



This project is co-funded by the European Union and the Republic of Turkey

Technical Assistance for Assessment of Türkiye's Potential on Transition to Circular Economy

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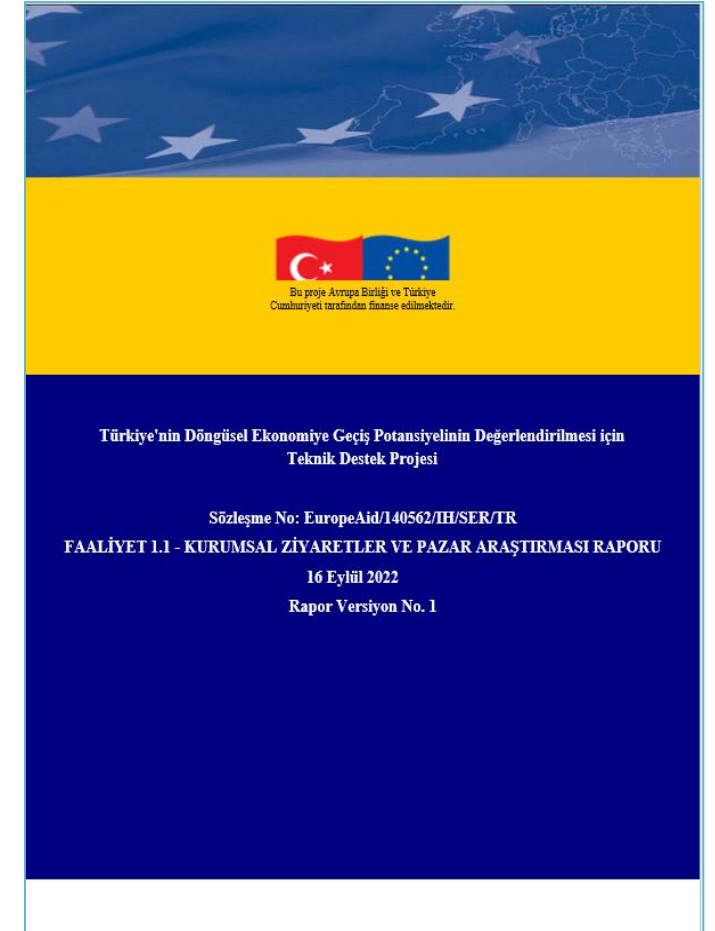
Results of Market Survey and Institutional Visits

Ferda Ulutaş İşevi – Senior Consultant, Business Council for Sustainable Development (BCSD) Türkiye (SKD)

Activity 1.2.2. Circular Economy Workshops,
6th of October 2022, Ankara, Türkiye

Content

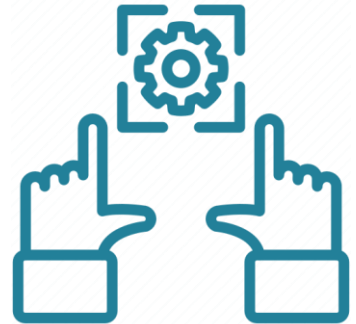
- Objective and scope
- Methodology and studies carried out
- Türkiye's circularity assessment studies
- Current situation assessment of stakeholders
 - Strategy and activities
 - Information and activities related to the EU Circular Economy Action Plan (EU CEAP)
 - Views on national policies
- Challenges and obstacles – Supporting elements
- Gaps, needs and solutions
- Benefits and opportunities
- Results



Objective and scope

Receiving stakeholder opinions and contributions to make a detailed evaluation to contribute to the benchmark studies of the EU Circular Economy Package in the context of Türkiye and other steps of the project

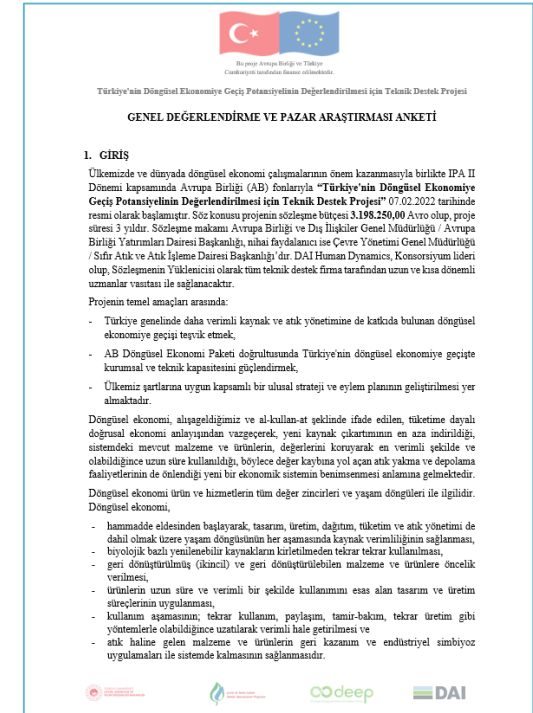
- Determining the current situation, contribution and needs of the stakeholders
- Receiving the opinions and suggestions of the stakeholders
- Providing the necessary data to calculate Türkiye's national and sectoral circularity
- Informing the stakeholders about the concept of circular economy and the Project
- Evaluation of cooperation opportunities



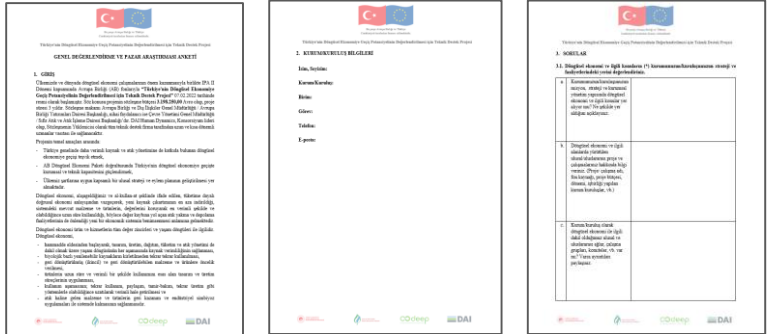
Methodology

Questionnaire and stakeholder visits

- Conducted Studies
- Generating general and specific questions (data request)
- Sending questionnaires to stakeholders
- Completion of visits
- Evaluation of results
- Following up the data request process with stakeholders



Conducted Studies

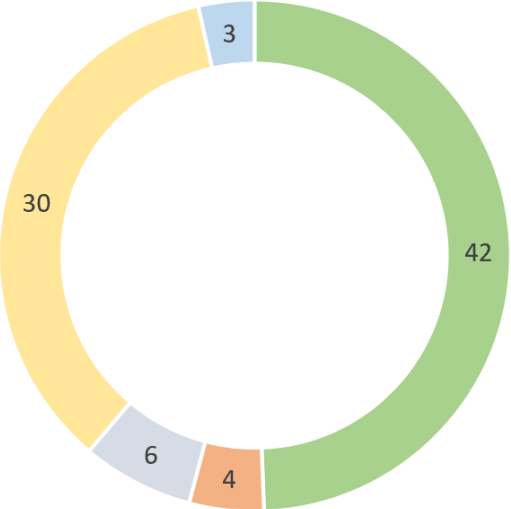


Creation of questionnaires

- The role of circular economy and related issues in the organization's strategy and activities (current and planned) (13 questions)
- Evaluations and studies of the institution/organization regarding the EU-CEAP published within the scope of the European Green Deal (2 questions)
- Evaluations of current policies and action plans regarding the circular economy in Türkiye (3 questions)
- Evaluations of the impact, needs and opportunities related to the transition to the circular economy (3 questions)
- Contributions they can provide within the scope of the project (data)
- Other issues, opinions and suggestions they want to express on the subject

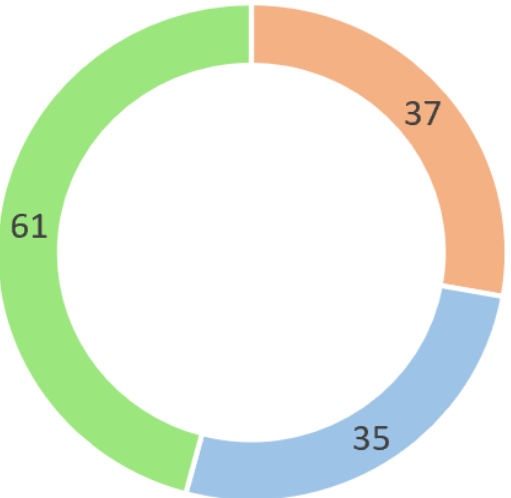
Conducted Studies

Completion of questionnaires and visits



- 85 institution/organization/unit visits (4 July – 22 August)

- Public Institutions
- International organizations
- Universities and research institutions
- Private sector representative institutions and organizations
- Other NGOs



- 133 surveys (63 visited) (1 July – 9 September)

- Public Institutions
- Other institutions and organizations
- Companies



Conducted Studies

Completion of questionnaires and visits

Public Institutions

- Ministry of Environment, Urbanization and Climate Change
- Ministry of Industry and Technology
- Ministry of Trade
- Ministry of Agriculture and Forestry
- Ministry of Energy and Natural Resources
- Ministry of Foreign Affairs
- Ministry of Treasury and Finance
- Turkish Presidency Strategy and Budget Department
- Turkish Presidency Investment Office
- Turkish Statistics Institution (TURKSTAT)
- Energy Market Regulatory Authority (EMRA)
- Public Procurement Authority (GCC)
- Small and Medium Business. Development and Support Administration (KOSGEB)
- Turkish Standards Institute (TSE)
- Turkish Energy, Nuclear and Mineral Research Agency (TENMAK)
- Turkish Environment Agency (TÜÇA)
- Directorate General of Mineral Research and Exploration (MTA)
- General Directorate of Mining and Petroleum Affairs (MAPEG)
- Union of Municipalities of Türkiye (TBB)
- Marmara Municipalities Union (MBB)
- Southeastern Anatolia Project Regional Development Administration

International Organizations

- Delegation of the European Union to Türkiye
- United Nations Development Program (UNDP)
- United Nations Industrial Development Organization UNIDO
- United Nations Food and Agriculture Organization (FAO)

Universities and Research Institutions

- Middle East Technical University – Department of Environmental Engineering
- Hacettepe University – Department of Civil Engineering
- Ankara University – Water Management Institute
- Boğaziçi University - Sustainable Development and Cleaner Production Center
- Marmara University – Environmental and Chemical Engineering Departments
- TUBITAK Marmara Research Center (MAM)

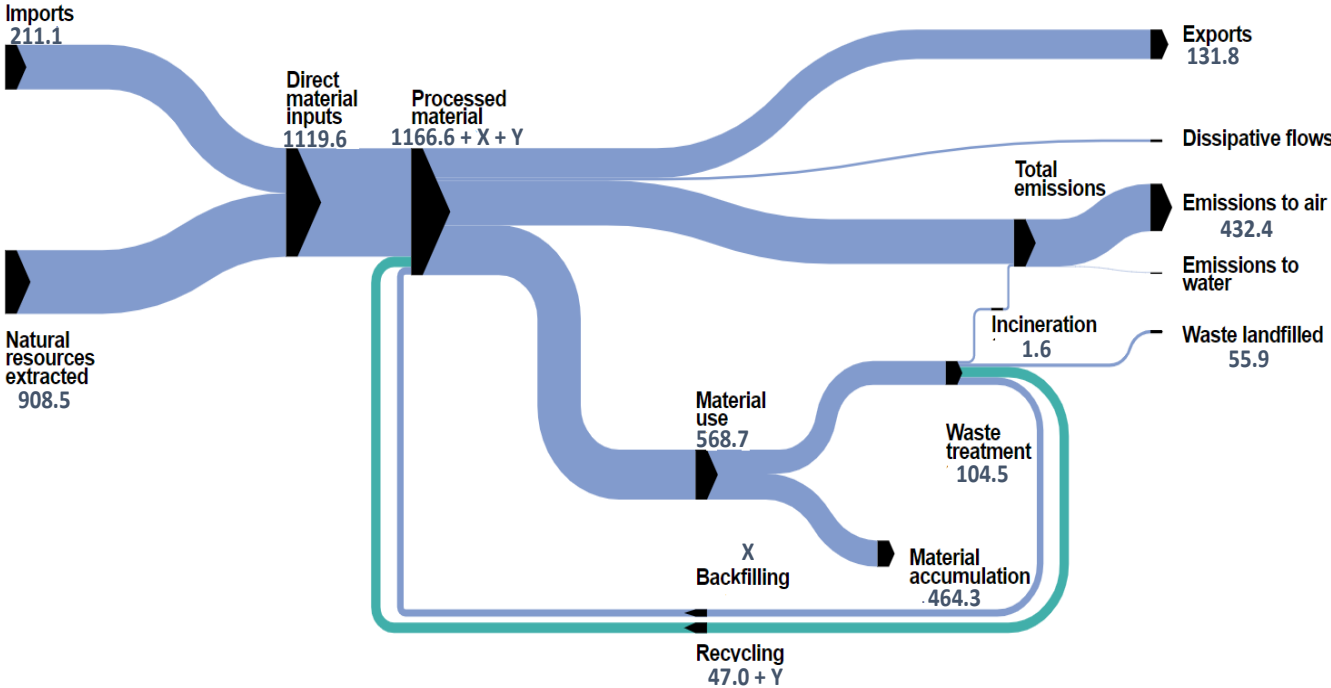
Private sector representative institutions/organizations:

- The Union of Chambers and Commodity Exchanges of Türkiye (TOBB)
 - Turkish Industry and Business Association (TÜSİAD)
 - İstanbul Chamber of Industry (İSO)
 - Business Council for Sustainable Development Türkiye (SKD Türkiye)
 - Turkish Enterprise and Business Confederation (TÜRKONFED)
 - Business for Goals (B4G)
 - Organized Industrial Zones Supreme Council (OSBÜK)
 - Turkish Cement Manufacturers' Association (Türk Çimento)
 - İstanbul Ready Made Garment and Apparel Exporters' Association (İHKİB)
 - Turkish Clothing Manufacturers Association (TGSD)
 - Federation of Food & Drink Industry Associations of Türkiye (TGDF)
 - Turkish Plastics Industry Foundation (PAGEV)
 - Turkish Packaging Manufacturers Association (ASD)
 - Automotive Manufacturers Association (OSD)
 - Turkish Contractors Association
 - Lighting Equipment Manufacturers Association (AGİD)
 - Tyre Industrialists Association (LASDER)
 - Turkish Oil Industry Association (PETDER)
 - Informatics Industry Association (TÜBİSAD)
 - Portable Battery Manufacturers and Importers Association (TAP)
 - Evaluable Waste Materials Industrialists Association (TÜDAM)
 - Recovery Industrialists Association (GEKSANDER)
 - Recycling and Recovery Industrialists Association (GEKADER)
 - Electrical and Electronics Recycling and Waste Management Association (ELDAY)
 - Accumulator and Recovery Industrialist Association (AKÜDER)
 - Accumulator Importers and Manufacturers Association (TÜMAKÜDER)
- Other NGO's
- Technology Development Foundation of Türkiye (TTGV)
 - Food Rescue Association,
 - Türkiye Clean Sea Association (TURMEPA)
- Organized Industrial Regions
- Dilovasi OIZ
 - Çorlu Leather Specialized and Mixed OIZ
 - Nilüfer OIZ
 - Kütahya 30 August OIZ

Circularity Assessment Studies

In line with the Eurostat circularity analysis methodology, studies are continuing to make circularity calculations for Türkiye. The methodology is based on the Material Flow Accounting (MFA) method.

- Sankey Diagram
- Circularity rate (circular material usage/total material usage)



Circularity Assessment Studies

The possible contributions of the relevant institutions were evaluated through questionnaires and visits.

- **TURKSTAT**
- Ministry of Environment, Urbanization and Climate Change
- Ministry of Trade
- Ministry of Industry and Technology
- Ministry of Energy and Natural Resources

- Material Flow Calculations (2010 – 2019)
- Waste disposal and recovery facility indicators (2018, 2020)
- Air emission calculations by economic activities (2018, 2019)

After the visits, detailed data requests were officially sent to the relevant institutions. National and sectoral analyzes will continue in line with the incoming data.

Maddesi akış hesapları, 2010 - 2019
Material flow accounts, 2010 - 2019 (BİN Ton - Thousand Tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Yurtiçi üretim										
Domestic extraction (DE)	889 752	934 396	817 640	823 478	874 122	907 813	919 235	964 079	968 534	813 356
Biyokütle	217 298	227 280	233 383	231 407	225 900	250 108	261 323	270 048	267 444	282 528
Biyomasa										
Metal cevherleri										
Metali oksit	33 905	38 123	37 358	48 466	52 315	59 103	50 522	44 863	35 274	51 137
Metalli olmayan mineraller	556 154	583 430	485 558	480 358	529 175	537 415	531 511	572 225	518 070	389 218
Fosil enerji maddeleri										
Fossil energy materials	62 386	85 863	81 341	85 157	87 272	60 387	75 879	76 943	87 146	90 473
İthalat										
Imports (İ)	147 987	157 851	172 910	173 876	157 189	197 391	207 008	225 873	211 051	216 289
Biyokütle	20 456	22 780	24 870	25 529	28 170	28 724	28 509	33 156	33 869	39 162
Biyomasa										
Metal cevherleri	44 700	47 980	51 033	53 533	55 544	55 840	55 094	55 014	56 367	51 881
Metali oksit										
Metalli olmayan mineraller	7 160	7 762	7 623	8 865	9 790	9 281	10 131	10 774	9 184	9 709
Non-metallic minerals										
Fosil enerji maddeleri	68 640	72 028	81 519	79 375	60 085	95 789	104 919	113 976	103 666	106 716
Fossil energy materials										
Diğer ürünler	7 024	7 420	6 966	7 450	7 600	7 696	7 695	8 447	7 935	8 780
Other products										
Diğer materyal input (DAR = DE + İ)	1 037 739	1 092 246	990 550	997 355	1 031 311	1 104 344	1 126 333	1 190 952	1 119 585	1 029 645
Diğer materyal input (DAR = DE + I)										
İthalat										
Imports (İ)	94 055	94 243	98 876	100 141	99 265	99 332	103 768	115 533	131 800	150 770
Biyokütle										
Biyomasa	12 793	12 643	13 089	14 649	15 163	15 366	17 848	19 830	23 865	23 755
Metal cevherleri										
Metali oksit	26 591	28 142	30 419	30 332	29 106	28 778	27 593	30 988	35 960	37 448
Metalli olmayan mineraller										
Non-metallic minerals	37 376	34 374	34 771	34 783	33 372	33 743	36 296	40 509	42 392	53 172
Fosil enerji maddeleri										
Fossil energy materials	8 495	9 324	10 524	9 722	10 255	11 072	11 141	11 802	13 791	19 422
Diğer ürünler	9 798	9 760	10 073	10 605	11 349	11 403	10 950	12 514	15 763	18 954
Other products										
Yurtiçi madde tüketimi										
Domestic material consumption (DMC) = (DM) + (I)	943 694	988 104	891 674	897 214	932 045	1 005 032	1 022 565	1 074 419	987 776	878 875

Akış bertaraf ve geri kazanım tesisi göstergeleri, 2018, 2020⁽¹⁾
Waste disposal and recovery facilities indicators, 2018, 2020⁽¹⁾

	2018	2020
Akış bertaraf ve geri kazanım tesisi sayısı	2 223	2 752
Number of waste disposal and recovery facilities		
Akış bertaraf tesisi sayısı	166	184
Number of waste disposal facilities		
Düzenli depolama tesisi - Controlled landfill site		
Sayısı - Number	158	174
Kapasite (m ³) - Capacity (m ³)	798 926 893	1 298 309 189
Kalan kapasite (m ³) - Rest of capacity (m ³)	474 284 089	661 189 005
Düzenli depolanan toplam atık miktarı (Ton)	55 878 883	77 762 423
Total amount of waste landfilled (Tonnes)		
Düzenli depolanan tehlikeli atık miktarı (Ton)	16 753 047	31 884 941
Amount of hazardous waste landfilled (Tonnes)		
Düzenli depolanan tehlikesiz atık miktarı (Ton)	39 125 836	45 877 482
Amount of non-hazardous waste landfilled (Tonnes)		
Yıkama tesisi - Incineration plant		
Sayısı - Number	7	10
Kapasite (Ton/yıl) - Capacity (Tonnes/year)	757 002	842 222
Yıkılan toplam atık miktarı (Ton)	493 885	570 980
Total amount of waste incinerated (Tonnes)		
Yıkılan tehlikeli atık miktarı (Ton)	64 567	c
Amount of hazardous waste incinerated (Tonnes)		
Yıkılan tehlikesiz atık miktarı (Ton)	429 319	c
Amount of non-hazardous waste incinerated (Tonnes)		
Akış geri kazanım tesisi sayısı	2 057	2 568
Number of waste recovery facilities		
Kompost tesisi - Composting plant		
Sayısı - Number	0	0
Kapasite (Ton/yıl) - Capacity (Tonnes/year)	482 800	651 150
Kompostlanan toplam atık miktarı (Ton)	138 054	127 065
Total amount of waste composted (Tonnes)		
Üretilen kompost miktarı (Ton)		

Sektörel faaliyetlere göre hava emisyon hesapları, 2018⁽¹⁾, 2019⁽²⁾
Air emission accounts by economic activity, 2018, 2019

Maddesi No - Activity - Sektör	Hava emisyon hesapları (t/yıl) - Air emissions (t/year)		Karbon dioksit (CO ₂) emisyonları (t/yıl) - Carbon dioxide (CO ₂) emissions (t/year)		Diğer emisyonlar (t/yıl) - Other emissions (t/year)		Toplam emisyonlar (t/yıl) - Total emissions (t/year)	
	2018	2019	2018	2019	2018	2019	2018	2019
Yüksek Enerji - High Energy	104 800 204	108 000 000	410 438 880	386 394 004	125 837	124 888	536 266 667	512 618 892
1. Termik santraller ve buhar türbinleri	98 800 200	102 000 000	360 000 000	330 000 000	80 000	80 000	360 800 000	330 080 000
2. Petrol rafinerileri ve petrokimya	6 000 000	6 000 000	50 000 000	50 000 000	45 837	44 888	56 037 837	54 088 888
3. Enerji	10 000 000	10 000 000	100 000 000	100 000 000	0	0	110 000 000	110 000 000
4. Çimento, çimento ürünleri ve diğer inşaat malzemeleri	100 000 000	100 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
5. Çelik	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
6. Diğer	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
Orta Enerji - Medium Energy	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
7. Çimento, çimento ürünleri ve diğer inşaat malzemeleri	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
8. Çelik	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
9. Diğer	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
Düşük Enerji - Low Energy	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
10. Diğer	10 000 000	10 000 000	100 000 000	100 000 000	0	0	200 000 000	200 000 000
Toplam - Total	124 800 204	128 000 000	610 438 880	586 394 004	125 837	124 888	761 266 667	732 618 892

Current situation assessment of stakeholders

	Public Institutions	Other institutions and organizations					Companies
		International	Research	Private sector rep.	Other NGOs	OIZ	
Strategy and activities (*)							
Information and activities related to the EU Circular Economy Action Plan (EU CEAP)							
Views on national policies							

(*) In addition, separate tables have been created for projects, networks and collaborations, publications and events, trainings, financial resources and incentives, and future plans.

Current situation assessment of stakeholders

Strategy and activities (Public Institutions)

- The concept of circular economy and related measures indicated in the Environmental Law, the climate change draft law, zero waste
- Sustainable, environmentally and socially sensitive industrial approach
- Conducted studies within the scope of harmonization with the European Green Deal
- Inclusion of sustainable environment and green economy in regional strategies
- Green OIZ studies
- Capacity building activities for SMEs
- Targets to increase water efficiency and prevent food waste
- Good and organic agriculture practices
- Evaluation of mining wastes and investigation of secondary raw material sources

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

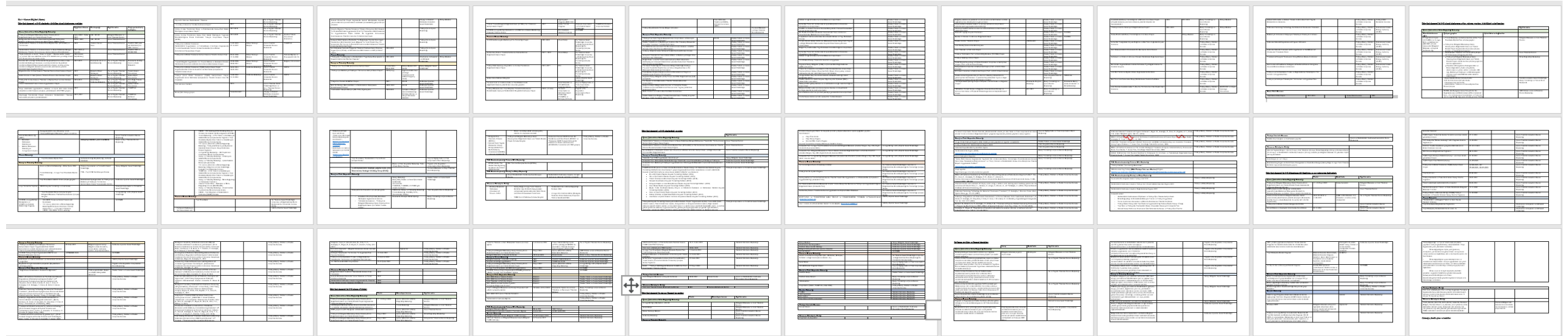
- ✓ Ministry of Environment, Urbanization and Climate Change
- ✓ Ministry of Trade
- ✓ Ministry of Industry and Technology
 - KOSGEB
- ✓ Ministry of Agriculture and Forestry
- ✓ Ministry of Energy and Natural Resources
 - MTA, MAPEG, TENMAK

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Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Projects, networks and collaborations, publications and events, trainings , financial resources and incentives, future plans (Public Institutions)



- 109 projects (including research projects)
- 44 working groups/networks/collaboration/connections
- 64 publications
- 47 events
- 32 trainings

Current situation assessment of stakeholders

Strategy and activities (Other Institutions)

- Studies carried out within the scope of harmonization with the European Green Deal
- EU Circular Economy Action Plan
- Waste management, recovery, recycling
- Industrial symbiosis
- Resource efficiency, fight against climate change
- Entrepreneurship, innovation
- Sustainable development goals
- Green transformation of SMEs
- Sustainable product requirements for the EU market
- Extended product responsibility
- Reducing marine litter
- Prevention of food waste

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

- ✓ Business Council for Sustainable Development Türkiye (Circular Economy Platform)
- ✓ TÜSİAD
- ✓ TURKONFED, B4G
- ✓ Sectoral associations (including the recovery sector)
- ✓ Authorized organizations
- ✓ Universities, TÜBİTAK MAM

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Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar				Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	
Strateji ve faaliyetler (*)						
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler						
Ulusal politikalara ilişkin görüşler						

Projects, networks and collaborations, publications and events, trainings, financial resources and incentives, future plans (Other Institutions)

- 131 project
- 92 working groups/networks/collaboration/connections

- 97 publications
- 91 events
- 40 trainings

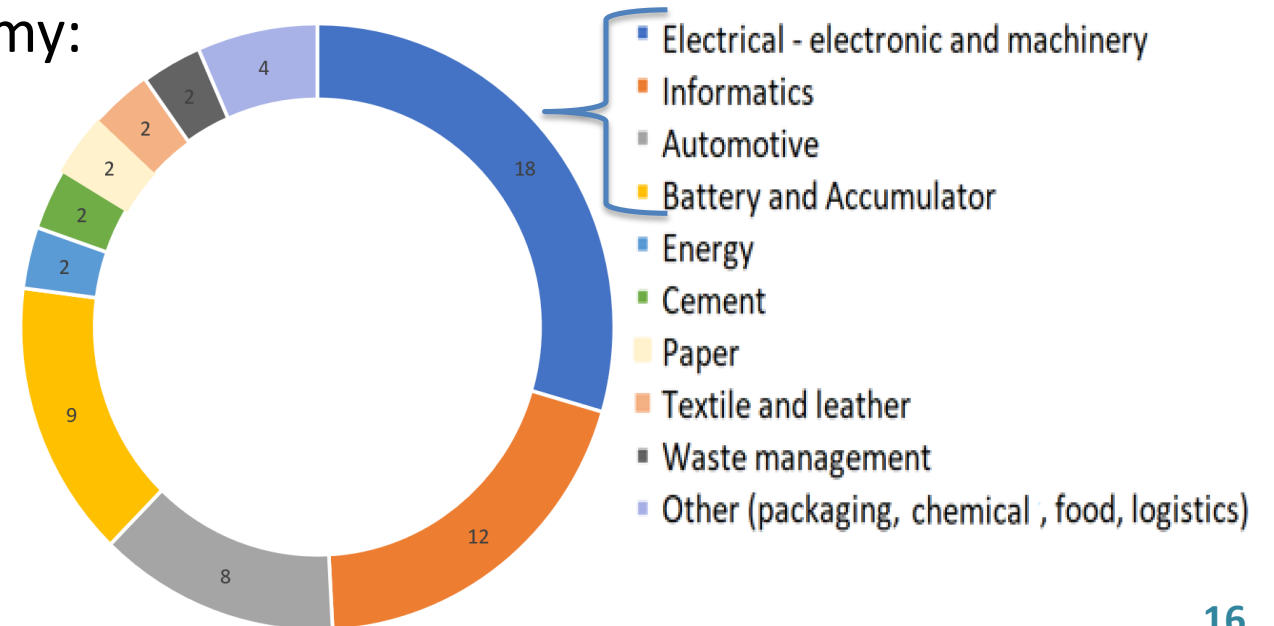
Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
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Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Strategy and activities (Companies – mostly SMEs)

- Need for information on circular economy, willingness to participate in relevant events
- Circular economy is not sufficiently addressed in companies' strategies
- Knowledge of the Green Deal and the net zero carbon target
- Current approaches to circular economy:

- Using bio-based materials as inputs in production
- Minimizing the use of hazardous chemicals



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Strategy and activities (Companies – mostly SMEs)

- Producing products from recycled materials and products that are recyclable
- Longevity of the products, repair, maintenance, renewal, tracking the products put on the market
- Collecting and recycling the products put on the market within the framework of extended producer responsibility
- Investigation of secondary usage areas after using the products
- The advantage of reducing the VAT rate to 1% in refurbished device sales

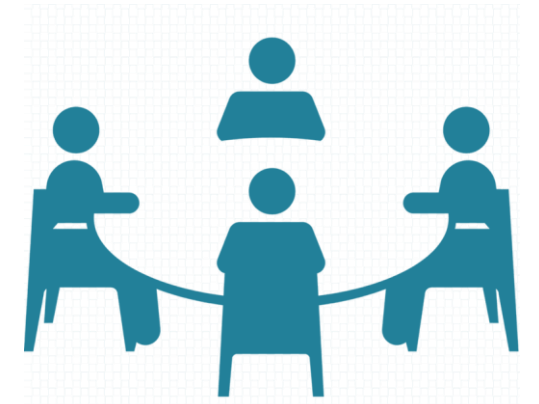


Current situation assessment of stakeholders

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		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Information and activities related to the EU Circular Economy Action Plan (EU CEAP) (Public institutions)

- Green Deal Action Plan studies and related working groups carried out under the coordination of the Ministry of Trade
- Preparation of the National Circular Economy Action Plan under the responsibility of the Ministry of Environment, Urbanization and Climate Change - Importance of Technical Assistance for Assessment of Turkey's Potential on Transition to Circular Economy Project.



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Information and activities related to the EU Circular Economy Action Plan (EU CEAP) (Public institutions)

- The topics covered are:
 - Sustainable product design, eco-design criteria,
 - Use of recycled content, limiting the use of hazardous chemicals,
 - Extended producer responsibility,
 - Digital product passport, environmental label,
 - Packaging, plastics, microplastics, deposit system,
 - Increasing producer responsibilities in the context of waste disposal,
 - Reuse of treated water,
 - Rapid completion of the harmonization process to maintain competitiveness



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Information and activities related to the EU Circular Economy Action Plan (EU CEAP) (Other institutions and organizations)

- Existence of the organizations that examine the plan in detail, follow the developments, make sectoral assessments and inform their members and stakeholders
- Special emphasis on Sustainable Product Initiative, Eco-Design Directive, Digital Product Passport and REACH
- The importance of evaluations specific to Türkiye
- The need for technical expertise, incentives and financial support for compliance



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Information and activities related to the EU Circular Economy Action Plan (EU CEAP) (Other institutions and organizations)

- Emphasis and views on actions by sectoral organizations on key value chains. Ex.:
 - Obligations to be brought by the revisions in the Construction Products Regulation and the related developments expected
 - Safe disposal of information and data in electronic waste
 - Making batteries more durable, repairable
 - Avoiding mixed/composite structures in packaging, etc.

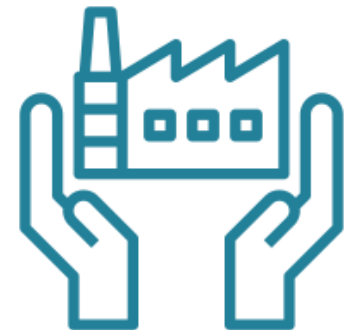


Current situation assessment of stakeholders

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Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Information and activities related to the EU Circular Economy Action Plan (EU CEAP) (Companies)

- Generally more focused on overall European Green Deal and carbon reduction targets
- In particular, SME-scale companies do not make a comprehensive assessment in terms of EU CEAP.
- Emphasis is placed on recycling, green and digital transformation, digital product passport, long-lasting product, green procurement and the importance of the value chain in relation to EU CEAP.



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Views on national policies (Public institutions)

- Relevant articles in the Environmental Law and the 11th Development Plan
- Approach to compliance with the Sustainable Development Goals
- Gains achieved with zero waste practices
- Increase in the use of alternative raw materials
- Goals related to supporting recycling investments, using treated water, preventing food loss and waste, etc.
- Green and Circular Economy Title within the scope of Turkey Green Deal Action Plan



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar				Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	
Strateji ve faaliyetler (*)						
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler						
Ulusal politikalara ilişkin görüşler						

Views on national policies (Public institutions)

- The necessity of a legal regulation at the level of law that will determine the basic principles and legal framework of the circular economy
- The necessity of a holistic document in the circular economy, in which all components are addressed in the same detail
- An action plan specific to our country will be prepared within the scope of Technical Assistance for Assessment of Turkey's Potential on Transition to Circular Economy Project
- Considering the EU CEAP, harmonization with the EU acquis should be accelerated.
- The importance of the financing dimension, the decrease in grant resources, models such as credit and guarantee mechanisms come to the fore, and these should also be evaluated for the circular economy.



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar				Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	
Strateji ve faaliyetler (*)						
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler						
Ulusal politikalara ilişkin görüşler						

Views on national policies (Other institutions and organizations)

- The use of recycled raw materials is not compulsory in many areas and is not sufficiently encouraged.
- Insufficient instruments to support waste reduction and prevention
- The criteria for recycling facilities need to be improved
- The necessity of removing the legislative barriers in front of industrial symbiosis practices
- Arrangement of facilitating technical, administrative and financial supporting elements, reducing the burden of documents and permits-licenses
- Municipalities play a more active role
- Supporting SMEs
- The need for legislative regulations on the import of recycled plastic raw materials



Current situation assessment of stakeholders

	Kamu Kurumları	Diğer Kurum ve Kuruluşlar					Firmalar
		Uluslararası	Araştırma	Özel sektör tem.	Diğer STK	OSB	
Strateji ve faaliyetler (*)							
AB Döngüsel Ekonomi Eylem Planı (AB DEEP) ile ilgili bilgi ve faaliyetler							
Ulusal politikalara ilişkin görüşler							

Views on national policies (Companies)

- Policies related to information and awareness raising are needed.
- Raising awareness, training, consultancy and mentoring systems are important for SMEs.
- In line with the legislation, it is necessary to take quick action for the developments of the predictions,
- If you can be a pioneer, not a follower, you can gain.
- The importance of addressing the effects of global changes and its impact on our country quickly and in accordance with the conditions of our country.



Challenges - Obstacles

- Incomplete legal structure
- Insufficient financing and incentives
- Insufficient public consciousness and awareness
- Current perspective on linear economy and conventional waste management by all parties, including the public
- Barriers to bureaucratic processes
- Lack of cooperation
- Difficulties experienced in public-private sector-university cooperation
- The current system is not suitable for the circular economy
- Difficulties in the transformation of production and consumption systems and changing habits and the need for a long time for transformation
- Failure to adopt new business models
- Failure of the industrialist to complete the innovation process
- Failure to create an effective separate collection system
- Inability to increase recycling capacity
- The dominance of the disposable model due to constraints in certain sectors (ex: hygiene in the medical field)
- The existing waste management costs of municipalities are high and not efficient.
- The lack of motivation of municipalities in this regard

Supporting Elements

- Resource efficiency becomes necessary due to the energy bottleneck and reduction in natural resources
- EU Green Deal and EU CEAP implications
- Culturally giving priority to issues such as reuse and recycling
- With the Zero Waste Project, public awareness, and sensitivity of the new generation to studies on recycling
- The works carried out on the public side and the infrastructure created so far
- Technical Assistance for Assessment of Türkiye's Potential on Transition to Circular Economy and the interest and cooperation of all parties in the project



Gaps, needs and solutions

Policy/ Legislation

- Revision of the legislative infrastructure according to circular economy principles
- An action plan for Türkiye in which the circular economy is handled holistically
-

Awareness / Capacity

- A clear understanding of the circular economy concept by all parties
- Detailed studies on the circular economy on academic and sectoral basis
-

Infrastructure/ Technology

- Use and dissemination of innovative techniques and technologies
- Adequate infrastructure for separation, collection, and recycling of waste at source
-

Financing/ Investment

- Financial instruments that support the transition to a circular economy
- Accelerating green transformation in OIZs and other industrial zones
-

Governance/ Cooperation

- Effectiveness of local governments in the implementation of circular economy policies
- Effective information sharing, cooperation and coordination between units and institutions
-

Results of Market Survey and Institutional Visits

Benefits and Opportunities

- Supporting sustainability and contributing to the achievement of the Sustainable Development Goals
- Achieving carbon reduction and supporting the fight against climate change
- Preventing environmental pollution, providing positive effects for the environment and human health
- Increasing resource efficiency, waste and resource management efficiency and sustainability
- Minimizing waste
- Reducing raw material costs and reducing price fluctuations
- Reducing reliance on natural resources
- Increasing economic growth
- Creation of new markets
- Creation of new economy and business models
- Reducing dependency on imports
- Increasing the competitiveness of industrialists in domestic and foreign markets
- Compliance with environmental conditions in the supply chain and trade
- Enabling companies to access national and international financial resources, incentives, loans, and grants
- Saving on waste storage areas
- Triggering innovation and R&D, developing new techniques and technologies
- Supporting sustainable product design and production processes
- Creation of new jobs and employment opportunities
- Strengthening cooperation, contribution of all stakeholders in the life cycle
- Changing consumer awareness and habits



Results

- As one of the important activities of the project, market research and institutional visits were completed efficiently and the determined targets were realized.
- An important information and base has been created for many project activities, including the circularity analysis, by taking the opinions of stakeholders from different segments.
- It has been seen that the stakeholders are partially interested in the subject and its details, and a comprehensive information and awareness-raising process is necessary, especially from the point of view of SMEs.
- All stakeholders especially focus on Türkiye's rapid adaptation to the legislation and practices within the scope of EU CEAP to avoid loss of competitiveness and avoid obstacles in exports.
- For this, it is critical to go beyond the linear economy and traditional waste/waste management understanding and to deal with all aspects of the circular economy.



Results

- In this framework, a descriptive legal regulation specific to the circular economy and a comprehensive action plan specific to our country should be prepared.
- In addition to the regulation of policy and legislation, there are many steps that need to be taken within the framework of creating awareness and capacity, infrastructure and technology, financing and investment, governance and cooperation.
- It is seen that Technical Assistance for Assessment of Turkey's Potential on Transition to Circular Economy is an important start and opportunity for all the steps to be taken.
- It is noteworthy that the stakeholders are highly interested in the project and they want to be involved and contribute to the process.





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Thank you for your attention.



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