To Cycle or not to Cycle
Towards a circular economy in Turkey

Commissioned by the ministry of Economic Affairs and Climate Policy
TO CYCLE OR NOT TO CYCLE

TOWARDS A CIRCULAR ECONOMY IN TURKEY
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LITERATURE
In 2016 the Business Council for Sustainable Development Turkey (BCSD Turkey) and the European Bank for Reconstruction and Development (EBRD) introduced the concept of a circular economy in Turkey. They want to change the current economic system because raw materials are becoming scarce and the depletion of natural resources has a negative impact on the environment. The manufacturing industry needs to develop new methods to use the resources which are already within the economy. That is why they approached different Turkish ministries to make the circular economy transition priority. As a result, the topic is currently on the agenda of the Ministry of Environment and Urbanisation.

In a circular economy waste does not exist and all products are made to be remade. That is why the Turkish government started with focusing on waste management, but the plan is gradually shifting to cover the full economic cycle now. The European Union also had this turning point when they realized the scale of the problem. They switched from a plan focusing on waste management to the current Circular Economy Action Plan, which was adopted in 2015. The production of biogas from organic waste is for example increasing in Turkey. This is resulting in better waste management, but also contributes to the goal of the Ministry of Energy and Natural Resources to increase local and green energy production. As in this example, most circular initiatives require the involvement of multiple stakeholders who work together.

Most Turkish small and medium-sized enterprises do not want to take risks and trust their traditional way of manufacturing. Some companies are even afraid they will lose reputation if they use secondary raw materials, because their products will be considered second hand. That is why the government can be more encouraging for the private sector and help increase the public awareness about this topic. Turkey Materials Marketplace is for example facilitating the circulation of industrial waste as a secondary raw material and is showing that companies are willing to change when some incentive is provided. Arçelik and Şişecam on the other hand, respectively Turkey’s biggest electronics and glass producers have already adapted circular initiatives voluntarily. Realizing the economic advantages of circularity, they wanted to keep their leading position. Similar to Dutch circularity giants such as Philips and Unilever.

Currently the Netherlands has the ambitious goal to become completely circular by 2050 and different circular initiatives and business models are being developed nationwide. Because this concept is also upcoming in Turkey, we see a huge potential for bilateral collaboration. The agricultural and textile sector seem most promising for circular approaches at the moment. Collaboration possibilities in the field of circular agriculture are already being discussed between the ministries of agriculture. There are also some projects ongoing about sustainable fashion, but we would like to organize a more extensive partners for international business (PIB) program about circular textile between Turkey and the Netherlands. Additionally, at the end of 2019 a Year of Research and Innovation (YORI) will start between the two countries and the circular economy is also on the agenda. The aim of this bilateral collaboration is to jointly advance in science and belong to the frontrunners in the pioneering field of circular economy.
Such as most emerging world economies, Turkey has gone through a period of serious urbanization and population growth. Currently more than 92% of the population is living in cities and only Istanbul is already housing 18% of the population. In combination with the increasing consumption, these densely populated urban areas are producing large amounts of waste. All of this waste has been landfilled for a long time and littering is still a widespread habit in the country. In 2016, Turkey was amongst the countries polluting the Mediterranean Sea the most and in the same year, the amount of recycled municipal solid waste was less than 10%. The main reasons for this are the lack of sufficient waste separation facilities in municipalities and the public being relatively unfamiliar with the environmental impact of waste. The only contributors to recycling have been unregistered garbage pickers. They scavenge the streets with their big white carts and collect plastic and cardboard for recycling companies to earn some money. However, the waste management system is changing now.

In 2017 first lady Emine Erdoğan launched a Zero Waste Project in collaboration with the Ministry of Environment and Urbanisation in order to stop resources from ending in landfill and increase public awareness about waste management. In line with the vision of this project, most circular initiatives in Turkey are currently based on the utilization of waste. Some Turkish recycling companies are even importing waste for recycling. However, according to the principles of a circular economy it would be best to eliminate waste already at the level of product design. In contrast to the current take, make and waste linear economy, in a circular economy products are made to be remade.

In collaboration with the Business Council for Sustainable Development Turkey (BCSD Turkey), we organized a Circular Design Workshop provided by CIRCO at the end of 2018. The participants were around 20 representatives from the biggest Turkish companies and shared their thoughts about circularity in a survey after the workshop.

The results showed that most participants had theoretical knowledge about the principles of a circular economy, but did not know enough about the practical approaches for implementation within their own company. Additionally, it became clear that the participants were not connected to the relevant (inter)network in the field of circularity for collaboration. That is why we decided to continue with organizing these CIRCO workshops to help Turkish companies to create business models through circular design.

In addition to these activities, we prepared this report sketching the current status of the circular economy in Turkey. We mainly gathered this information via internet research and during interviews with the relevant stakeholders. Firstly, we describe the principles of the circular economy and this is followed by the recent developments in the field of circular economy in Turkey. We finish with discussing the possible sectors for bilateral collaboration and knowledge exchange between Turkey and the Netherlands. We strongly believe that we can have a strategic alliance in the field of circular economy to benefit from its economic advantage and to attain the (inter)national environment goals.
LINEAR ECONOMY VS. CIRCULAR ECONOMY

The extraction of raw materials from nature is increasing. This results in many environmental problems such as the impacts of climate change. The weather conditions are becoming more and more extreme and this is complicating agriculture and threatening biodiversity.

The traditional linear economy does not take this into account and assumes resources are unlimited. That is why most of the manufacturing industry has based their business models on the unrealistic model of take, make and waste. Eventually, this linear system will exploit nature and we will not be able to rely on its raw materials anymore. That will cause drastic geopolitical problems. We should avoid that scenario by leaving the linear economy behind.

The circular economy is the direction society must steer for proper resource management. This model makes companies less dependent on limited raw materials by extracting more value from resources which are already
The circular economy makes companies less dependent on limited raw materials by extracting more value from resources which are already within the economy. Within the economy and counters the resource problems which will originate in the future. Two schools of thought that have contributed to the circular framework are Biomimicry and Cradle to Cradle. Biomimicry is about using nature as a source of inspiration for innovation. In nature, waste always equals food. In other words, the waste of one becomes the food of the other, making a dynamic system with limited resources (except solar energy) possible. Cradle to Cradle emphasizes this phenomenon. Based on this, a circular economy is mainly striving to supply production chains with secondary raw materials obtained from waste streams and is aiming for maximum resource efficiency. The circulation of linear production chains into another process is called closing the loop. As a result, materials which usually end up being landfilled are kept within the economy. In this way, the circular economy is stimulating sustainable economic growth decoupled from the extraction of raw materials from nature. The Circular Economy Action Plan adopted in 2015 by the European Union already resulted in €147 billion in added value from circular processes such as recovering and recycling in 2016.8

MOVING TOWARDS A CIRCULAR ECONOMY

Currently only 9% of the resources in the world are reused annually.9 The Ellen MacArthur Foundation and the book Waste to Wealth: The Circular Economy Advantage provided an overview of approaches to move towards a more circular economy. The Ellen MacArthur Foundation provides the R-SOLVE framework which is based on the following six verbs: regenerate, share, optimize, loop, virtualize and exchange.10 Waste to Wealth on the other hand provides five business models: creating circular production chains, recovering and recycling waste, extending the lifetime of products, creating sharing platforms and selling products as a service.11 Based on these two frameworks, we have distinguished three main approaches to categorize the circular economy initiatives in Turkey, namely closing the loop, resource efficiency and selling products as a service. Most approaches blend into one another, but these three provide a brief overview of the basics of the circular economy.
The first approach is to prevent waste from ending in landfill. Everything that is considered waste had an economic value once and can often be converted into a secondary raw material. In this way renewable materials can be created from the materials which are already within our economy. We can only become completely self-sufficient, if we can supply all production chains with our waste in this way. Nature has always been using the same elements over and over again via processes such as the water cycle, nitrogen cycle and carbon cycle. All these cycles are interconnected and form a perfectly closed loop which we should also try to create.

In our case, anaerobic digestion for biogas production offers a good solution for closing the loop of organic waste and recovering and recycling form the key elements for closing the loop of inorganic waste. Recycling is striving to create something of the same value, while upcycling is striving to create something with a higher value. The Turkish company Arkim has for example produced food preservative from egg shell waste from the liquid-egg producing company Anako. This egg shell waste would otherwise be landfilled and that is why this is a good example of closing the loop. The food preservative also has a higher value than the egg shell waste, which makes this a good example of upcycling. Additionally, the food preservative also has a biological meaning in the sense that it is environmentally friendly. Altogether, this is a perfect example of industrial symbiosis and the advantage of the circular economy.
**RESOURCE EFFICIENCY**

The second approach is to utilize resources as efficient as possible. The most basic way to do this is by optimizing production processes to minimize the usage of energy and raw materials. Nature is always using the bare minimum of the resources needed for optimum performance. Bird bones are for example hollow in contrast to human bones. This means there is less energy and bone material needed for the same structure, which is also lighter and suitable for flying.

In our case, industry 4.0, 3D-printing and other smart technologies offer solutions for minimizing raw materials usage, including the dematerialization of data and media via cloud computing. Other methods contributing to resource efficiency are sharing, renting, swapping and reselling. We use almost none of the objects we own on a daily basis and therefore a lot of potential use is wasted. Different digital platforms have already emerged during the last decade as a solution for this problem. The significant impact of better isolation of buildings on its energy consumption is also a topic that is getting more and more attention. The Turkish company Ekodenge is for example specialized in optimizing the energy performance of buildings with isolation, but is also taking the human-building interaction into account.13

**SELLING PRODUCTS AS A SERVICE**

The third and final approach is selling products as a service. Most products nowadays are thrown away because they became unnecessary, are malfunctioning or lost their splendour. However, these disposed products still have an economic value from which often unknown organizations are profiting. By sharing the responsibility of the products maintenance, replacement and disposal, the producer can prolong the product’s lifetime, guarantee recovery of raw materials and generate income. At the same time, this is making purchasing more appealing for the customer. As part of this marketing strategy, the producer can focus on durability, upgradability and modular design. If the product is designed in a modular way, meaning it is easy to take apart, the producer can replace broken parts more easily and use the undamaged parts for remanufacturing after the product is disposed. This is already happening for most luxury products such as cars and white goods, but can become more widespread.

The business model of selling products a service completely changes the way we look at marketing. If we for example buy a light bulb, we actually only want the light. The light bulb is only a means to provide us this service. Once the light bulb reaches the end of its lifetime, we throw it away and buy a new one. In nature single-use structures like the light bulb also exist, trees are for example making leaves to harvest sunlight and perform photosynthesis in summer. Once the leaves are not of use anymore, they fall down. The big difference here is that the leaves are decomposed by micro-organisms into nutrients, which the tree can take up again. However, the light bulb is not benefitting the owner nor the producer after its lifetime anymore. So, should there not be a more circular approach for single-use light bulbs? The Dutch company Philips has come up with a solution for this problem. They are selling light as a service at Amsterdam Schiphol Airport.14 All light installations remain the property of Philips and only the light output is charged. The lights have a modular design and are more durable and energy-efficient than conventional ones designed for single-use. This is saving Schiphol Airport a lot of tasks and costs, while Philips can maintain its valuable equipment.
WHAT ARE THE RECENT DEVELOPMENTS IN THE FIELD OF CIRCULAR ECONOMY IN TURKEY?

GOVERNMENTAL FOCUS ON WASTE MANAGEMENT

The Turkish government has taken important steps in recycling municipal waste, which is one of the essential principles for a circular economy. In 2017 first lady Emine Erdoğan launched a nationwide Zero Waste Project in collaboration with the Ministry of Environment and Urbanisation. The project is part of the harmonization with the European Union and currently end of waste criteria are also being developed. These criteria determine when waste is suited to be used as secondary raw material. Sıfır Atık, as the project is called in Turkish, has become a department of the ministry and at the
end of 2018 they published a draft zero waste policy regulation which will be finalized in 2019. The policy mainly obligates all municipalities, public- and private organizations to provide a certain amount of waste separation facilities per area. The aim is to increase the recycling rate of municipal solid waste to 35% by 2023. Many municipalities and organizations have already started providing waste separation facilities and started projects in order to create more awareness about sustainable waste management. Different initiatives developed in line with the project are reaching the news regularly. The Istanbul Metropolitan Municipality IBB for example started providing reverse vending machines throughout the city where citizens can hand in plastic bottles and aluminium cans in exchange for credits for travelling with public transport. Sıfır Atık is therefore creating awareness about waste management among the public very well. In 2018 the recycling rates of municipal solid waste already increased to 15%. Additionally, the plastic bag fee was introduced on the 1st of January 2019. This reduced the usage of plastic bags already by 80% and the introduction of deposit bottles is also planned during the period of 2021-2023.

COMPANIES LICENSED BY THE GOVERNMENT

The Ministry of Environment and Urbanisation has licensed twelve organizations. Each of them is responsible for recovering and recycling specific types of waste such as tires, batteries, packaging, plastic and paper. The Environmental Protection and Packaging Waste Utilization Foundation ÇEVKO is one of these licensed organizations and is taking on the extended producer responsibility of almost 1900 Turkish companies. They started receiving more and more questions from their members about the circular economy because of the approaching zero waste policy. Although their members are mainly operating in the food and beverage sector, the questions are very subsector specific. In that respect, Sıfır Atık could stimulate more knowledge exchange beside their essential regulating role. Although improving the waste management infrastructure might be the priority right now, sharing knowledge with the private sector about the circular economy will contribute to reach the recycling goals by 2023. The circular economy is namely offering more business models and methods for industrial symbiosis besides recycling.

ONLINE BIOMIMICRY COURSE IN TURKISH

The Consumer and Environment Education Foundation TÜKÇEV is another organization licensed by the Ministry of Environment and Urbanisation and has launched an online course called Biomimicry for Entrepreneurs in 2016. Biomimicry is about using nature as a source of inspiration and is one of the philosophical thoughts on which the circular economy is based. Everything in nature has a closed loop and if we base our innovations on nature’s principles and earth’s operating conditions, this will automatically lead to a circular economy. Imitating the aerodynamic shape of animals for vehicles to reduce air resistance is for example already Biomimicry. This is reducing fuel consumption and resulting in energy efficiency, which is one of the approaches to move towards circularity. That is why this course is indirectly also contributing to the transition towards a circular economy in Turkey.
The leading organization in the field of circular economy in Turkey is the Business Council for Sustainable Development Turkey (BCSD Turkey). In 2016 they launched Turkey Materials Marketplace (TMM), an online platform where companies can offer their waste with potential to be used as secondary raw material for sale and in 2018 they translated the book Waste to Wealth: The Circular Economy Advantage written by Peter Lacy and Jakob Rutqvist into Turkish. In collaboration with us, the Dutch Consulate-General in Istanbul, they also formed a group of trained-trainers from Turkish circularity professionals. These trainers have been trained by CIRCO to be able to teach their circular design methodology in Turkey. Ten Turkish companies have already followed a three-day Circular Design Class mid-2019 and the aim is to increase this number.

TMM was funded by the European Bank for Reconstruction and Development (EBRD) and they are currently looking for a self-sustaining business model. The aim of the platform is to create industrial symbiosis by the concept of closing the loop. Currently the platform has more than 60 members and more than 70 different types of materials available, which are mostly supplied continuously. However, until mid-2019 only eight successful one-time transactions have been made in the fields of organic and electronic waste. Although the members signed up voluntarily, Turkish companies seem to stick to traditional manufacturing and do not want to take a risk. That is why transactions develop slowly. In order to give the platform a boost TMM started mediating more actively between their members and giving financial support in the form of Circular Vouchers in 2018. Their members can apply for these vouchers in order to cover R&D and machinery costs to process waste into a secondary raw material. This gave the platform a boost and multiple confidential projects are currently still being developed.

The Circular Economy Cooperative D-Cube is another NGO pioneering in the field of circular economy in Turkey and has been launched in 2018. They are working together with the Scientific and Technological Research Council of Turkey TÜBİTAK and are involved in the development of start-ups with circular business models. In case of existing companies, they are discussing possibilities to promote the circular economy amongst the members of the Turkish Family Business Association TAIDER. Additionally, they are also investigating circular initiatives in Turkey and have published an extensive report about traditional textile recycling in the Uşak province of Turkey recently.
FINANCING CIRCULARITY IN TURKEY

The European Bank for Reconstruction and Development (EBRD) is one of the main organizations in Turkey financing projects in the field of circular economy. In 2015 they started the Near Zero Waste NØW project in Turkey, which is mainly focusing on industrial symbiosis and the reduction of waste. NØW has financed two projects which can be categorized as closing the loop, namely Turkey Materials Marketplace that was explained before and Şişecam’s glass collection project. Şişecam is Turkey’s biggest glass producer. In order to improve the recycling of glass in Turkey, more than 20,000 glass collection containers were distributed throughout the country with financing of NØW. Other projects financed by NØW are about biogas production, energy efficiency and water treatment, which can all be categorized as projects about resource efficiency.

Additionally, the Scientific and Technological Research Council of Turkey TÜBITAK has different collaborations with the European Union (EU) to finance the transition towards a circular economy. The Horizon2020 program is the biggest research and innovation program of the EU ever and TÜBITAK is also involved. The Turkish white good producer Arçelik is for example taking part in the project called Circular Services in the Electric and Electronic Sector (C-SERVEES) and three Turkish construction companies are participating in the project called Fostering Industrial Symbiosis for a Sustainable Resource Intensive Industry across the extended Construction Value Chain (FISSAC).

CIRCULAR INITIATIVES FROM THE TURKISH PRIVATE SECTOR

Various Turkish companies have strategically adapted circular initiatives already. The vision of Arçelik, the biggest white good producer of Turkey, is for example respectful to the world, respected worldwide. In line with this vision, they have introduced a vacuum cleaner made of 90% recycled plastics, used recycled plastic bottles for the plastic parts of their washing machine tubs and aim to normalize the usage of recycled and bioplastics for manufacturing. The Turkish Garanti Bank on the other hand offers a green loan for companies, indexed to the sustainability performance of the concerning company. Other companies such as Şişecam and Sütaş mainly focus on resource efficiency. Şişecam has increased the energy efficiency of its factories by almost 20% between 2017 and 2019. Sütaş, one of Turkey’s biggest diary producers, on the other hand uses almost all of its organic waste for biogas production.
There have been multiple more creative approaches towards circularity in Turkey. Artist Şinasi Yelkenci is for example promoting upcycling in its most basic form by making art from plastics from the ocean. We have held a similar exhibition in Istanbul and at Abdullah Gül University with art made from waste by Dutch artists in order to promote upcycling and circularity.30 This exhibition will continue travelling around Turkey. Utilizing waste materials has actually been part of Turkish culture since a long time. As a result, different circular start-ups based on traditional Turkish skills such as weaving carpets from old cloth and braiding bags from plastics are initiated by the creative youth. Turkey, such as all Mediterranean countries, also has an ancient olive oil culture and Pomace is a project funded by the Dutch Stimuleringsfonds to capture the circular initiatives in the Turkish olive industry and promote the circular economy in Turkey’s Aegean Region.31 Similarly, Biolive is a successful start-up that is producing bioplastics from olive kernels, giving local traditions a modern boost.32 However, one of the most traditional forms of upcycling might be toy-making by children. The added value of these toys cannot be achieved by any modern technology. Award-winning projects such as GOM and Toyi teach children how to make toys from respectively paper and packaging material.33/34 These creative projects show that circularity has always been part of Turkish culture and that it has to be made ‘cool’ again. That will counter the arising social construct that second hand is something bad.
One of the main requirements for a circular economy is that different stakeholders need to work together. The government, private sector and academy can all benefit from the opportunities provided by the circular economy. Cross-border partnerships can also be established. Governments could exchange knowledge on procurement of circular economy projects and necessary legislation adaption. The private sector and the academy could work together to share best-practices about waste management and co-financing R&D projects in this pioneering topic. That is why circularity is also an important topic in the Year of Research and Innovation (YORI) between Turkey and the Netherlands, which will start at the end of 2019 to see whether a bilateral research collaboration can be developed. Although closing the loop and resource efficiency approaches are increasing in Turkey and the Netherlands, approaches to sell products as a service still need to become more widespread. This will require a new way of looking at marketing.
We started looking at plants as a whole rather than only looking at its edible parts.
CIRCULAR FASHION AND TEXTILE

The Turkish textile sector was the second largest export sector of Turkey in 2018. With exports worth $17.6 billion, it made Turkey the sixth largest clothing exporter in the world and the third largest clothing exporter to the European Union (EU). The Netherlands being the fifth biggest market for Turkey in the EU. The demand on sustainable clothing in the Netherlands is increasing. More than half of all garment and textile businesses in the Netherlands signed the Dutch Agreement on Sustainable Garments and Textile in 2016. In addition to fair working conditions, this agreement also focuses on reducing the negative impact of the fashion industry on the environment. That is why we also see collaboration possibilities for the implementation of circular initiatives in the textile sector.

We already organized a Circular Design Workshop about circular fashion and textile provided by CIRCO mid-2019. The attendees were product designers and managers from big Turkish textile producers such as Zorluteks and Orta Anadolu and international brands such as H&M and IKEA. During the workshop it became clear that the participants are very interested in the circular transition and are realizing it is a necessity to protect the environment. Additionally, the Turkish textile industry has to keep competing with low wage countries and they do this mainly by distinguishing themselves with their technological lead.

Orta Anadolu, which is one of Turkey’s biggest denim producers, has already a project ongoing in collaboration with the Dutch organization Circle Economy. Söktas, a Turkish cotton weaving company, on the other hand has participated in EU-funded Trash-2-Cash research project with the aim to create new fibers from textile waste. Besides the Dutch market, the Turkish market for sustainable clothing is also growing. Istanbul-based Reflect Studio is for example manufacturing limited edition sustainable clothes in response to mass-production. The Netherlands also has multiple organizations which are interested in the field of sustainable fashion and textile, such as Modint and Fashion for Good. That is why we would like to explore the possibilities to organize a partners for international business (PIB) program about circular textile. We are now discussing the possibilities with Turkish and Dutch organizations and plan to start the exploration-phase at the end of 2019.
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