Circular Economy and Plastics: A Gap-Analysis in ASEAN Member States

-Enhanced Regional EU-ASEAN Dialogue Instruments (E-READI)-

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Project objective and components

"Circular Economy Regional Gap-analysis: Reviewing Actions by National Governments"
with support from the Enhanced Regional EU-ASEAN Dialogue Instrument (E-READI)

Overall:

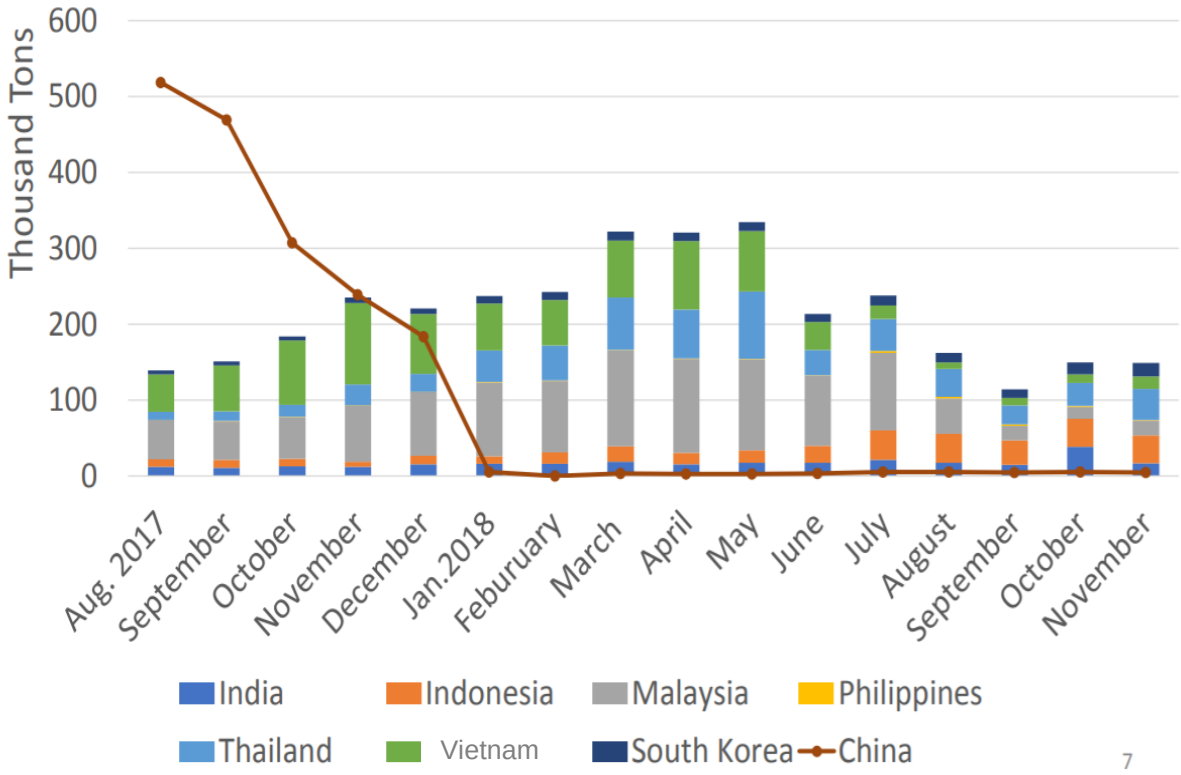
- To develop a knowledge base for follow-up actions, mainly in the form of EU-ASEAN collaboration

Main components:

- Review government policies and legislations
- Identify countries and policy areas where there is both high potential for improvement and strong interest in in joint follow-up action
- Stakeholder mapping, examples of initiatives by non-state actors
- Explore the need for and interest in a regional initiative on Circular Economy, in particular targeting plastics

Situation in the region

Import of plastic waste by selected Asian countries, August 2017 - November 2018



Source: Data from Global Trade Atlas, graph courtesy of Kojima M. 2019. Available at: http://www.uncrd.or.jp/content/documents/7455PS-3-PPT-2.pdf

Option Exists	Option does not Exist	Option partially exists or is In Process

Roles typically played by national governments in South-East Asia in relation to key life-cycle stages of plastics (Draft version)

Country	Plastic-specific Strategy	Ban of single-use plastics	Levy/charge on single-use plastics	Deposit-refund scheme	EPR-based recycling policies	Sorted collection	Voluntary scheme/pilot projects	Marine plastic pollution prevention	Prevention of littering	Import regulation
Brunei								Prevention of Pollution of the Sea Order	Sub decree in 1999	
Cambodia						Sub-decree on plastic waste management				
Indonesia	Plan of Action on Marine Plastic Debris, 2017-2025	Ban on plastic bags in some cities	Pilot of plastic bag tax in 2016 at retailers in 23		Planned – but not yet applied		Voluntary based recycling by private sector	National Action Plan on Marine Debris (2017-2025)		Import ban on certain types of plastic waste
Lao PDR						Mandatory	Community solid waste management project			
Malaysia	Roadmap towards Zero Single-Use Plastics (2018-2030)		Pollution charge; Ban on non-biodegradable plastics; Levy on plastic bags		Planned –but not yet applied	Pilot level in selected city areas				Taxation of waste plastics

Myanmar		Partial -Ban on thin plastics								Under considerations
Philippines	Under development	Partial bans on the use of plastic bags				Yes	Local bans on the use of plastic bags	Manila Bay Clean Up		
Singapore					Reporting requirements for packaging data and packaging waste reduction plans by 2021	National Recycling Programme	Singapore Packaging Agreement; Schools Recycling Corner Programme	The Prevention of Pollution of the Sea Act and Regulation	Environment Public Health Act (littering in general)	
Thailand	Master Plan on Plastic Waste Management; National Roadmap for the Development of Bioplastics Industry	phasing out of plastic bags at national hospital	Planning possible tax mechanism			Law of Promotion of Source Segregation (2020)	Pilot Project on Plastic Waste Collection in Coast			Import ban on plastic wastes
Viet Nam	Planning (National Strategy on ISWM to 2025, vision to 2050)		Levy on non-biodegradable plastics		Not yet applied		Program on control of waste from plastic bags	Not specifically mentioned (Law on Marine and Island Natural Resources and Environment)		Trade import regulation for quality; Considering tax for import of single-use plastics

Roles typically played by national governments in South-East Asia in relation to key life-cycle stages of plastics (1)

Life-cycle stage	Typical government roles
Plastics production and trade	– Plastics is regulated as any other industry and traded as any other commodity – The plastics industry is often seen as an important **engine of economic development and job creation** – potential conflict between policy objectives
Manufacturing and trade of plastic goods, including packaging	– Regulated as any other industry and traded as any other products – Basically no attempts to discourage **problematic kinds of plastics**, combinations of materials, or **designs** – Weak or nonexistent regulations of **plastic additives**, including **hazardous substances** – Few attempts to encourage **alternative materials**, including bio-based plastics

Roles typically played by national governments in South-East Asia in relation to key life-cycle stages of plastics (2)

Life-cycle stage	Typical government roles
Distribution and use	– Increasing number of initiatives to **discourage plastic items provided to consumers** at the point of purchase (such as carrier bags, food trays, drinking cups, cutlery, straws) but mainly at local level and with uneven implementation effectiveness – Few efforts to influence **packaging design** or amount, or to stimulate business models that **reduce packaging need**
Waste collection and management	– Responsibility often delegated to local governments, insufficient coverage of **collection** services, large leakage to the environment due to inappropriate **disposal**, widespread open **burning** – Significant collection of waste plastics through **informal channels** – Some formally organised **segregated collection** of waste plastics

Roles typically played by national governments in South-East Asia in relation to key life-cycle stages of plastics (3)

Life-cycle stage	Typical government roles
Recycling and use of recycled plastics	• Some government initiatives to **stop visible polluting operations** • Limited efforts to **improve the recycling chain**, • Few initiatives to **stimulate demand** for high-quality recycled plastics
Import of plastic waste for recycling	• **Regulated or banned** by many governments but enforcement is challenging • Countries taking **individual action**; lack of regional coordination

Gaps and options for actions

Four types of gap

1. Information and knowledge
2. Policy and governance
3. Technical capacity
4. Markets and finance

Gaps in information and knowledge

- Data on use patterns and trends, as well as on waste handling and recycling routes
- Understanding of types of plastics and their properties, applications and benefits; associated issues at different life cycle stages, and sustainable alternatives
- Knowledge on the relative merits of different recycling options, including “down-cycling” and “closed-loop” recycling
- Awareness on issues associated with hazardous chemicals and substances of concern found in plastics

Gaps in policy and governance

- Clarity on mandates, roles and responsibilities at different levels of and agencies of government
- Comprehensive frameworks with policy packages and instruments to follow up on national strategies and plans
- Effective approaches for governments to engage and coordinate diverse stakeholders
- Tools and guidelines to support action by stakeholders

Gaps in technical capacity

- Limited technical training of responsible personnel in the complexities of plastics, including chemical, supply chain, and environmental aspects of different types of plastics
- Technological and human-resource constraints in managing post-use plastics, often including lack of infrastructure for preventing environmental leakage of plastics
- Low capacity for innovation, especially among SMEs
- Few initiatives to encourage innovation, including social innovation to reduce plastic use as well as

Gaps in markets and finance

- Access to financing for eco-solutions, including development of alternatives to plastics and efficient post-use processing
- Shared and accepted standards for recyclables to ensure quality control and bring trust in the market
- Access to markets for recyclables
- High perceived market uncertainty, hampering investments
- Uncertainty regarding how to effectively transition from completely market-driven (and largely informal) recycling system to more regulated and formalised systems

Recommendations: Regional initiatives for addressing plastics across ASEAN Member States

1. Technical standards for plastic products and recycled plastic
2. Guidelines on circularity in plastics use
3. Phasing out of harmful additives
4. An ASEAN-wide network for research and innovation on plastics
5. ASEAN framework agreement on plastic pollution

Emerging Opportunities and Actions

- Regional Knowledge Center on Marine Plastics for ASEAN+3
  - ✓ Japan proposed to establish this information and policy hub in ERIA (Economic Research Institute for ASEAN and East Asia) in Indonesia.
- ASEAN Resources Panel
  - ✓ UNESCAP and ASEAN proposed several complemental actions in the region for SDGs and ASEAN community vision 2025
  - ✓ ASEAN Resources Panel is one of such proposals for analyzing and developing policy-relevant knowledge for sustainable resource management for ASEAN + X.
  - ✓ UNESCAP is now under preparation to realize this proposal.
- G20 Blue Ocean Vision
  - ✓ Japan is going to promote international cooperation including marine plastic reduction actions in ASEAN+3 (ASEAN+3 Marine Plastic Litter Cooperation Action Initiative: development of national action plans, promotion of the 3Rs etc).
- ADB's Action Plan for Healthy Oceans and Sustainable Blue Economies for the Asia and Pacific
  - ✓ 5 billion USD investment in the area of ocean sustainability including marine plastic litter
- Many others

- Utilize these emerging opportunities not only about marine plastics but as a step for policy collaboration and coordination for circular economy in the region.
- OECD-style policy analysis and coordination function is necessary to mainstream circular economy in the region (ASEAN+3)
- EU and Japan can/should collaborate to coordinate international efforts in the region.