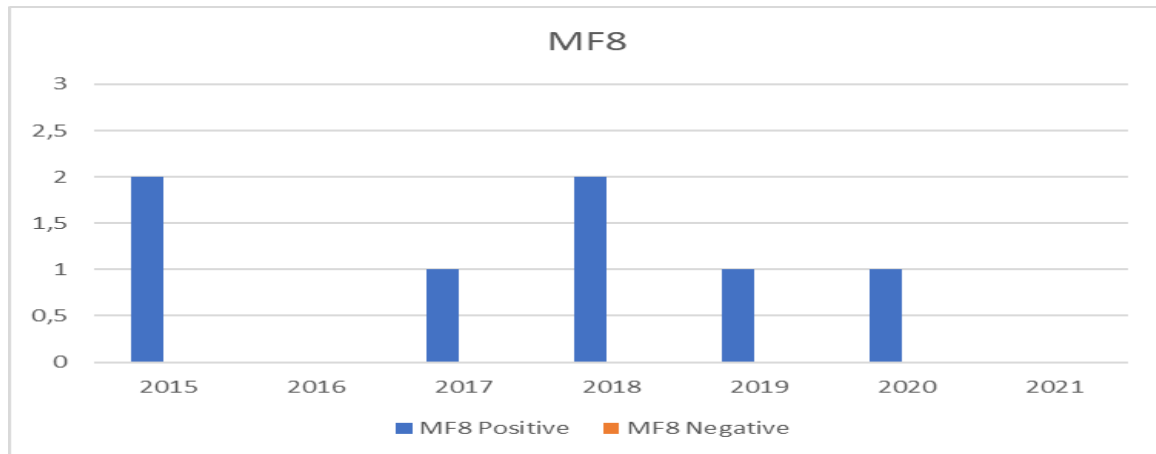


Figure 29: Overview of the fulfilment of MF8 per year  
Source: Own Creation

### 5.3.4. Reusables

#### Historical Event Analysis (2015–2021)

From the early stages of the transition, the value chain had already begun committing to the reusability of plastic materials. The Raw Material Agreement suggested having the Dutch economy operating based on reusable raw materials (Government of the Netherlands, 2017). The industry also agreed with prioritizing the path in the agenda (States News Service, 2017). However, in 2017, waste suppliers were held to account for not appropriately keeping pace with the goals. In particular, Greenpeace specifically criticized the lack of "commitments, targets or timetables to reduce the amount of single-use plastic bottles used" (Cooper, 2017). The lack of development and information about the reusability of plastic packaging was apparent from the early stages of the transition. From 2017, actors in the value chain, specifically PROs, began expressing their concerns about the absence of know-how on the reusability of plastic packaging. Greenpeace's report exposed the lack of progress in reusing bottles and suggested that this needs to be given greater prominence in sustainability strategies if further damaging criticism was to be avoided (Cooper, 2017). However, the value chain had established more serious engagement with this path by 2018. At that time, several waste suppliers announced the removal of multiple single-use products, while PROs expressed higher expectations of the upcoming requirements in product design endorsing reusability (ICIS Chemical News, 2018c). Simultaneously, the EU Commission proposed a ban on single-use packaging to further accelerate the direction of the path, with multiple waste suppliers responding with the removal of certain products. For instance, Lipton has discontinued the use of plastic straws and lids in all cocktails and plastic mashers in the hospitality industry (Targeted News Service, 2019). In 2020, a Directive came into force, which implemented the ban of single-use plastic packaging by July 2021 while setting higher percentages in the desired goals for reusable plastic packaging (States News Service, 2020). In particular, 74% of all packaging materials in the Netherlands must be recycled and reused by 2025 (Thai News Service, 2020). Moreover, this year, significant actions have been undertaken by Dutch retailers to achieve the desired goals. Examples included Albert Heijn wanting the plastic bags to disappear from all Dutch stores by the end of this year at the latest (Retail Detail, 2021).





## Functional Analysis of Reusables

In this case, the historical event analysis indicated that PROs have strongly supported the contribution of this path to the CE within the domain. The increase of reusable, flexible plastic packaging has been highlighted among the value chain and the shared mission (MF4A). Significant actors in the value chain, such as KIDV, advocate packaging reusability (MF7). Moreover, the single-use plastic directive that bans disposable packaging by July 2021 is a substantial measure for keeping pace with the path by reorienting the value chain (MF8). The path is experiencing its predevelopment phase, in which the direction of the path is established, and potential prototypes may occur.

However, the analysis also identified multiple barriers that relate to the MFs. The industry is not active in experimentation regarding the path (-MF1), while reusable plastic packaging is almost nonexistent in the market (-MF5). In addition, the value chain seems to be missing know-how aimed at implementing reusability in the sector (-MF2). Nonetheless, all those barriers are also reflected in the significantly low reallocation of resources towards this path (-MF6).

Figures 30–38 depict the graphical representation of the path per year and per function. For each of the MFs, the number of events with a positive or negative effect on the path per year are presented.

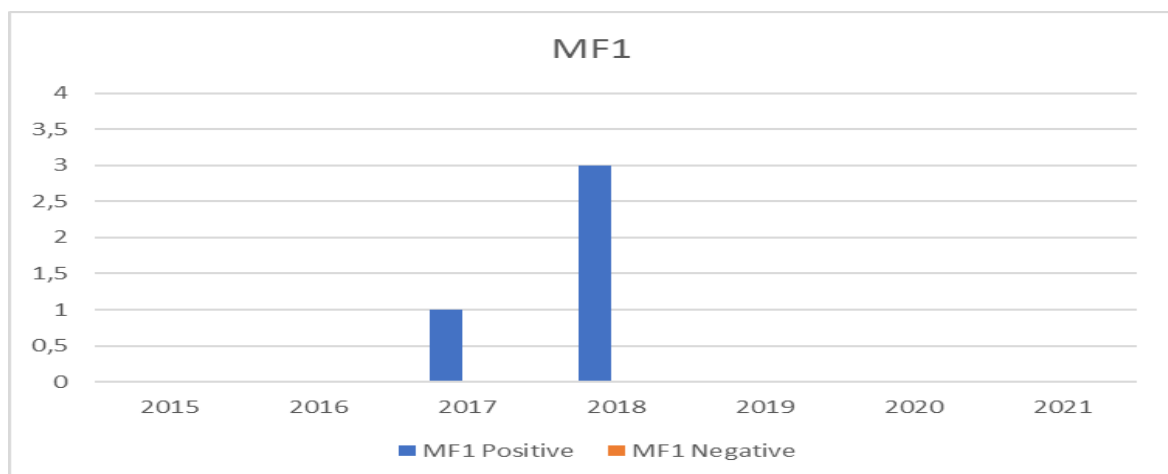


Figure 30: Overview of the fulfilment of MF1 per year  
Source: Own Creation

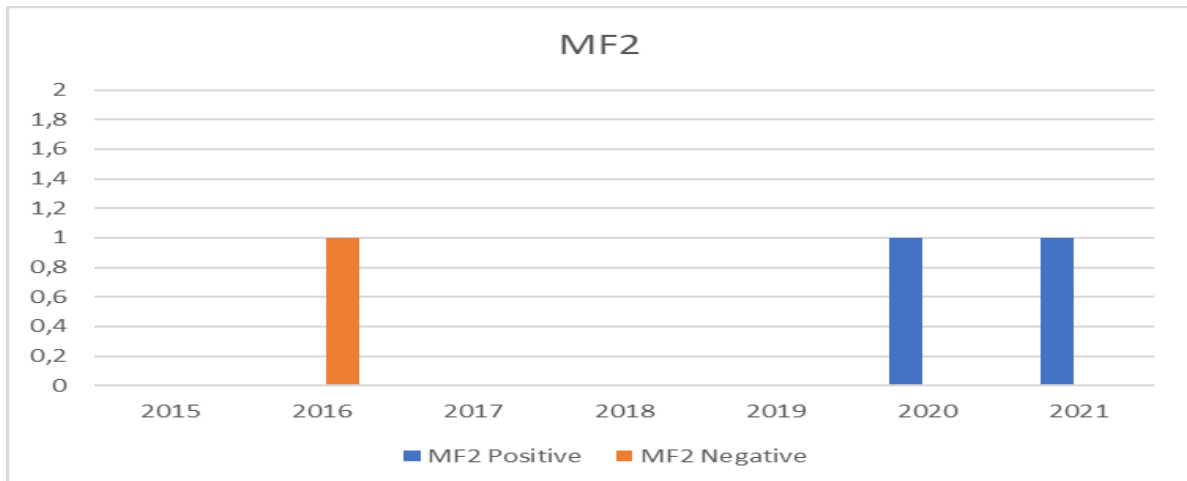


Figure 31: Overview of the fulfilment of MF2 per year  
Source: Own Creation

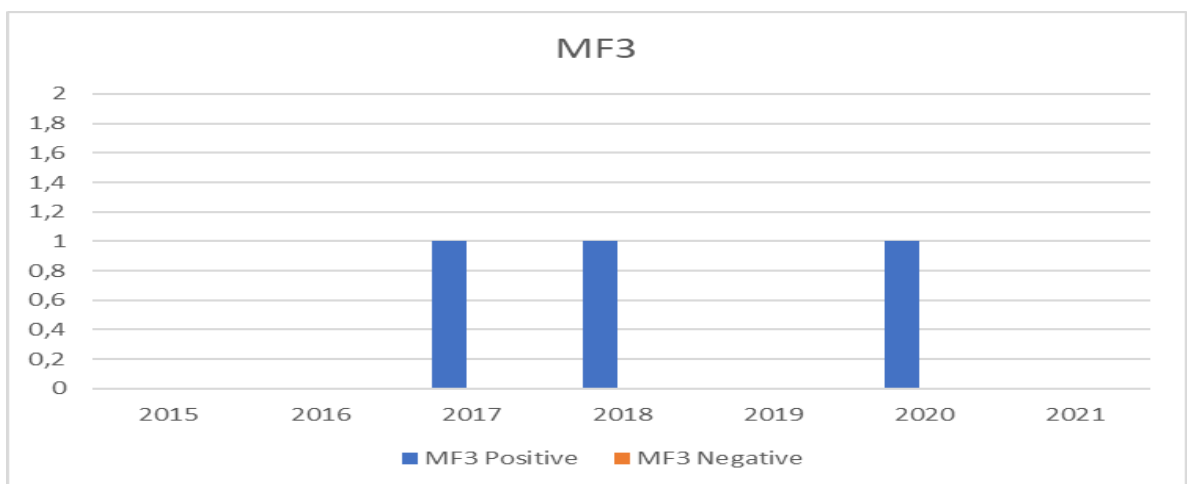


Figure 32: Overview of the fulfilment of MF3 per year  
Source: Own Creation

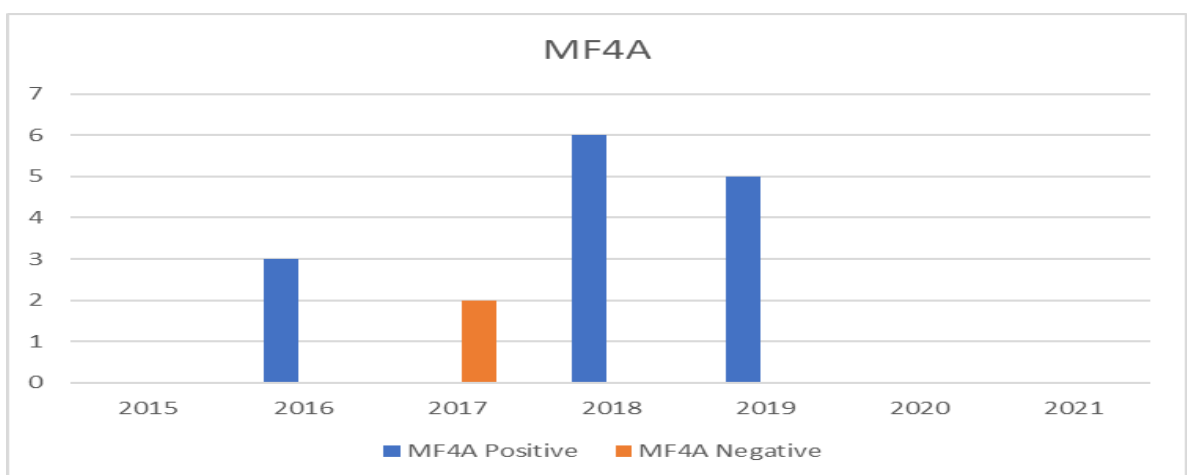


Figure 33: Overview of the fulfilment of MF4A per year  
Source: Own Creation

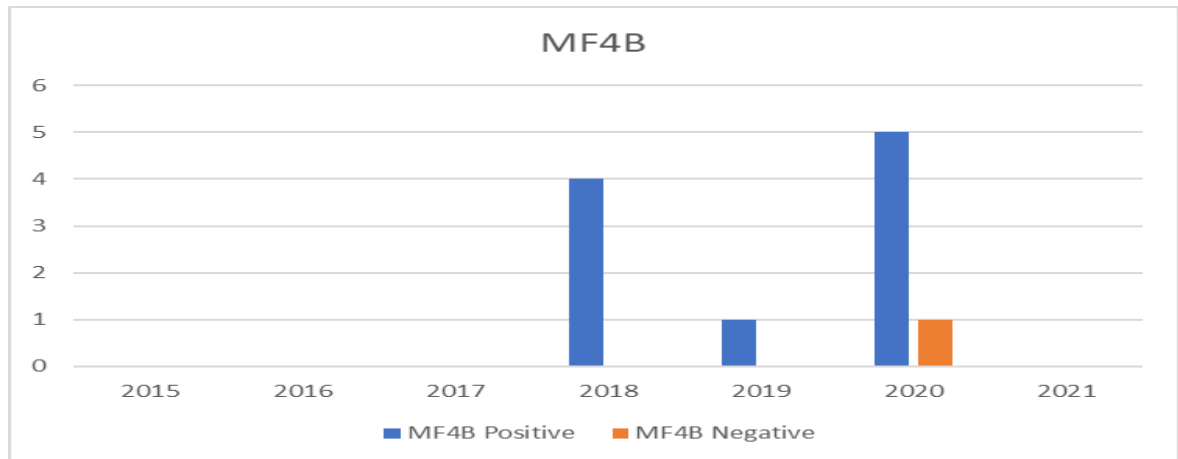


Figure 34: Overview of the fulfilment of MF4B per year  
Source: Own Creation

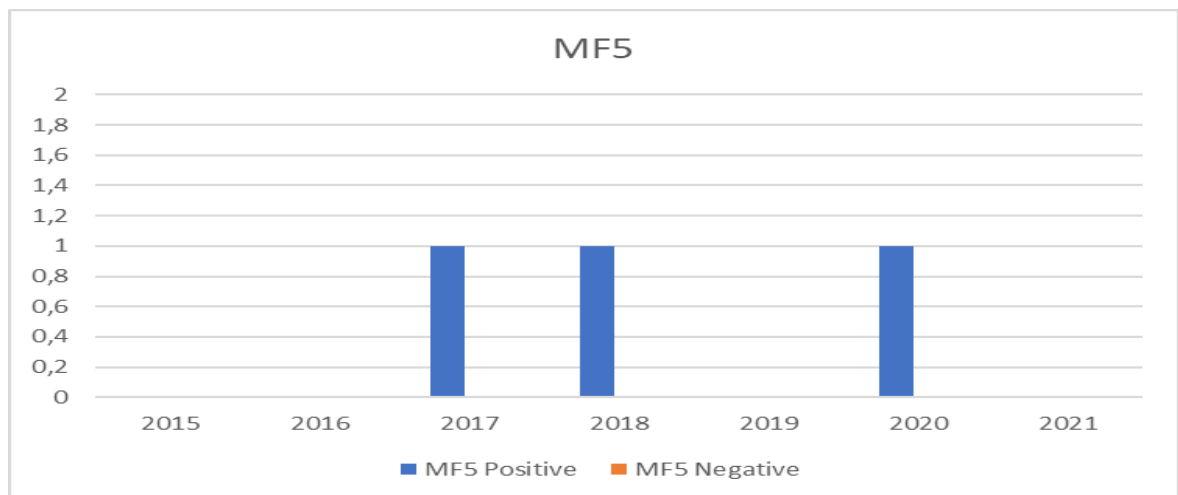


Figure 35: Overview of the fulfilment of MF5 per year  
Source: Own Creation

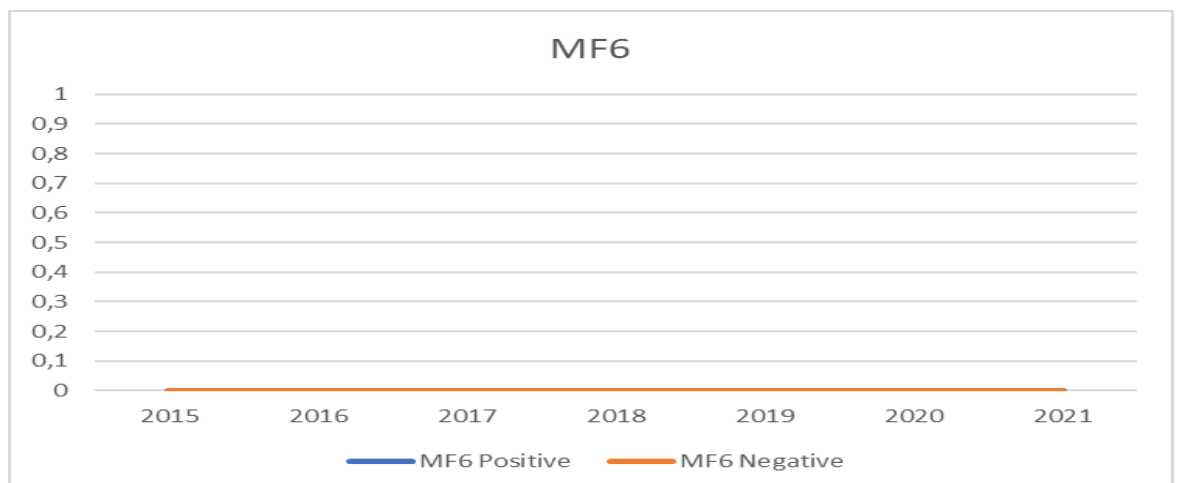


Figure 36: Overview of the fulfilment of MF6 per year  
Source: Own Creation

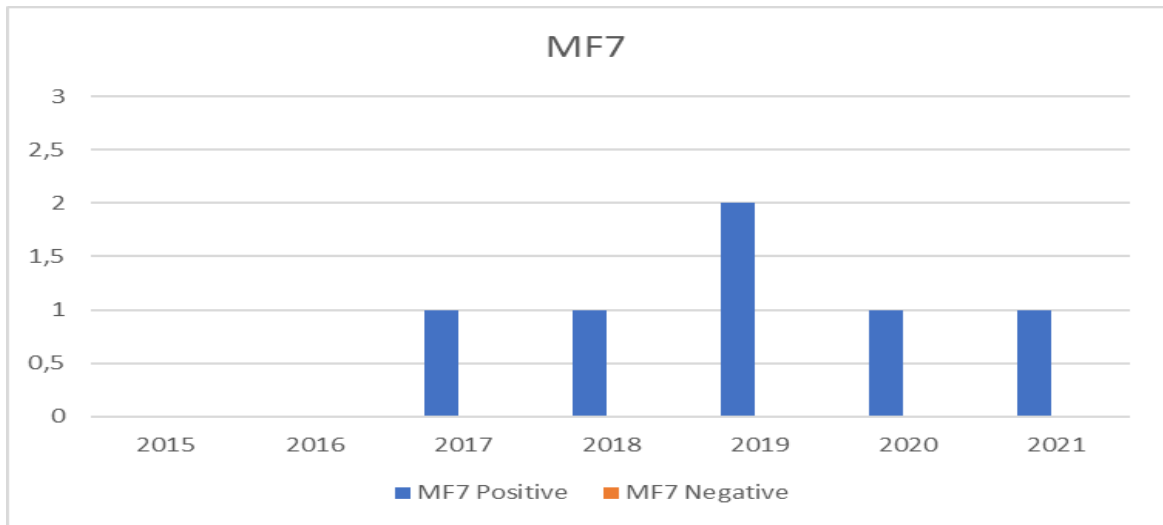


Figure 37: Overview of the fulfilment of MF7 per year  
Source: Own Creation

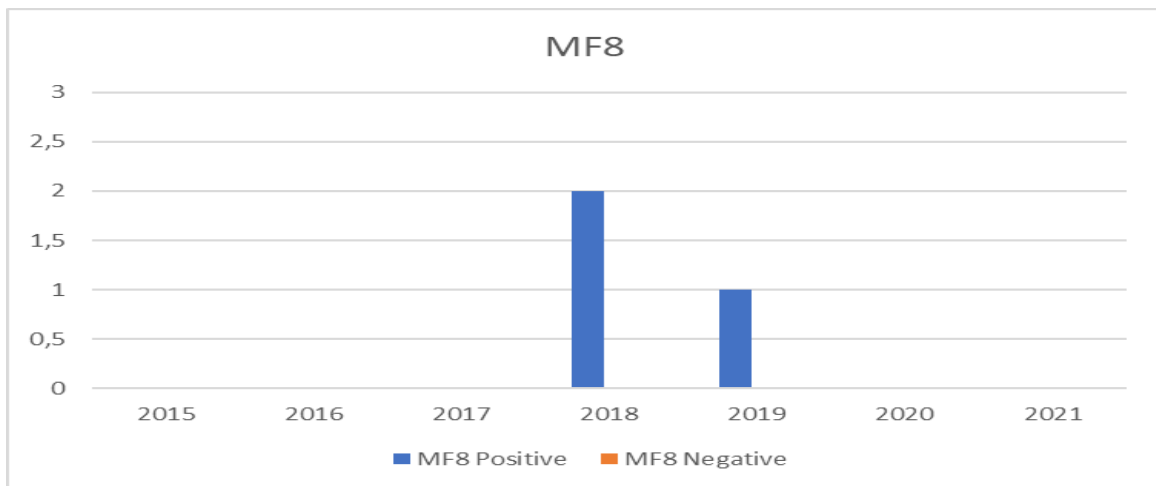


Figure 38: Overview of the fulfilment of MF8 per year  
Source: Own Creation



## 6. ANALYSIS

### 6.1. Interaction Between Paths

Several relationships among the paths were identified through the historical event analyses. The significant attention paid from the early stages of the transition to MR has assisted in exploring alternative methods of recycling and the gradual establishment of CR in the circular map (complementary). At present, the two paths are experiencing an independent course, with the value chain primarily focusing on MR. However, the future development and optimization of CR may entail the destabilization of MR in the mission. The value chain might perceive CR as the ultimate solution and stop considering recyclability when designing and manufacturing or disposing of plastic products, resulting in pollution from different combinations of plastics or additives that will disturb any recyclability process. Nonetheless, despite the acceleration of CR in the mission and its support, several actors suggest it should not be perceived as the "holy grail" and advocate more substantial support towards design for recyclability.

Moreover, bioplastics appear to have a dual relationship with MR. On the one hand, the two paths have a symbiotic relationship because if bioplastic is not disposed of properly, it may hinder the recycling process and decrease the value of the recyclate. On the other hand, the two paths also have a competing relationship regarding business operations. For plastic producers, it is easier to claim circularity in their portfolios by manufacturing bio-based or biodegradable products than totally recyclable ones due to the properties of the functional barriers those materials possess. Moreover, despite several actors (i.e., consumers) appearing quite ignorant regarding bioplastics' fundamental properties, plastic producers tend to place more bio-based or biodegradable products on the market than recyclable ones. Nonetheless, bioplastics have been identified as contributing to some aspects of the CE that might create a rebound effect in demand for such packaging, with consumers preferring such products over others and considering them a legitimate, sustainable alternative. However, higher demand for bioplastics is simultaneously associated with competitive indirect effects on other aspects of sustainability, such as land use, land change, and biodiversity.

The high prioritizing of MR in the mission might also produce a competitive relationship with the other paths, especially reusables. The great attention paid to achieving the recycling goals and the design requirements has "occupied" the mission, which has resulted in the neglect of the reusability of plastic packaging within the domain. Reusability for flexible plastic packaging is almost nonexistent, despite the high directionality. However, to achieve circularity, a reduction in the volumes of flexible plastic packaging entering the system should also occur. The reduction of plastic packaging through reusability, in addition, would complement the performance of MR since less plastic packaging would need to be recycled.

### 6.2. Policy Developments

#### 6.2.1. Mechanical Recycling

In the case of MR, there is a coherent and precise direction through roadmaps, factsheets, and checklists concerning how plastic producers and retailers should operate in terms of recyclability for flexible plastic packaging. However, the regulatory framework is perceived as confusion regarding the use of recycled materials. In particular, difficulties in distinguishing the eligibility of recycled plastics for food contact may discourage the demand for such



materials. Nonetheless, significant and fluctuating price differences between virgin and recycled plastics decrease the demand for such materials. Therefore, the policies should orient towards balancing the regulatory framework, so it is understandable by the entire value chain and promote both recyclability in design and the implementation of recycled plastics. In this manner, the market gap between supply and demand could be stabilized, and further development of the path could occur.

Furthermore, a simplification of the regulatory framework in terms of applications of recycled plastics in food contact would reinforce the use of such materials by plastic producers and boost demand, which is necessary for recyclers and converters. Nonetheless, policies should focus on creating a breeding ground for recycled plastics over virgin ones, which could be achieved by levying a tax on virgin plastic packaging. In fact, as of January 1st, 2021, EU member states must pay €0.80/kilo of non-recycled waste (European Commission, 2021). Many countries in the EU have already begun implementing such measures. For instance, Italy taxes single-use plastic, except for compostable plastic or plastic made from recycled materials. Lithuania, in addition, taxes multilayer laminates, while the UK has implemented taxation on the packaging that is not made of at least 30% recycled materials (KIVO Group, n.d.). The adaption of stricter Extended Producer Responsibility (EPR) schemes could also enhance the breeding ground for recycled plastics. The NL has had EPR schemes in place since 2012, and progress has been made, but there is still considerable work to be done. At present, the mission and EPR schemes are focused on quantity over quality (The Polymer Research Platform, 2020). Consequently, there are recycling infrastructures in place, but they only operate with PE while PP is still neglected. EPR schemes should focus on coordinating the value chain towards developing the proper and necessary innovative solutions to stimulate the supply and demand of recycled plastics.

### 6.2.2. Chemical Recycling

In the case of CR, the value chain anticipates the acceleration of the path, while numerous plastic producers are already experimenting with the path. PROs have published several documents to navigate the acceleration of CR, and the existence of coalitions supports the coordination of the path. However, problems occur, as not all the actors define CR similarly, which fails to fulfil directionality. Nonetheless, the actors have stated that the path will be properly scaled up in approximately five years. Therefore, policies should precisely define what CR means to the CE and correspondingly engage all the actors. To achieve a faster scale-up, policies should take advantage of the high levels of experimentation and assist the value chain in incrementally placing products on the market, rather than expecting the “ultimate plan.” Moreover, once the CR is scalable, policies should pay close attention to promoting the path. While CR is broadly perceived as the “holy grail,” once it is commercialized, it could create severe rebound effects on the supply of flexible plastic packaging since the value chain might think that all the problems have been solved. However, policies should keep a low maximum percentage of chemically recycled flexible plastic packaging, mostly consisting of the amount of plastic that cannot be recycled in other ways. Therefore, CR policies should be oriented toward accelerating the path, but it should be considered a supplementary solution to the plastic problem, not the ultimate one.



### 6.2.3. Bioplastics

In the case of bioplastics, the industry itself is accelerating the path. Waste suppliers have been working with bioplastics. Indeed, once the contribution of bioplastics to the CE was identified, multiple products were placed on the market. However, the regulatory framework confuses the actors regarding how they should process those materials and consumers, as identified, who are not adequately engaged with the path by neglecting specific properties and requirements. Moreover, bioplastics are associated with indirect effects on other aspects of sustainability, such as land-use.

Therefore, policies should focus on a triad to accurately accelerate the path:

- a. Policies should simplify the regulatory framework and clarify any misconceptions by developing a closer relationship with waste suppliers and recyclers to find common ground regarding what is placed on the market and how it should be recovered.
- b. Policies should consider the indirect effects that the use of bioplastics has on the environment. To do so, policies could set a maximum ceiling on how many products made of such materials could be placed on the market by plastic producers. EPR schemes could also assist by ensuring that companies do not excessively use bioplastics while guaranteeing that any relevant product fulfils all the recyclability requirements.
- c. Attention should be paid to the proper engagement of end-consumers regarding the path by educating them regarding the properties and disposal of such products to not disturb the recycling process.

### 6.2.4. Reusables

Reuse has the lowest rate of development because, as far as could be ascertained, reusable, flexible plastic packaging is not represented in the (Dutch) market. However, reuse is an increasingly important topic as it is in line with the policy goals of achieving a CE in 2050 and can be considered extremely valuable in terms of circularity. Reusable packaging reduces material use and tackles the plastic soup problem as it prevents environmental leakage. Furthermore, it can be combined with different paths, such as bioplastic. Nonetheless, as highlighted, the reuse of plastic packaging is challenging due to limited cleaning capabilities.

A lack of knowledge on the topic is apparent among the value chain. Therefore, policies should primarily focus on developing the desirable know-how for implementing the path in the sector. Implementation could be achieved by promoting and funding experimentation so that solutions could be developed. Moreover, policies should highlight the advantages of reusability to plastic procurers and reward innovative solutions for utilizing any plastic producers' losses in the transition. Finally, educating consumers will play a significant role in the acceleration of the path. Policies should orient themselves toward precisely informing consumers about the advantages of reusability so that the concept maintains its original value and products are not frequently disposed of.



## 7. DISCUSSION

Using the MIS framework and identifying the barriers and drivers of the four paths, this master's thesis attempted to provide more insights into the transition to a CE for flexible plastic packaging and better comprehend the paths and their interconnections. Furthermore, assessing societal challenges using such a framework aligns with the spirit of the Dutch Ministry of Economic Affairs and Climate by supporting the development of mission-driven innovation policies for tackling such socio-technical matters.

As a result, while the mission of circular flexible plastic packaging has gained ground in the circular agenda, insufficient actions are occurring to break down the old system and divert actors from their bad habits. Therefore, the mission is mostly driven by ambitious commitments rather than tangible actions. MR seems to be the most popular solution, driven by high experimentation, strong prioritization in the mission's agenda, and established support and advocacy, while a low reallocation of resources, the existence of negative discourse, and a lack of infrastructure for certain plastics are hampering further acceleration of the path. Bioplastics follow, led by high experimentation and development and the commercialization of such products. However, a negative reputation and low advocacy inhibit the further development of the path. The experimentation among waste suppliers, the high expectations of the value chain, and coalitions have stimulated the acceleration of CR. Nevertheless, the path is not estimated to be fully scalable for the next five years, while there is still a misconception regarding the exact definition of the path. Reusables are generally underperforming. Even though the value chain has identified the value of reusables and numerous actors support their extensive implementation, the desirable know-how is missing at the moment to transform those commitments into actions.

The paths' interrelationships also reinforce the identified drivers and barriers. CR appears to complement MR at present since the acceleration of the latter stimulates the development of the former. However, the two paths may also develop a competing relationship concerning resources and attention in the future, with critical consequences for the mission. Bioplastics also have a dual relationship with MR. First, the two paths complement each other because a high-quality recyclate requires the proper disposal of bio-based and biodegradable plastic packaging. Yet, they also have a competing relationship. Many plastic producers claim circularity by incorporating bioplastics into their portfolios instead of fully recyclable products due to the advantages of the materials' functional properties or cost and time efficiency. Finally, MR also has a competing relationship with reusables. Recyclability has captured most of the attention and resources in the mission, with the total value chain associating itself with the path in one way or another and neglecting reusability, despite its equal significance.

### 7.1. Limitations and Further Research

This research systematically assesses the flexible plastic packaging domain based on a thorough literature review from 2015–2021. To better understand the drivers and barriers of the paths, future research should focus on interviewing the relevant actors within the value chain. Interviews with waste suppliers, PROs, recyclers, and converters could assist in obtaining deeper explanations of each path and gain insights from different perspectives in the value chain. Furthermore, including end-consumers in future research would be of great consequence. Insights into consumers' behaviors and their operations regarding the topic could be gathered with questionnaires distributed to several customer clusters. In this way,





more efficient and concrete policy development could take place and further accelerate the transition to a CE in the flexible plastic packaging domain.

In missions, social problems and innovative solutions interact; this increases the complexity of a structural-functional analysis compared to a conventional one TIS. Therefore, in order to maintain the overview and feasibility, some aspects may lose their level of detail (Wesseling & Meijerhof, n.d.). Furthermore, the MIS framework is relatively new, and the indicators used in this research need to be further improved and specified for this framework in particular. In addition, more empirical cases are necessary to better solidify an appropriate set of indicators specifically for MIS. In the analysis, the blind coding was conducted by one individual. However, to ensure the objectivity and validity of the result, the database was reviewed three times. Moreover, the analysis does not include any literature written in Dutch, despite the specificity of the scope (the NL).



## 8. CONCLUSION

This master's thesis aimed to investigate the transition to a CE in the Dutch flexible plastic packaging sector by identifying the main drivers and barriers to that transition. The MIS framework was applied, a relatively new framework that seeks to comprehend and intervene in the dynamics associated with solving a mission (Hekkert et al., 2020). Secondary data were used for the problem-solution diagnosis and the structural analysis. The NL Plastic Pact document identified the four paths (MR, CR, bioplastics, reusables) as the most appropriate solutions, while a literature review revealed four actor categories: waste suppliers, producers responsibility organizations, recyclers and converters, and third parties. A historical event analysis was conducted to assess the functionality of the paths and identify the drivers and barriers within the mission.

The majority of events indicated that most actions and commitments aim to build up a new system rather than break down the old one. While the CE transition is underway, several barriers regarding the paths are hampering that transition. In particular, for MR, the lack of infrastructure for certain plastic materials, the low numbers of actually recyclable products in the market, and some confusing aspects in the regulatory framework regarding the use of RC are disrupting further development of the path. For CR, misconceptions about the exact definition of the path and what it entails, and the expectation that it will be commercialized after five years, constitute the principal barriers within the analysis. The development of bioplastics within the mission is negatively affected by the complex and unclear regulatory framework in terms of product design requirements and the recovery of bioplastics, which results in misunderstandings and confusion for several actors regarding the disposal of such products. Finally, the reusable path's main barriers are low experimentation and a lack of know-how in developing reusable plastic packaging. As a result, there is weak market creation for these products, while insufficient actors are reallocating their resources to develop this path. Simultaneously, those barriers are also being reinforced by the competing interconnections among the paths, such as MR with bioplastics and reusables, and the potential for a competing relationship with CR in the future. Such insights can contribute to the extension of knowledge regarding the development of the paths, their interconnections, and the transition in general, while constituting a solid basis for further research and the improvement of policy development to achieve a CE in the flexible plastic packaging industry.



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## 10. APPENDICES

### 10.1. Protocol for research involving human subjects.

**Faculty of Geosciences Department of Sustainable Development and Department of Human Geography and Spatial Planning**

**July 1, 2020**

General Framework

This protocol is based on the UU protocol 'Principles regarding experimental research with human test subjects'. It applies to research categories A (1.5 metres distance guaranteed), B (1.5 metres distance not guaranteed, no human contact) and C (physical contact unavoidable). Several measures are described in the UU protocol. The details are presented below.

Details

Logistics

This protocol serves as a guideline for starting research involving human subjects that takes place off campus/on location during national Corona measures. By *on-site research involving human subjects*, we mean surveys and interviews for which limited direct contact with respondents is necessary as well as group interviews and small-sized workshops (of up to 30 people). This protocol deals with a number of practical aspects relating to safety and hygiene that need to be taken into account when starting on-site research involving human subjects.

Principles / Basic ideas

1. On-site research involving human subjects can be initiated as long as the protocol is then followed.
2. The measures stipulated by the government as well as the RIVM guidelines have been taken as the starting point.
3. On-site work is carried out only on a voluntary basis, and this applies to both the researcher and the participant.
4. On-site research involving human subjects may not be carried out if one of the people involved has cold symptoms, lives with people with Corona-related complaints or belongs to one of the high-risk groups or has been notified by GGD that they have been in contact with a person with a Corona infection.
5. If, while carrying out the on-site research, a researcher develops complaints such as mentioned in section 2 or receives a notification about contact with an infected person, the researcher needs to go home immediately and must report this as soon as possible to the relevant supervisor as well as to the respondents or participants.
6. If, during the on-site research, a respondent or participant develops complaints or receives notification of contact with an infected person, the researcher needs to go home immediately and must report this as soon as possible to the relevant supervisor.



7. The researcher must keep a 1.5 metre distance from the respondents or participants at all times. The participants must also keep a 1.5 metre distance from each other, unless they live in the same household and/or are children under the age of 12.
8. If several respondents or participants are present on the site, it must be warranted that they can maintain the Corona safety and distance measures appropriate to their age group. The meeting room should also be easy to ventilate.
9. If respondents are the responsibility of a company, government agency or social organisation, then the guidelines of the organisation in question are leading, and the researcher must comply with these guidelines.
10. Researchers must keep a 1.5 metre distance from each other, unless proximity/contact is necessary for the research involved. In such cases, personal protective equipment such as face masks and gloves should be used. The faculty will provide all personal protective equipment necessary to enable the on-site research involving human subjects. The measures necessary for each research category (A, B and C) are described in greater detail in the general protocol for research involving human subjects.
11. These guidelines apply to research in the Netherlands and abroad, taking into account national and international agreements regarding travel and residence. Research abroad is possible, provided the Ministry of Foreign Affairs has not given negative travel advice (code orange or red) and the country concerned has itself not announced any travel restrictions.
12. For research involving human subjects that takes place in the Netherlands, the explicit consent of the supervisor is not required. If such research takes place abroad, the explicit consent (oral or written) of the direct supervisor is necessary, also with a view to safety and insurance.

*Contact with respondents and participants of workshops.*

The measures in the UU protocol for category C research apply when in contact with respondents.

More specifically:

Do not shake hands.

Sneeze and cough in the crook of your elbow.

Researchers must wash their hands properly for at least 20 seconds before and after each contact with a respondent. Suitable hand washing equipment is required on-site (i.e. disinfectants must be available).

If respondents or participants need to work with test material or questionnaires, they must wash their hands properly for at least 20 seconds before the start of the test or interview and also after the study has ended. This should also be done after the material is handed in to the researcher by the participants.

Transport

Preferably, the researcher uses his own transport to travel to the research location. If possible, public transport should not be used. However, if it is unavoidable and public transport is used, the researcher must comply with the applicable national regulations regarding travel on public transport in times of Corona.

Correspondence with respondents/participants



Prior to on-site research, respondents and/or participants will be contacted by telephone or email to explain the Corona-related precautionary measures during the research, as well as to discuss any arrangements and requests from the institution where the respondents or participants work. If desired, the 'Protocol on on-site research involving human subjects' will be sent.

*Stay home rules for researcher, respondent and participant.*

If the researcher, respondent or participant has one or more of the following (respiratory) complaints, the on-site survey cannot be carried out.

- Rhinitis, or the common cold.
- Coughing.
- Difficulty breathing/shortness of breath.
- A fever higher than 38 °C.
- If a researcher, respondent or participant has tested positive for Corona, they should stay home for at least 14 days. They may then only be involved in the research again if they are free of complaints after these 14 days.
- If someone in the household of the researcher, respondent or participant has a fever of more than 38 °C and/or shortness of breath, this researcher, respondent or participant should also stay at home.

It needs to be checked whether the respondents/participants have complied with these requirements, both when arranging the research and at the start of it.



## 10.2. Database

General details										MS functions														
Year	Month	Date	Event description (text, summary, website, etc.)	Event Type	Source	Actors	Type of organization (New entrant, incumbent, government or knowledge institute)	Pathways	Build up new system	Break down old system	F1: Entrepreneurial Activities	F2: Knowledge Development	F3: Knowledge Diffusion	F4: Problem directionality	F4: Solution directionality	F5: Market Formation	F6: Resources financial	F6: Resources (human)	F6: Resources (material)	F7: Creation of legitimacy	F8: Coordination	OTHER (uncertain)		
2015	Jan	1	The Dutch Environmental Act (Omgevingswet) was adopted by parliament on 1 July 2015 and is expected to enter into force in 2018.	Circular initiative	<a href="https://uk-arrestation.com/newscontenters.com/1-615-6750?transitionType=Default&amp;contextData={sc:Default&amp;firstPage=true}">https://uk-arrestation.com/newscontenters.com/1-615-6750?transitionType=Default&amp;contextData={sc:Default&amp;firstPage=true}</a>	Producer Responsibility Organizations	EU parliament, Dutch Government	General	1															
			In 2015, the Netherlands was one of the 193 members of the UN to adopt the 2030 agenda for sustainable development, operationalised in terms of the 17 SDGs.	Participation	<a href="https://www.sdnederland.nl/wp-content/uploads/2019/06/SDG-Dutch-context-2019-web.pdf">https://www.sdnederland.nl/wp-content/uploads/2019/06/SDG-Dutch-context-2019-web.pdf</a>	Producer Responsibility Organizations	Dutch Government	General	1												[+1]			
2015	Jan	1	The Amsterdam Economic Board has initiated a circular economy programme in January 2015	Circular initiative	<a href="https://amsterdameconomicboard.com/en/initiatives/transition-towards-a-circular-economy">https://amsterdameconomicboard.com/en/initiatives/transition-towards-a-circular-economy</a>	Producer Responsibility Organizations	Amsterdam Economic Board	General	1						[+1]									
			The programme is in close cooperation with the Amsterdam Metropolitan Area governments, business, knowledge institutes and citizens	Participation	<a href="https://amsterdameconomicboard.com/en/initiatives/transition-towards-a-circular-economy">https://amsterdameconomicboard.com/en/initiatives/transition-towards-a-circular-economy</a>	Producer Responsibility Organizations	Amsterdam Metropolitan Area governments, business, knowledge institutes and citizens	General	1														[+1]	
2015	Jan	1	The introduction of PMD, the combined collection of plastic packaging, metal packaging and drink cartons in the Dutch recycling system.	New circular programme	<a href="https://www.waastemmers.eu/news/plastic-recycling-leap-in-quality-needed/">https://www.waastemmers.eu/news/plastic-recycling-leap-in-quality-needed/</a>	Recyclers		MR		1													[+1]	
2015	Jan	14	Netherlands-based plastics recycling firm QCP has selected technology providers for the first phase of its 100,000-metric ton capacity plant to be built at the Chemelot campus in the Netherlands	New plant	<a href="https://www.recyclingtoday.com/article/qcp-netherlands-plastic-recycling/">https://www.recyclingtoday.com/article/qcp-netherlands-plastic-recycling/</a>	Recyclers	New entrants	MR		1													[+1]	
2015	Feb	11	Supermarket chain PLUS is introducing fruit containers that are no longer provided with a lid, but with foil	New initiative	<a href="https://kdy.nl/zacht-fruit-van-plus-in-nieuwe-verpakking">https://kdy.nl/zacht-fruit-van-plus-in-nieuwe-verpakking</a>	Waste supplier	Retailer	R		1					[+1]									
			Together with fruit and vegetable supplier The Greenery, PLUS investigated how less plastic can be used for thermoformed plastic trays	Partnership	<a href="https://kdy.nl/zacht-fruit-van-plus-in-nieuwe-verpakking">https://kdy.nl/zacht-fruit-van-plus-in-nieuwe-verpakking</a>	Waste supplier	Retailer	R		1						[+1]								
			As a result, PLUS introduces for the soft fruit containers with a resealable foil, which replaces the plastic lid	New initiative	<a href="https://kdy.nl/zacht-fruit-van-plus-in-nieuwe-verpakking">https://kdy.nl/zacht-fruit-van-plus-in-nieuwe-verpakking</a>	Waste supplier	Retailer	R		1													[+1]	
2015	Mar	19	A new series of masterbatches for polylactic acid (PLA) bioplastic was announced today by Teknor Apex Company.	New project	(March 19, 2015 Thursday). In Alliance with Takemoto, Teknor Apex Develops Masterbatches That Boost HDT and Impact and Cut Cycles for PLA Biopolymers. Product News Network. <a href="https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFJB-6P51-DYTB-TOCB-0000-00&amp;context=1516831">https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFJB-6P51-DYTB-TOCB-0000-00&amp;context=1516831</a>	Waste supplier	Plastic Producer, Incumbent	Bioplastic		1				[+1]										
			The project is in alliance with Takemoto and NatureWorks	New project	(March 19, 2015 Thursday). In Alliance with Takemoto, Teknor Apex Develops Masterbatches That Boost HDT and Impact and Cut Cycles for PLA Biopolymers. Product News Network. <a href="https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFJB-6P51-DYTB-TOCB-0000-00&amp;context=1516831">https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFJB-6P51-DYTB-TOCB-0000-00&amp;context=1516831</a>	Waste supplier	Plastic Producer, Incumbent	Bioplastic		1													[+1]	
2015	Mar	29	Cellulac, the biochemical company has signed a five-year partnership deal with Pharmalifter.	Deals between industries	(March 29, 2015). Cellulac signs partnership deal worth EUR 35 million. Sunday Business Post. <a href="https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFMM-C881-FOBB-SOTM-0000-00&amp;context=1516831">https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFMM-C881-FOBB-SOTM-0000-00&amp;context=1516831</a>	Waste supplier	Plastic producer, New entrant	Bioplastic		1				[+1]										
			Cellulac will supply Pharmalifter with biodegradable plastics made from dairy and agricultural feedstocks which it can use in turn to make disposable products to be used in hospitals	Deals between industries	(March 29, 2015). Cellulac signs partnership deal worth EUR 35 million. Sunday Business Post. <a href="https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFMM-C881-FOBB-SOTM-0000-00&amp;context=1516831">https://advance-lexis.com.proxy.library.uu.nl/api/document?collection=news&amp;id=urn:contentitem:SFMM-C881-FOBB-SOTM-0000-00&amp;context=1516831</a>	Waste supplier	Plastic producer, New entrant	Bioplastic		1													[+1]	











































































Year	Month	Day	Description	Category	Source	Actor	Role	Impact	Score	Other
2020	Dec		The KIDV has developed various Recycle Checks to help companies make their packaging recyclable.	Guidance	<a href="https://kivd.nl/nl/voor-entrepreneurs">https://kivd.nl/nl/voor-entrepreneurs</a>	Producer Responsibility Organizations	KIDV	MR	1	(+) 1
			The KIDV Recycle Checks are based on the current system of collection, sorting and recycling of packaging in the Netherlands, based on the average situation throughout the country.	Guidance	<a href="https://kivd.nl/nl/voor-entrepreneurs">https://kivd.nl/nl/voor-entrepreneurs</a>	Producer Responsibility Organizations	KIDV	MR	1	-1
			For some subjects there is a need for more knowledge and insight.	Guidance	<a href="https://kivd.nl/nl/voor-entrepreneurs">https://kivd.nl/nl/voor-entrepreneurs</a>	Producer Responsibility Organizations	KIDV	MR	1	-1
2021	Jan	8	From February 2021, FrieslandCampina will be making PET bottles from 100% recycled PET (rPET).	Leading Organization	<a href="https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles">https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles</a>	Waste supplier	Retailer, Incumbent	MR	1	(+) 1
			A PET bottle can only be recycled if the consumer has removed the label.	Knowledge sharing	<a href="https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles">https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles</a>	Recycler	MR	1	(+) 1	
			FrieslandCampina's Research & Development department has also developed a new "paper planet" that makes it easier to separate from the bottle.	New	<a href="https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles">https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles</a>	Waste supplier	Retailer, Incumbent	MR	1	(+) 1
			This makes FrieslandCampina the first company in the dairy sector to make its bottles virtually circular for its brands in the Netherlands, Belgium, the UK and Hungary.	Leading Organization	<a href="https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles">https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles</a>	Waste supplier	Retailer, Incumbent	MR, RC	1	(+) 1
			One of the objectives of FrieslandCampina's sustainability program "Nourishing a better planet" is to make the entire packaging portfolio fully circular and carbon neutral and to reduce the amount of packaging materials to a minimum as well.	Goals/Targets	<a href="https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles">https://www.frieslandcampina.com/press-releases/2021/01/08/frieslandcampina-100-recycled-pet-bottles</a>	Waste supplier	Retailer, Incumbent	MR, RC	1	(+) 1
2021	Jan	13	ICIS global team of Recycling Editors and Analysts capture all the major developments across the recycling and sustainability areas, delivering news and insights to help companies keep up to date with the latest information on brand pledges, regulation and legislation, price developments, and news on new or existing recycling projects, both chemical and mechanical.	Knowledge sharing	<a href="https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news">https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news</a>	Recycler	Global team of Recycling Editors and Analysts	MR	1	(+) 1
			EU-funded project aims to depolymerise MMA and chemically recycle	Financing	<a href="https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news">https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news</a>	Recycler		CR	1	(+) 1
			Plan to build a new plant in The Netherlands for chemical recycling, run by Heihealth, a member company of the M&M&M project	New plant	<a href="https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news">https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news</a>	Recycler	New entrant	CR	1	(+) 1
			Currently only 10% of MMA is recycled	Knowledge sharing	<a href="https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news">https://www.icis.com/news/2021/01/13/circular-economy-icis-chemical-news</a>	Recycler	New entrant	CR	1	-1
2021	Jan	22	SABIC and Plastic Energy are set to commence construction on the first commercial unit to produce its flagship certified circular polymers	Partnership	<a href="https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit">https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit</a>	Recycler	Incumbent, New entrant	CR	1	(+) 1
			They will be part of the TRUCIRCLE portfolio, which is made from the upcycling of mixed and used plastic	Participation	<a href="https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit">https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit</a>	Recycler	Incumbent, New entrant	CR	1	(+) 1
			SABIC along with partner Plastic Energy is set to start the engineering and construction phase for the unit, this will be based in Geleen, the Netherlands	New plant	<a href="https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit">https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit</a>	Recycler	Incumbent, New entrant	CR	1	(+) 1
			and is expected to become operational in the second half of 2022	New plant	<a href="https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit">https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit</a>	Recycler	Incumbent, New entrant	CR	1	(+) 1
			The project will be realized under a 50:50 joint venture called SPEAC (SABIC Plastic Energy Advanced Recycling BV)	Financing	<a href="https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit">https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit</a>	Recycler	Incumbent, New entrant	CR	1	(+) 1
			It is being executed with a Top Sector Energy Subsidy from the Ministry of Economic Affairs in the Netherlands.	Participation	<a href="https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit">https://www.advancetech.com/news/2021/01/22/sabic-and-plastic-energy-to-start-building-plastic-recycling-unit</a>	Producer Responsibility Organizations	Dutch Ministry of Economic Affairs	CR	1	(+) 1
2021	Jan	23	OneCircle (formerly Lightweight Containers), the producer and sales organization of KeyKeg and Ulinking plastic kegs for beverages, announced a new partnership with Qualiflex Food Recycling, one of the largest processors of residual waste streams from the Food and beverage industry in Western Europe.	Partnership	<a href="https://www.onecircle.com/news/2021/01/23/onecircle-partnership-with-qualiflex">https://www.onecircle.com/news/2021/01/23/onecircle-partnership-with-qualiflex</a>	Recycler	MR	1	(+) 1	
			Today, already 80% of the recovered KeyKeg plastics are reused into new KeyKeg and are being forwarded to increasing the percentage further and to rapidly increase the number of collected kegs together with OneCircle in a fruitful partnership.	Partnership	<a href="https://www.onecircle.com/news/2021/01/23/onecircle-partnership-with-qualiflex">https://www.onecircle.com/news/2021/01/23/onecircle-partnership-with-qualiflex</a>	Recycler	Incumbent	MR	1	(+) 1







