Circular Procurement: an exploratory study of barriers to implementation and opportunities

Giulia Ziino

Dissertation written under the supervision of Prof. Valentina Carbone

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Author: **Giulia Ziino**

Abstract

Businesses across the world are facing the unprecedented challenge of long-term cost optimization and competitivity in a world where natural resources are scarce and become even scarcer by every passing day. As sustainability becomes more than just a nice-to-have for the survival itself of some lines of business, circular economy can be identified as an opportunity to produce better with less. This pivotal shift calls for operational and large-scale restructuring. This paper will investigate the yet unstructured market of circular supply chains, the challenges that inevitably arise, the barriers to large-scale implementation that company are currently facing and the solutions that have been, are and will be adopted.

Keywords: Circular Economy, Circular Procurement, Corporate Procurement, Innovation

Resumo

Empresas em todo o mundo enfrentam o desafio sem precedentes de otimizar custos e competitividade a longo prazo, num mundo onde os recursos naturais são escassos e se tornam cada vez mais escassos a cada dia que passa. À medida que a sustentabilidade se torna mais do que apenas algo desejável para a própria sobrevivência de algumas linhas de negócio, a economia circular pode ser identificada como uma oportunidade para produzir melhor com menos. Esta mudança fundamental exige uma reestruturação operacional e em grande escala. Este artigo irá investigar o mercado ainda não estruturado das cadeias de abastecimento circulares, os desafios que inevitavelmente surgem, as barreiras à implementação em grande escala que as empresas enfrentam atualmente e as soluções que foram, são e serão adotadas.

Palavras-chave: Economia Circular, Aquisição Circular, Aquisição Corporativa, Inovação

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1. Introduction

1.1. Circular economy: a paradigm shift to boost sustainable growth

1.1.1 What is circular economy

The circular economy (CE) is an emerging model that redefines traditional standards of production and consumption. It promotes strategies aiming to decouple economic growth from resource depletion and environmental degradation.

Industrial application of circular economy principles in real-life scenarios can be traced back to the 1970s (Ellen MacArthur Foundation 2013). Deeply reliant on concepts such as industrial ecology (defined by Jelinski et al. (1992) as an approach aiming at optimizing material cycles, from virgin materials to waste, by promoting industrial collaborations), cradle-to-cradle design (McDonough and Braungart (2002) theorized a design system based on the parallelism between the natural world, where waste from one species becomes a nutrient for another, and the industrial setting, where waste and byproducts can and should be transformed in raw materials and inputs for new production lines), and systems thinking, CE can be defined as a regenerative economic system that seeks to minimize resource input, waste, emissions, and energy leakage by slowing, closing, and narrowing material and energy loops through design, maintenance, reuse, remanufacturing, refurbishing, and recycling (Geissdoerfer et al. 2017).

At its core, circular economy is strengthened by several interrelated principles particularly salient for business strategy and operations. Some of these, such as eco-design, reuse and repair, aim at closing resource loops by prolonging products' lifetime; others, such as rental services or Product as a Service systems, aim at shifting from property to use, thus reducing the need for overproduction. Either way, circular economy is a framework to which modern value chains need to adapt, both from a cultural and operational standpoint.

1.1.2 Design for longevity and circularity

Circular businesses adopt product designs that prioritize durability, reparability, and modularity, thus enabling products to remain in use longer and facilitating easier disassembly for reuse or recycling (Schäfer and Löwer 2020). By simplifying disassembling of products and repairability, manufacturers reduce lifecycle costs and enhance brand reputation, especially in sectors like electronics, fashion, and automotive (Cordella et al. 2021), where the practice of purchasing high-quality items to be used across several years is very common. In late 2024, I have personally witnessed at the Renault's circular factory a great example of design for

circularity. The ReFactory in Flins, a small town North-West of Paris, is Renault's factory that has pioneered circular innovation in the automotive industry. In Flins, everything is designed for circularity: in 2020, the group has undergone a massive restructuring of their value chain (ranging from reskilling over 50,000 employees to building new expertise in remanufacturing and retrofitting) to turn this old factory into a hub for circular innovation. Unlike most actors in the market that privileged smaller and more compact engines to reduce production cost and provide a more elegant design, Renault has designed and engineered their first electric engines without glueing the parts together in order to maximize their repairability. This way, in case of malfunction, the engine can easily be disassembled and only the faulty part can be replaced, thus preserving the rest of the materials that are still functional.

1.1.3 Resource efficiency and waste elimination (7Rs)

Central to circular economy is the 7Rs framework. This framework rapidly evolves, and many versions are observed in the literature. The one presented below is inspired by the work of Araujo-Morera et al. (2021).

1. Redesign emphasizes the need for eco-design to achieve longevity and repairability of products, thus prolonging product lifetime and maximizing its lifetime value.
2. Renew embeds the need to integrate secondary materials into new outputs. A successful example of this principle are the furniture produced by the French manufacturer Furniture For Good, turning restaurant waste materials such as mussel shells into chairs and tables. The seafood is fused into a plastic material, reducing the need for virgin plastic to provide structure.
3. Reduce consists in optimal use of materials, reducing the need for overproduction, while seeking to maintain high performance standards with less resources.
4. Reuse advocates for extending the functional life of products and components through repeated utilization, or redistribution without significant reprocessing, such as reselling or donating functional, yet unused, items. For instance, the French company CircularPlace, with its BtoB marketplace for second-hand professional product, aims at granting company assets a second life by pooling equipment among the various branches of the same group, selling items to professional buyers, or donating them to charities.
5. Repair aims at extending product lifetime, reducing waste and resource inputs. The French company Vesto, for instance, is specialized in repairing and refurbishing HoReCa equipment to save them from landfills.

6. Recover involves the creative adaptation of items for alternative functions, often breaking them down into smaller components, or adapting them for a different purpose than their original function.
7. Recycle, the least preferred of the seven in sustainability terms, involves processing waste materials into new products, typically requiring more energy and infrastructure.

The 7Rs framework promotes minimizing material inputs, extending the utility of products, and reclaiming value from waste (Phonthanukitithaworn, Srisathan, and Naruetharadhol 2024). This hierarchical framework prioritizes waste prevention over downstream waste management, serving as a strategic guide for businesses and consumers to adopt more sustainable production and consumption patterns. For businesses, the major consequence is often cost savings, reduced dependency on raw material markets, and improved compliance with environmental regulations.

1.1.4 Closed-loop supply chains and reverse logistics

Circular economy models encourage the creation of closed-loop systems in which end-of-life materials and products are reintegrated into the supply chain through reverse logistics, remanufacturing, and component collection (Agrawal, Singh, and Murtaza 2015). This requires high investment in traceability systems, take-back schemes, and new forms of customer engagement, but it can generate competitive advantages (Cricelli, Greco, and Grimaldi 2021). While integrating a fully efficient reverse logistics mechanism is a big challenge for businesses, it can open up new opportunities in terms of customer retention and market leadership (Mokhtar et al. 2019).

1.1.5 Systems thinking and industrial symbiosis

A systemic perspective is critical in CE, where businesses consider not just their internal operations but their role within broader value networks and ecosystems (Parida et al. 2019). Eco-industrial parks (EIP) are defined as a collaborative network of businesses located within a shared industrial area that engage in planned exchanges of materials, energy, water, and by-products to achieve both environmental and economic benefits (Boix et al. 2015). EIPs function based on the principle of industrial symbiosis, where geographically proximate firms form mutual partnerships to share resources such as waste heat, treated water, or by-products (Gibbs 2008). The goal is to transform waste from one company into useful input for another, thereby closing resource loops. This approach has proven effective and has been tested and implemented in several industrial ecosystems (Yuan, Bi, and Moriguichi 2006).

1.1.6 Servitization and new business models

CE supports a shift from product ownership to Product-as-a-Service (PaaS) models, such as leasing, sharing, or pay-per-use arrangements (Hidalgo-Crespo et al. 2024; Lacy and Rutqvist 2015). These models generate recurring revenue streams and foster stronger customer relationships while retaining control over product life cycles for optimized reuse or recovery. Servitization is defined as the transformation of traditional product-based business models into service-oriented ones, where companies no longer solely sell products, but instead offer them as services (Han, Heshmati, and Rashidghalam 2020). The French retailer BUT, for instance, provides long-term rentals for a selection of their items, such as furniture and household appliances.

1.1.7 Technological, institutional, and social integration

As highlighted in recent literature, successful implementation of CE requires integration across three pathways: technological innovation, institutional support (regulatory frameworks, incentives), and social acceptance (consumer behavior, cultural values) (Kalmykova, Rosado, and Patrício 2016). A multi-stakeholder approach is required to overcome institutional inertia, share risks and rewards, and scale circular innovations. The transition to circular economy is as much a social transformation as it is a technical or economic one, and it centers on the ability of diverse actors to work together under shared principles and commitments (Luthra et al. 2022).

From a business perspective, embracing the circular economy not only aligns with growing environmental and social expectations but also opens up opportunities for cost reduction, innovation, and resilience. Companies that lead in circular practices are better positioned to mitigate supply chain risks, differentiate their offerings, and comply with emerging regulatory standards on sustainability (Han, Heshmati, and Rashidghalam 2020). However, the transition to circular economy is complex and necessitates strategic rethinking, capability development, and cross-sector partnerships (Geissdoerfer et al. 2017).

The circular economy offers a powerful approach for companies to simultaneously enhance both financial and environmental performance. By shifting from a traditional linear model of "take-make-dispose" to a circular system focused on reducing, reusing, and recycling resources, companies can significantly improve resource productivity and eco-efficiency (Araujo-Morera et al. 2021). This reduces raw material costs and minimizes waste and pollution, leading to cost savings and improved regulatory compliance. Furthermore, firms that implement cleaner production practices and adopt green technologies are often recognized as environmentally

responsible, which can enhance brand reputation and market competitiveness (Mokhtar et al. 2019). Enterprises engaging in circular practices benefit not only from improved environmental performances but also from new business opportunities, investment incentives, and value creation across the entire value chain (Yuan, Bi, and Moriguichi 2006).

1.2. Circular procurement: an overview

Circular procurement represents a strategic mechanism through which organizations execute circular economy principles by embedding lifecycle thinking, resource efficiency, and value retention into their purchasing practices (Xu et al. 2022). It moves beyond traditional cost-focused procurement models by embedding environmental, economic, and innovation goals through close collaboration with internal departments and external stakeholders, including suppliers, policymakers, and end-users (Rizzi et al. 2014).

Essentially, circular procurement seeks to influence market offerings and stimulate innovation by actively selecting goods and services that contribute to circular business models (Eltayeb and Zailani 2010), such as reuse, repair, remanufacturing, refurbishment, and recycling, while minimizing environmental impact and dependency on virgin resources (Pinheiro et al. 2022).

This procurement model is not solely concerned with the characteristics of the product but also with the processes and systems that support the product's entire lifecycle, including design, use, and end-of-life (Guide and Van Wassenhove 2009). Procurement professionals thus play a pivotal role as enablers of circularity, influencing demand, guiding supplier practices, and ensuring that technical specifications align with circular objectives (Pollice and Batocchio 2018).

Circular procurement also requires multidisciplinary and multistakeholder governance, emphasizing collaboration across functions (e.g., procurement, sustainability, operations) and sectors (public, private, nonprofit) (Tapaninaho and Heikkinen 2022). It often involves tools such as market dialogue, lifecycle costing, and performance-based specifications to align supplier capacities with circular goals (Parikka-Alhola 2008; Luthra et al. 2022).

Digital technologies, particularly those associated with Procurement 4.0 (e.g., blockchain, IoT, big data), are increasingly seen as enablers of circular procurement. These technologies support traceability, transparency, and monitoring of circular performance indicators, allowing for real-time information exchange and stakeholder coordination (Bag et al. 2020).

Circular procurement is both a procurement function and a systemic intervention tool to stimulate circular innovation, reduce supply chain dependencies, enhance resilience, and generate long-term economic and environmental value.

1.2.1 Challenges to adoption of Circular Procurement strategies

Circular procurement presents a range of operational, institutional, and technical challenges that organizations need to navigate to effectively implement circular economy principles. Among the primary obstacles, the limited availability of suppliers capable of meeting circular specifications is one the major barriers to implementation, particularly in rising or fragmented markets (Parikka-Alhola 2008). Cultural resistance within organizations may also undermine efforts, as users and managers may perceive refurbished or service-based products as inferior or risky (Qazi and Appolloni 2022). Procurement professionals face the added complexity of drafting technical specifications that capture lifecycle impacts and performance-based outcomes, which often require cross-departmental coordination and external expertise (Xu et al. 2022). Moreover, transitioning to models such as product-as-a-service involves contractual and financial shifts, including new service-level agreements and budgetary adjustments from capital to operational expenditures (Hidalgo-Crespo et al. 2024). In sectors such as construction, the lack of standardized criteria for recycled materials and conservative risk-averse practices among engineers further inhibit circular procurement uptake (Qazi and Appolloni 2022). The absence of harmonized regulatory frameworks and difficulties in tracking product flows, particularly in textiles and ICT, compound these challenges by introducing legal and logistical uncertainty (Veleva and Bodkin 2018). These barriers underscore the importance of multi-stakeholder engagement, governance innovation, and capacity building across the procurement ecosystem (Pinheiro et al. 2022; Luthra et al. 2022; Pollice and Batocchio 2018).

1.2.2 Benefits to implementations

Despite these challenges, circular procurement offers substantial benefits to organizations willing to adopt a lifecycle-oriented and collaborative approach to sourcing. From a financial perspective, it enables long-term cost savings through reduced maintenance, extended product life, and lower end-of-life disposal expenses (Dubey, Gunasekaran, and Samar Ali 2015). Operationally, it enhances supply chain resilience by reducing reliance on virgin materials and fostering closed-loop material flows, thereby mitigating risks associated with resource scarcity and price volatility (Ellen MacArthur Foundation 2013). Strategically, circular procurement supports innovation and market differentiation, particularly in sectors where environmental

performance and ESG compliance are increasingly valued by consumers, investors, and regulators (Porter and van der Linde 1995). In public procurement, it serves as a catalyst for regional circular economy development, stimulating demand for circular business models and services (Alhola et al. 2019). The integration of digital technologies such as blockchain and IoT further amplifies these benefits by enabling traceability, real-time monitoring, and collaborative data sharing across supply chains. When successfully implemented, circular procurement strengthens inter-organizational relationships, aligns procurement with sustainability and innovation goals, and contributes directly to climate and resource efficiency targets (Alhola et al. 2019; Veleva and Bodkin 2018; Hoeft et al. 2021).

2. Literature review

2.1. The real-life challenges of Circular Procurement

Circular procurement is fast emerging as more than a sustainability trend: it is a pragmatic, forward-thinking approach redefining how organizations source, manage, and optimize resources within their supply chains (Farooque et al. 2019). Unlike traditional procurement models, which often treat purchasing as a discrete, transactional event focused primarily on price, circular procurement demands a holistic, life-cycle orientation (Ünal et al. 2019). This shift is not simply an environmental imperative: it is first and foremost a business opportunity deeply rooted in economic realities, operational resilience, and competitive advantage (Antikainen and Valkokari 2016).

Circular procurement is an application of the principles of circular economy to procurement, where the goal is to slow, close, and narrow material loops through strategies such as reuse, remanufacturing, and recycling (Pollice and Batocchio 2018). Traditionally, these concepts were advocated as merely ethical or ecological choices, but the landscape has changed sharply. Recent shocks, from the disruptive impact of the COVID-19 pandemic on global logistics to extreme volatility in commodity pricing and accelerated depletion of critical raw materials, have exposed weaknesses in linear procurement systems (Mastos et al. 2021) and paved the way for cost-effectiveness in circular business models.

Nonetheless, many organizations remain anchored in linear procurement paradigms. Key performance indicators (KPIs) largely emphasize short-term cost reductions at purchase, ignoring the broader and more significant costs tied to the full lifecycle of products and materials (Qazi and Appolloni 2022). Such a narrow focus leads to missed opportunities for value preservation and resource efficiency. Furthermore, internal organizational cultures and competencies are frequently misaligned with the demands of circular procurement. Effective CP demands cross-functional collaboration, systems thinking, and a fluency in lifecycle costing, capabilities not traditionally embedded within procurement teams (Qazi and Appolloni 2022).

Supplier markets remain underdeveloped and fragmented with regard to circular solutions (Tapaninaho and Heikkinen 2022). Many suppliers lack the capability or incentive to innovate towards modular product designs or to invest in reverse logistics infrastructure (Rahman and Subramanian 2012). Regulatory frameworks lag behind industry evolution, with legal ambiguities around recycled content standards, waste ownership, and environmental compliance creating uncertainty and friction (Agrawal, Singh, and Murtaza 2015).

Yet, these challenges should not obscure the compelling opportunities CP offers. From a cost perspective, circular procurement unlocks substantial savings by reducing dependence on volatile virgin material markets and minimizing waste processing and disposal expenses (Tura et al. 2019). Operationally, it builds supply chain flexibility by diversifying inputs, reducing exposure to geopolitical tensions and resource bottlenecks (Lahane and Kant 2021).

Moreover, circular procurement enables pioneering business models such as leasing and product-as-a-service arrangements. These models shift the supplier-buyer relationship towards continuous engagement, fostering innovation, enhanced asset utilization, and ongoing revenue streams beyond traditional product sales (Han, Heshmati, and Rashidghalam 2020). The economic benefits merge with increasing investor and customer attention on Environmental, Social, and Governance (ESG) factors. Organizations leading in circular procurement are positioned to access ESG-related capital more readily, benefit from regulatory incentives, and cultivate stronger market reputations.

Technology, particularly tools of the 4.0 industry, such as artificial intelligence, blockchain, Internet of Things (IoT), and big data analytics, is an indispensable enabler (Pinheiro et al. 2022; Mastos et al. 2021). These technologies make transparent the often opaque flows of materials across complex supply networks. They empower real-time traceability, dynamic supplier performance evaluation, and robust lifecycle cost forecasting. By leveraging data-driven insights, procurement teams can transition from reactive purchasing to proactive resource stewardship, maximizing value while minimizing risk.

In conclusion, circular procurement transcends traditional cost-cutting or sustainability exercises. It is a strategic opportunity to redesign procurement as a driver of systemic efficiency, innovation, and industrial agility. While barriers such as organizational inertia, immature markets, and regulatory uncertainty persist, the momentum behind circular procurement is unmistakable and justified (Qazi and Appolloni 2022; Luthra et al. 2022). Embracing CP equips organizations not only to navigate the growing resource constraints of our times, but to convert these challenges into competitive strength to anticipate and prevent future resource scarcity. The future belongs to those who look beyond the price tag and recognize procurement as a leverage point for sustainable value creation.

2.2. Circular Procurement: A Cost-Opportunity perspective

While the potential gains from CP are striking, it is essential to critically examine both the systemic challenges that obstruct its broader adoption and the pathways through which organizations can realize its multifaceted benefits.

2.2.1 Rethinking cost: from transactional to lifecycle orientation

At the heart of circular procurement is a fundamental shift from the traditional transactional mindset, where cost is narrowly framed as the purchase price, to a more holistic understanding that integrates total cost of ownership (TCO) (Han, Heshmati, and Rashidghalam 2020). This lifecycle thinking embodies a more realistic and ultimately optimistic view of value creation (Islam, Jollands, and Setunge 2015). CP encourages organizations to consider not only upfront expenses, but also downstream costs associated with storage, waste, disposal, replacement, and environmental externalities (Zink and Geyer 2017). In doing so, it challenges the inertia of procurement behaviors entrenched in rigid, cost-based KPIs, which notoriously prioritize short-term financial metrics over long-term value (Abu-Ghunmi et al. 2016).

Yet, this shift is easier conceptualized than operationalized. Many procurement functions remain structurally resistant to reorienting KPIs, reflecting organizational silos and limited interdepartmental collaboration (Cuijpers, Guenter, and Hussinger 2011). Furthermore, the capacities required to perform sophisticated lifecycle costing and systems thinking are underdeveloped in many teams (Guinée et al. 2011). Here lies a critical tension: CP demands a level of competence and organizational flexibility that current procurement structures often lack. Without addressing these human capital and cultural barriers, CP initiatives risk becoming superficial or, worse, tokenistic.

2.3. Supply-side complexities: market and infrastructure challenges

Externally, markets supplying circular products and services are still emerging and fragmented. Suppliers equipped to deliver remanufactured, refurbished, or recycled goods often face scalability issues and pricing structures that may not yet compete with established linear supply chains (Veleva and Bodkin 2018). Product design remains a persistent obstacle, with many goods lacking modularity or disassembly features that enable material recovery and reuse (Schäfer and Löwer 2020). This design gap is not trivial; it directly impacts the feasibility and cost-effectiveness of circular procurement efforts.

Similarly, reverse logistics, the backbone of circular material flows, remains underdeveloped and costly in many regions (Cricelli, Greco, and Grimaldi 2021). These systemic infrastructure

limitations compound the challenge and increase uncertainty for procurement managers evaluating circular options (Qazi and Appolloni 2022). Moreover, policy frameworks and regulatory clarity around recycled-content standards, product ownership in waste streams, and incentives for circularity remain inadequate and inconsistent, further complicating supplier engagement and compliance.

Although daunting, these supply-side challenges create a fertile field for innovation and collaboration. Organizations that proactively engage with suppliers to co-create circular solutions can unlock differentiation and build more resilient ecosystems (Parida et al. 2019). Early movers investing in supplier development and modular product design will likely cultivate competitive advantage in what is fast becoming a new procurement frontier.

2.4. Economic and strategic payoffs: tangible opportunities beyond sustainability

The narrative around circular procurement often centers on environmental benefits, but this perspective risks undervaluing its compelling economic rationale. In reality, CP aligns directly with strategic priorities such as cost control, risk management, and revenue innovation (Han, Heshmati, and Rashidghalam 2020). By reducing reliance on virgin raw materials, whose prices fluctuate sharply due to geopolitical events and supply disruptions, CP can stabilize input costs, thereby enhancing risk tolerance (Geng et al. 2009; Haas et al. 2015).

The notion of servitization further redefines value capture, moving firms beyond ownership to ongoing customer relationships and circular revenue streams (Luz Martín-Peña, Díaz-Garrido, and Sánchez-López 2018). This shift unlocks new business models that are more closely aligned with customer demands for flexibility and sustainability, translating into loyalty and market penetration advantages.

Moreover, CP positions organizations favorably within the evolving regulatory landscape and ESG capital markets (Halbritter and Dorfleitner 2015). Increasingly, regulators mandate circularity, and investors reward firms with credible circular strategies. Thus, CP not only manages costs but opens avenues for growth, funding, and brand enhancement.

2.5. Technology as an enabling force

Advances in Industry 4.0 technologies, and big data analytics are crucial accelerators for CP. These technologies enable unprecedented traceability across material flows, dynamic supplier performance management, and real-time lifecycle cost forecasting (Bougdira, Akharraz, and Ahaitouf 2020). With digital tools, organizations can identify inefficiencies, forecast

disruptions, and validate the provenance and circular attributes of procurement inputs, reducing risk and increasing transparency.

While technological adoption requires upfront investment and organizational change, the long-term payoff is substantial. Digital procurement platforms create the infrastructure needed to scale CP practices from isolated pilot projects to enterprise-wide strategies, making circular procurement both achievable and scalable.

Technology act as an enabler of strategic integration of circular economy principles, from cost savings to logistics optimization, innovative partnerships can bring to the table a skillset and an expertise that is unparalleled among larger companies (Veleva and Bodkin 2018). While larger companies are more fit to scale up their solutions rapidly, human-sized structures can provide better customer service and greater flexibility, values that are central in their offering and value proposition (Veleva and Bodkin 2018).

3. Methodology

3.1. Methodological approach

The methodology chosen for this research is configured as an exploratory qualitative investigation, aimed at gaining a deeper understanding of the range of barriers and opportunities that companies encounter in circular procurement. The goal of this analysis is to define the decisions made both upstream and downstream of the adoption – by representatives of the productive sector at different levels – of policies that guide purchasing activities and choices according to circularity principles and parameters.

This purely exploratory approach is based on nine semi-structured interviews conducted in person during the international ChangeNOW fair, held in Paris on April 24, 25, and 26, 2025. The event was attended by 40,000 people, including 10,000 entrepreneurs and managers from multi-localized companies and multinationals representing 140 countries around the world. The ChangeNOW initiative, as stated in its "manifesto", aims to bring together entrepreneurs, professionals, citizens, and artists to collaborate in seeking pathways to address the greatest environmental and social challenges of the century. The event attracts the most innovative minds globally and involves the leading figures in sustainability in the development of solutions for the planet.

Given the scale of the organization, the breadth of sectors involved, and the high level of dialogue generated, the ChangeNOW fair represents the most promising setting for launching the investigation at the heart of this research.

This event provides a highly qualified context, attended by operators and stakeholders actively engaged in the ecological transition, with particular attention to sustainable innovation, the regeneration of economic models, and business strategies focused on environmental responsibility. The environment of the fair is dynamic and informal, but the degree of relationship-building and the intensity of exchanges that occur created an ideal situation. Within a framework of highly professional and deeply circularity-focused interactions, the fair enabled direct and dynamic engagement. Privileged opportunities for dialogue emerged, and through the interviews, it was easy and spontaneous to access unfiltered, firsthand information about sustainability and circularity practices, information not curated or produced for media or public relations purposes. Thanks to the environment fostered within the fair, the relationships established were informal and centered on practical engagement. The atmosphere created within the pavilions of ChangeNOW is very relaxed. For this reason, the interviews were

conducted spontaneously, without prior notice to the interviewees and without sharing the questions in advance.

This methodological choice was deliberately made to avoid overly polished or institutionalized responses, to minimize the risk of "dialogical constructions" aimed at altering the actual state of affairs, and to more authentically capture information, data, perceptions, experiences, and the range of doubts that may arise when facing real barriers in day-to-day practice.

Interviewees were nonetheless informed that the information collected would be used for research and publication purposes, although in some cases anonymity regarding individual and company identities was guaranteed.

This assurance of anonymity allowed for the collection of even more candid and unfiltered data, particularly regarding the critical issues that emerged during the conversations. For example, some of the weaknesses mentioned include misalignment between a company's strategic objectives and the operational constraints it encounters in practice, internal resistance within the organization due to various causes (human factors, contextual difficulties, etc.), regulatory shortcomings that complicate the operational landscape, or slow and/or unresponsive dynamics within the supply chain.

3.2. Sampling

The nine interviewees were selected through purposive sampling. The dual objective in selecting participants was to ensure both the relevance of their testimony and the pertinence of their contribution in relation to the research objectives.

With regard to the relevance of the testimony, several parameters were applied both in relation to the target subjects of the interviews and in relation to the stakeholders involved.

The first criterion used to guide the selection was the professional role held by the interviewee during the fair. Seven out of the nine interviewees hold senior positions within complex corporate organizations, with roles and responsibilities as senior managers or executives, specifically in the fields of CSR, sustainability, or environmental and biodiversity matters. These roles include, for example, CSR Directors, Sustainability Directors, or Environmental Prevention Directors: managers and/or directors with extensive experience in the circular economy and in industrial and economic hubs where industrial symbiosis is implemented.

Specifically, of the nine interviewees, more than half, five to be exact, hold executive roles specifically in CSR, with job titles such as CSR Director and Senior Manager. One interviewee

is a Senior Manager with the role of Sustainability Director. One is a director with executive functions.

Finally, only two are in mid-level positions: one of them has responsibilities in sustainability and CSR, and the other specializes in Eco Design.

The second, and no less important, criterion used to assess relevance was the size of the companies involved. The sample includes five large enterprises, two medium-sized enterprises, one medium-large enterprise, and one sectoral association functioning as a federation representing over 500 companies. Altogether, the nine entities interviewed have a combined turnover of €131.638 billion. The total number of employees in these companies is approximately 450,000, with a median of 5,000 and a mean of approximately 50,000 employees per company.

The European classification criteria were adopted as the reference framework for categorizing company size.

Among the six large enterprises, the size range is quite broad, from the smallest with 5,000 employees to the largest with 279,000 employees. The total turnover of the five large companies is approximately €130 billion, employing about 450,000 people in total.

The medium-sized enterprises interviewed comprise three companies, with a combined workforce of about 2,500 employees and a total turnover of nearly €420 million.

The sample also includes a sectoral association representing companies whose core mission is focused on reuse and circularity. While the association itself has the budget and workforce of a lean, agile organization, it represents 500 companies across France, and its director has a clear understanding of the industry challenges.

The companies represented belong to a variety of industrial sectors, including luxury, packaging, construction, education, telecommunications, lobbying, beauty and cosmetics, infrastructure, and logistics, and operate in different domains.

One-third of the companies interviewed, specifically two medium-sized enterprises and one large enterprise, operate within the luxury brand sector and its related value chain.

Although most of these companies have a multinational scope, only employees from their French branches were interviewed.

While this sample is not statistical nor strictly representative, it is sufficiently diverse to identify common patterns and differences in approach related to the nature of the enterprise, the sector, or organizational culture.

It was particularly interesting to observe the level of maturity in circular economy practices among such a varied group of economic actors—differing in size, industry, turnover, number of employees, and areas of operation.

The companies also differ in terms of their target markets. Approximately half of the interviewed companies primarily serve a B2B market, or the public sector. Among those addressing a B2C market, three target high-end consumer markets: wealthy, high-spending individuals interested in prestigious and rare products.

3.3. Interviews

The interviews (an English translation of the transcript is available in the appendix) followed a semi-structured format. The starting point was a framework of open-ended questions organized into main thematic clusters. Around these thematic clusters, the conversations unfolded, forming the core content of the interviews.

Below are the main themes around which the conversation was centered:

1. Barriers encountered during implementation (a deep-dive approach into critical focus areas);
2. The role of circularity in the decision-making process leading to the renewal or selection of new actors within the supply chain (an analysis of priorities within a broad-spectrum procurement strategy);
3. Concrete initiatives already implemented, under study or design, or currently in the testing phase (insight into real-world experiences and business cases);
4. Enabling factors and drivers (an open approach toward positive solutions and strengths);
5. The role of internal and external stakeholders (a contextual snapshot);
6. Medium- to long-term plans for implementing circular procurement practices (goals and projects).

This framework allowed for both comparability of responses and exploratory flexibility, enabling deeper investigation into themes as they emerged throughout the conversations.

All interviews have been conducted in French and had an average duration of about twenty minutes. The transcripts, available in the appendix, have been translated to English using Artificial Intelligence tools. They were primarily held in the early morning or early afternoon, times chosen to ensure a relaxed conversation with interviewees who were not rushed by lunchtime or the end of the day.

From an analytical standpoint, the interviews were fully transcribed and underwent thematic coding, supported by qualitative tools for content analysis.

Data analysis followed an inductive-abductive approach to identify emerging categories and recurring interpretive structures within participants' narratives.

Particular attention was paid to the following key elements:

1. The consistency between the declared strategy and the actual level of operational implementation;
2. The degree of maturity demonstrated by companies in adopting circular procurement;
3. The presence or absence of effective innovative organizational solutions or common structural obstacles;
4. The vision and perspective of procurement as a lever for circular transformation.

3.4. Limitations

The methodology is aware of its limitations. First, the small number of interviews and the non-probabilistic selection of the sample prevent any statistical generalization. Second, the lack of prior preparation by the interviewees, while ensuring spontaneity, at times partially limited the technical depth of the responses. Third, the trade fair setting, while favorable for networking and conducive to an atmosphere of openness and unfiltered information exchange, does not always guarantee optimal conditions for deeply reflective interviews entirely free from the risk of distraction.

Nevertheless, the strengths of the methodology lie in the exceptional strategic quality of the sample, the context that enabled spontaneous responses, the sectoral variety, and the ability to identify cross-cutting trends and recurring barriers. This approach therefore represents a first exploratory step toward building a more robust understanding of the feasibility conditions for adopting circular procurement at a large scale.

Moreover, the analytical data developed below may help systematically identify the levers that could enable broader dissemination of circularity practices in purchasing and corporate policies across an increasingly substantial sample of economic operators in real-world business contexts.

4. Results

The interviews aim at highlighting sector-specific as well as cross-sector challenges, barriers and opportunities to implementation of circular procurement strategies. Although sector-specific (e.g. construction, luxury, telecommunication, ….) and business-model-specific (e.g. B2B, B2C, B2G, …) challenges and opportunities have arisen, patterns and similarities can be observed in the sample. In the following section, key barriers to a large-scale implementation of circular procurement strategies will be analyzed in detail, alongside the concrete actions that CSR departments have already put in place to address the challenge.

4.1. Key barriers to implementation

Among the key barriers, 4 appear to be critical for most of the interviewees regardless of their sector of activity and their business model, namely: quality concerns, cost sensitivity, supplier readiness and market immaturity, and logistical complexity.

4.1.1 Quality concerns

Perceived quality is the customer's subjective judgement of a product and its specifications (Valarie A. Zeithaml 1988; Chi, Yeh, and Yang 2009; Bhuian 1997) and it is one of the items defining brand value (V. A. Zeithaml 2000). Several respondents have mentioned quality concerns as one of the main barriers to circular procurement. For instance, while interviewing Agathe Bailly from Diptyque, a luxury brand mainly famous for its fragrances, she mentioned the impossibility to get a "*black that deep only using bio-sourced or recycled materials*". As quality is perceived as one of the main brand component of luxury consumption (Husic and Cicic 2009), no compromise that might affect brand equity can be made in favor of eco-innovation.

Floriane Bimbert (Gainerie 91) noted that while recycled materials have historically been more expensive, market dynamics are changing rendering some recycled materials cheaper than the linear alternative, as their price also depends on supply and demand. Especially when it comes to high-end products, such as luxury packaging, integrating circular alternatives can be challenging due to technical feasibility and compliance testing. Though French businesses usually respond well to secondary material – given that the overall quality is not negatively affected – this does not seem to be a differentiating factor for some Asian clients.

An informal conversation with the Vice President for Circular Economy of the Accor Group in 2024 suggested that hotel guests tend to appreciate the group's recent shift towards refillable shampoo and body wash dispensers available in the room bathroom. These dispensers replace

the typical single-use plastic bottles and soap bars that can be generally found in hotel rooms without affecting the customer experience. Nonetheless, on some rare occasions, guests judge that the single-dose soap is superior to the refillable dispenser, for instance when there is not enough product in the bottle to meet their need for the whole duration of their stay. This aligns with findings, showing that the refillable shampoo and soap dispenser ranks first among the most appreciated green attributes in the hospitality sector (Millar 2010).

Building on the insights from Vinci's Director of Environmental Protection Isabelle Loubatieres-Guisard, quality concerns are some of the major barriers to real-life implementation of circular procurement. Not every kind of material can be reused or repurposed, often leading to their incineration with the purpose of generating energy (Loi AGEC, article 110, 2020). Although this solution is preferrable to landfill disposal, it is far from being the best one in the hierarchy of circular strategies, as it destroys material instead of preserving it. Even when the production of secondary materials such as recycled aggregates is technically possible, for industrial and manufacturing companies, it only makes sense to privilege secondary materials in their production process, if on the other side there is a demand. At the moment, adoption of these new materials is limited due to a lack of market pull. Isabelle points to a deep-rooted cultural barrier: clients, and more specifically public commissioners, often don't trust its quality, durability and long-term stability. Though these beliefs are unfounded, the use of new materials in construction is reasonably something to worry about, and it is the manufacturer's job to educate their target market about new opportunities, especially when the recycled product's performance is equivalent to the virgin material's one.

"But some clients perceive secondary materials as second-hand or lower-quality, which they assume means they are also cheaper. We need to change that perception."

The lack of demand inhibits circular innovation. When clients don't request, nor accept circular compromises (e.g. bio-based materials that don't have the same smooth finish as the virgin plastic material, recycled aggregates that haven't been tested on any 20-year-old building, etc.), producers lack the incentive to develop circular solutions and invest a sizeable budget to scale them. This mechanism sets up a feedback loop where low demand leads to low production and marketing expenditures, reinforcing skepticism and limiting the potential for economies of scale, thus keeping prices of recycled materials high and further discouraging large-scale adoption in favor of niche usages.

While quality perception of the products a company sells can have a great impact on purchase intention, most companies – and especially large ones – also need suppliers for all of their back-office operations. The same concerns don't necessarily apply to indirect procurement, but excelling in circularity on this aspect also has a lesser impact on the overall brand image. As a consequence, some companies are investing their resources into raw materials pooling to optimize their supply chain without compromising the overall quality of the output.

4.1.2 Price sensitivity

Price is known to be one of the main drivers of purchase intention (Chang and Wildt 1994; Herrmann et al. 2007; Levrini and Jeffman Dos Santos 2021; Yu 2023). Though some circular products, such as most bio-based materials, are currently more expensive than their linear alternative, this is not the case for every circular solution. Reuse, for instance, is one of the most effective ways to cut costs, while maximizing the utilitarian value of a product. Nonetheless, circular products are still seen as more expensive. Moreover, shifting to a circular business model calls, in most cases, for an operational restructuring, hence generating a high initial investment.

Alexandra Ferré, Director of CSR at Yves Rocher, pointed out that when it comes to logistics, closing the loop on certain activities, such as shipping the merchandise to a large network of points of sales and distributors will reduce OPEX in the long run, as less logistics equipment will be needed to expediate the orders, less waste would have to be disposed, and operations could be revised to decrease the time and storage space for logistics equipment in the stores. To achieve that level of efficiency, though, the company would need to bear a high initial investment to find new suppliers, purchase the new equipment, train the on-site teams to the new operations, and iterate multiple times to find the sweet spot that makes the new circular distribution system more efficient than the linear one.

> *"There is also an upfront cost to consider. We must approach this with a long-term investment mindset rather than comparing the unit cost to conventional linear-cost purchasing."*

A similar standpoint can be observed among those that make packaging and logistics solutions: Caroline Elisseche (Raja) stated that reusable packaging is more expensive than the single-use alternative, even though its longer lifetime offsets the initial cost. The contradiction lies in the short-term procurement mindset of many B2B buyers, doing tradeoffs and making decisions based on the unit price of a product rather than its lifetime value. Not only the upfront

investment in these purchases is taken into account, but also the potential inefficiencies that might derive from their usage, such as cleaning and sanitizing, as well as damages and losses of reusable packaging that never get returned or is rendered unusable by more than just its normal wear and tear.

At a much lower scale, as CMO of a startup working in the circular economy sector, I have decided to purchase reusable plastic cups for our networking events and trade fairs to avoid offering beverages such as coffee and water in disposable paper cups. When I pitched this idea to our CEO on April 4th, I compared the price of the 300 reusable cups pack (62,56€, hence 20,08 cents per cup) to the price of the 1,000 single-use cups pack (82,28 €, hence 8,23 cents per cup). Even though the initial investment is higher, approximately at the third rotation of the reusable cups, the cost-per-use becomes lower than that of the disposable cups. This, however, is only true when considering two – purely theoretical and fundamentally impossible in real-life – conditions: 1. the cost of human resources' time (and/or the potential effects on morale when a hyper-specialized team is assigned the task), water, soap and energy used to clean and sanitize the cups is null; 2. at the end of each event, we get to retrieve all of the 300 cups, with no damage or losses. Although this anecdotal example lacks rigorous quantifications such as labor and resource costs, and omits operational factors, such as the potential shift in morale of the sales team having to do chores at the end of a workday in a trade fair, it serves the pedagogical function to illustrate fundamental principles of circular procurement. While upfront investments may be higher when purchasing circular products, long-term and systematic adoption leads to usage maximization and might yield cost-efficiencies. However, the assumptions required to render the circular alternative economically advantageous (i.e.: no resource input, no effect on morale, and full recovery of the items) rarely hold in real-world scenarios.

This micro-level insight highlights the complexity faced by large corporations contemplating their transition towards a circular procurement model. Scaling transformation to multinational organization with millions of employees scattered all over the globe compounds critical challenges, from planning, resource allocation, and internal advocacy. It requires much more than just financial modeling, but a true change in organizational culture, procurement competencies, interdepartmental coordination, internal training, and day-to-day operations, all factors that heavily impact circular procurement and supply chain transformation (Pollice and Batocchio 2018; Xu et al. 2022; Qazi and Appolloni 2022).

In contrast to the previous observations, Laetitia Langlois, Sustainability Manager at ESCP Business School, highlighted that reduction and reuse strategies, especially for non-essential items such as promotional goods, can be financially advantageous. She implemented internal financial incentives, such as co-funding sustainable purchases (i.e. the price difference between a sustainable purchase and a traditional one is covered by the sustainability department), and found that reusing decorations, for example, not only reduces waste, but also cut costs over time. As Langlois observed, cost isn't always the driving factor in consumers' reluctance to adopt circular practices. In some privileged circles, reuse is sometimes perceived as an inferior or unnecessary option, leading to a cultural stigma. This insight supports the idea that resistance to change, in this context, is often rooted in lifestyle expectation and social signaling. Neves and Marques (2022) infer that more fortunate people are less prone to reuse the items they already have, hence discouraging the assumption that budgetary issues are the main barrier for these consumers to privilege linear solutions, in favor of reasons such as status and perceived quality.

While cost is undeniably a recurring factor cross-sector, and especially in the early stages of a circular transition, it is not universally applicable. Reuse, in particular, has been cited across sectors as a cost-effective and scalable circular solution, provided that clients, their procurement teams and suppliers are willing to change both their mindset and their metrics of value, putting the cost-per-use front and center of their financial trade-offs. When the cost of a closed-loop item is lower than its linear alternative, it is even seen as a lever for development of the sector.

4.1.3 Supplier readiness and market immaturity

While the vision for circular procurement is gaining ground, the infrastructure to support it is still developing, and remains fragmented and underdeveloped. Several respondents draw a clear distinction between their large legacy suppliers, seldom advanced on the circularity of their solutions, and small and innovative solutions that are natively aligned with circular economy principles. Though the topic of market fragmentation is a recurring one, the interviews reveal a nuanced and sector-specific view on the subject.

For some actors, such as integrators, distributors, or retailers, circularity heavily depends on their suppliers, as their expertise is not in manufacturing, but rather in selecting manufacturers that can bring value to their customer base. Romain Francon, Director of CSR for the Wholesale division of Orange, provided a telecommunication industry perspective on the matter. As refurbished electronic items are nowadays very popular among consumers, there is no major

quality concern on the demand side when it comes to secondary materials or spare parts being used for the final product. Nonetheless, the industry, quite advanced in comparison to many others, could now take a step forward and scale up their circular procurement model, especially with regard to reverse logistics, remanufacturing or modular design. That is why they are setting clear and quantifiable goals to increase the circularity rate within their operations: currently, approximately 8 to 9 percent of their equipment purchases are recycled every year, and their goal is to increase that to 15% by 2030. To achieve this ambitious goal, Orange is working on a case-by-case basis with each supplier for different procurement strategies that align with their objective. Although most of their suppliers are currently unprepared to offer a 360° approach to circularity, they are building the skills and developing the industrial channels in the proper locations to ramp up and industrialize the process. He claimed, for instance, that large global firms, such as Cisco, or Nokia still struggle to fully adapt their models to embed circularity as a key pillar.

"the real challenge is finding the right partners, building the right ecosystems, depending on the different types of procurement we deal with, and getting our main suppliers to evolve"

For logistics, for instance, the major players in the French market have a limited offering when it comes to new modes of transport that support circularity challenges. Logistics giants generally appear largely unprepared to support their clients' sustainability goals, although some outliers such as Colissimo and La Poste are starting to align their operations to circular logistics systems.

Startups remain the most qualified actors when it comes to circular innovation: not being overloaded by large-scale infrastructure and legacy business models grants them the agility to experiment with new service-based models and reverse logistics systems. However, their limited scale and financial resources often prevent them from delivering the high volumes that are considered a minimum requirement for corporate clients, thereby constraining market scalability.

Multiplying supply channels due to market fragmentation not only reduces the potential for economies of scale, but also causes inefficiencies in the supply chain. At the current stage of development, most companies find it hard to centralize their procurement network on one credible, vetted circular source, making the decision-making process time-consuming for buyers. For circular procurement to become the norm, it would be essential to concentrate the

market into fewer, but more structured actors rather than a scattered ecosystem of small providers.

Though SMEs and startups are ready to offer a service, their structure and scale is unfit to be relied upon exclusively. Meanwhile, traditional large-scale suppliers lag in transitioning their offering due to structural inertia, cost concerns, or perceived risks. The result is a discrepancy between demand of circular services and demand of these. Bridging this gap will require a reconfiguration of the buyer-supplier relationships, ecosystem development and coordinated procurement strategies.

4.1.4 Logistical complexity

One of the main key habilitating factors of circular economy is reverse logistics. Reverse logistics can be defined as "*the process of planning, implementing, and controlling the efficient, cost effective flow of raw materials, in process inventory, finished goods and related information from the point of consumption to the point of origin for the purpose of recapturing value or proper disposal*" (Rogers and Tibben-Lembke 1999). In sum, reverse logistics can be used to industrialize the process of returning items after their usage. The concept is not highly innovative per-se: evidence about trade-offs between returnable empties and disposable packaging in literature date back to the early 1900s, and since the value of the non-returnable packaging is negligeable compared to the value of the merchandise, the adoption of non-returnable packaging solutions has been considered cost-effective, especially for longer routes, over one century ago (Bennett and Stable 1963), because of the logistical complexities that what is now referred to as reverse logistics entails. The tables are now turning with an eye on sustainability. Although the value of the container remains slight compared to the value of the products it carries, the new shift is viewed as an opportunity to gain competitive advantage (Govindan et al. 2012). By leveraging reverse logistics mechanisms as a strategic tool to position the brand increasing its social image, while gaining insights on product returns, companies can turn the burden of mastering the skill of reverse logistics into a competitive advantage (Agrawal, Singh, and Murtaza 2015; Stock and Mulki 2009).

Although this barrier is tightly related to supplier readiness and market immaturity, this one has a greater focus onto the internal challenges that companies face when integrating circular supply chains.

Among the respondents, to a different extent, almost all of them mentioned logistical complexities as one of the key barriers for large-scale implementation of circular procurement

practices, and that is also due to the fact that it involves a wide network of stakeholders, including suppliers, partners, logistics operators, human resources, clients, and sometimes even clients' clients.

Several respondents have mentioned how reverse logistics calls for internal restructuring: it involves rethinking workflows, adjusting operational systems and management methods. It requires a full engagement of everybody involved in the strategic restructuring, from the C-suite to the warehouse operator.

> *"the operational implementation of circular solutions is never straightforward. […] For operational teams and logisticians, it always requires changes and complete revisions of existing processes. […] There is a significant logistical complexity that should not be underestimated.*
>
> *This complexity is perceived internally, which acts as a barrier. Teams know that initiating reuse will complicate the overall logistics loop, particularly in the beginning."*

Circular practices, such as backhauling (i.e. two-way transports based on the principle of routes and shipping times optimization to avoid trucks to travel empty) can support other sustainability challenges, such as those linked to biodiversity and climate, while reducing cost of transportation and waste management. Nonetheless, for backhauling to be a cost-effective solution, it is essential to have an upstream logistics planification that identifies the best times and places to capillary dispatch transport units.

Designing workflows for reuse, repair or refurbishment is resource-intensive, especially for large organizations: it requires a long-term vision, a designated budget and clear strategic objectives to justify the upfront investment.

For instance, Orange's efforts to increase circularity in network equipment relies upon predictable secondary resource and component availability. Not only a good ecosystem integration is essential, but the whole operation requires tight integrations between procurement, logistics and technical teams. If this alignment fails to prove its viability, reuse loops may collapse due to stockouts, quality mismatches, or delays corrupting the overall quality of the service provided.

This complexity is far from being solely technical: the implementation of reverse logistics demands a behavioral shift, role redefinitions, and requires staff at a cross-level and interdepartmental scale to rethink how value is created and flows throughout the supply chain. Rather than just a tactical adjustment, it represents a strategic transformation.

4.2. Strategic actions already implemented

Most of the respondents already had the chance to test, implement and scale some of the circular concepts mentioned above. In the following section, the focus will be on these concrete actions, to identify their enablers.

4.2.1 Internal training programs

It is widely accepted among respondents that one of the main levers for change is training and education. Skill-building and raising awareness on circularity has become a genuine lever to reshape procurement practices and account for a broader conception of value, integrating lifecycle thinking.

Several respondents claim that their companies have implemented educational programs specifically designed to train their procurement departments on subject such as responsible procurement and circular procurement. That is done with the main purpose of having more conscious buyers that can make procurement decisions based not solely on traditional factors, such as price and negotiation margins, but rather taking into account a broader value chain.

The expected goal of these programs is that buyers that undergo periodic CSR and circular procurement training will have a sharper toolset to perform cost-benefits analysis taking into account the long-term implications of their purchases.

Several respondents pointed out that training procurement professionals should be a priority, but everyone should be involved in this up-skilling project: on-site operational staff is just as concerned as any buyer when it comes to finding a purpose to their everyday, especially this becomes more complex due to an unwanted operational restructuring. Training becomes the vehicle of cross-departmental cultural alignment, where everybody speaks the same language and works towards the same goals.

"First, educating everyone about what circularity means, especially our procurement teams. They need training and awareness, and then we need to integrate circularity into our procurement standards as a formal criterion."

Training programs can also address the perception of risks and uncertainty, by educating professionals on the reasons and ways, sometimes, a circular option is simply better than its traditional linear counterpart. Training buyers to assess alternative materials based on their actual performance rather than their own assumptions, or to use Life Cycle Analysis tools to

compare two alternatives, seems essential in the shift leading to leave such deep-rooted attitudes behind.

Training is not the solution, but an essential tool to enable cultural and organizational transformation and achieve circular procurement goals.

4.2.2 Reuse and Product-as-a-Service as strategic catalysts for circular innovation

Out of the nine respondents, six have mentioned reuse as one of the main concrete actions already put in place: whether it is reusable packaging solutions, switching from property to usage through rental and take-back models, or pooling raw materials within the company, these applications of circular frameworks seem to be more mature, both in customer perception and for organizational smooth implementation.

Compared to other circular tools, such as reverse logistics and remanufacturing, both reuse and PasS can be implemented at a slower pace and scale, without compromising the overall existing operational frameworks, thus allowing companies to incrementally adopt circular practices.

For instance, Alexandra Ferré from Yves Rocher claims that, through intensive collaborations with store fitters and logistics professionals, reuse of store furniture is a common practice within their organization. Similarly, reusable packaging materials, both for final consumers and large B2B shipping is paving the way for a more circular logistic system.

Unlike reverse logistics, which requires system-wide reconfiguration, high upfront capital investments and new structural organization, reuse systems can be tested in controlled environments, iterated and scaled progressively. Moreover, they are often associated with limited financial cost, as a reused resource is normally cheaper than a virgin one, especially considering the cost-per-use. As reuse can be applied just as smoothly to non-customer-facing activities, such as back-office operations and logistics, these initiatives also entail a lower reputational risk in terms of quality perception.

Although it hasn’t been widely adopted by the majority of players yet, PaaS transitions offer a gradual shift from ownership to usage, allowing companies to maintain control over product lifecycles, while diluting the cost (or extracting the value, depending on the demand/supply perspective) overtime. Overall, in comparison to more complex circular applications, PaaS requires less disruption and enables a more transparent ROI tracking, especially in a B2B context. This approach effectively balances ambitions with practical feasibility, paving the way for more complex systems.

4.2.3 Strategic integrations

Most companies, and especially the larger ones, have a very structured sustainability and strategic planning, with specific and measurable goals, action plans, and roadmaps.

This litmus test provides guidance and active alignment of day-to-day operations to the overall strategic objectives. Circular strategies appear to be central in these long-term policies for sustainable development.

Vinci, for instance, has developed its own recycling and waste-recovery channels, allowing closed-loop systems where waste and byproducts become raw materials for secondary products.

> ***"This is a real strategy—turning a constraint into a business opportunity.*** *When we managed to produce materials of the same quality as natural ones, we met the challenge successfully."*

This decision stems from the second of the three pillars on which lies their long-term sustainability strategy, namely:

1. Taking action on climate change by reducing our carbon footprint;
2. Optimizing resources through circular economy practices;
3. Preserving natural ecosystems.

Operational decisions are driven by the long-term strategic goals also for Yves Rocher, which in the medium- to long-term is prioritizing the implementation of closed-loop logistics systems to reduce waste and the identification of reuse solutions for waste generated by operations, particularly pertaining materials from store shutdowns and product packaging. Although they lack a specific set of circular procurement guidelines, they are fully integrated into their responsible purchasing policies.

Orange's ambitious goal of achieving net zero by 2040 is supported by several pillars, among which circular procurement is the foundation of a specific program that they actively promote and for which they have undergone operational restructuring: they are educating their resources, extensively working with operators at all levels, to anticipate new challenges and minimize risks. Building expertise on the subject is thought to be a key mean to achieve these goals effectively.

On a broader level, strategic directions play a key role in the shift towards an innovative business model, especially when profitability might be at risk. Internal incentives can bridge the gap between the perceived value of an initiative and the setback in cost-effectiveness. ESCP

Business School's sustainability department, for instance, covers the cost differential whenever possible, to encourage other departments to select a more eco-conscious alternative.

The interviews clearly exemplify how for most companies, and particularly strategically mature ones, circular procurement is not a standalone initiative, but an underlying component of their broad sustainability strategy. Circularity is often framed as a strategic and operational lever for resilience, differentiation and innovation, strengthened by measurable targets, long-term strategic design and structured roadmaps.

5. Discussion

5.1. Barriers

5.1.1 Quality concerns: a cultural and social barrier preventing large-scale implementation

Although quality seems to have a positive impact on purchasing decision of eco-designed products (Parikka-Alhola 2008), this mediating effect can't be generalized to all circular solutions. Second-hand and recycled or remanufactured products and materials are considered of lesser quality compared to mainstream virgin alternatives.

Perceived quality is the subjective judgement of a product's features and its superiority to similar products, which is different from its objective superiority (Valarie A. Zeithaml 1988). Extensive research shows a correlation between perceived quality of a product and purchase intention (Bou-Llusar, Camisón-Zornoza, and Escrig-Tena 2001; Saleem et al. 2015; Hanslim, Jaya, and Prasetyawati 2020), as well as between perceived quality and brand image (Calvo-Porral and Lévy-Mangin 2017; Severi and Ling 2013). This aspect is particularly pronounced in luxury (Liu et al. 2017; Kumagai and Nagasawa 2023; Lou et al. 2022), but affects, though to a different extent, every company dealing with secondary materials and products.

As customer demands are the main driver for companies to innovate (or not) their value proposition (Bohlmann et al. 2013), integrating secondary material into the final product is believed to negatively affect the perceived quality of the provided goods and services, and as a consequence purchase intention.

The underlying reason of the perceived inferiority of remanufactured products is often cultural and sociological: secondary products and materials are perceived as recovered waste, and some people, especially the least price-sensitive ones, are not willing to accept this compromise. Nonetheless, remanufactured products have undergone disassembling, repair of damaged spare parts, replacement of parts that have been damaged beyond repair and reassembling (Aydin, Kwong, and Ji 2016; MacDonald and She 2015; Hazen et al. 2017) to mimic like-new conditions of the product. Consumers don't perceive this quality level and this misalignment between actual quality and perceived quality pushes them to adjust their purchasing behavior accordingly (Wang and Hazen 2016; Hazen et al. 2012; Hazen, Cegielski, and Hanna 2011). As a consequence, their willingness to pay is also affected. In several interviews, quality concerns have been mentioned among the barriers and perceived risks that prevent companies to embark in circular transitions. Although the respondent's attitude is generally in contrast with

this misconception, their professional opinion mirrors the organizational policy and target market.

Quality concerns may also have to do with the long-term durability of secondary products. As secondary and grey markets aren't normally associated with prime customer service, reluctancy in purchasing secondary materials can also be justified by different circular approaches, such as repairability and longevity (Cao and Zhang 2020).

To decrease the reputational risk of quality concerns and their negative effect on purchase intention, first movers have the hard job and responsibility to advocate for their solutions and showcase their success stories. The telecommunication industry, for instance, far more mature than most sectors when it comes to refurbished and remanufactured products, does not seem to be affected by this barrier, suggesting that with market maturity also comes a lift in consumer quality-related concerns.

5.1.2 Price and cost analysis: the role of nudging and incentive systems

Connected to perceived quality is the concept of perceived value. Similar observation regarding the price-points of circular products can be made, as customers expect these items to be quite inexpensive. Either way, their perceived value is often judged lower than that of the linear alternative, because of a perceived mismatch between the quality and the price point (Wang and Hazen 2016).

In some cases, circular products are actually a lot cheaper than their traditional counterpart. This is namely the case for most second-hand, and remanufactured products: that is because remanufactured products require much less resources than initial production: the remanufacturing cost can range between 40 % to 60 % of the production process and only requires 20% of the work effort (Guide, Jr. and Li 2010). Remanufactured items can therefore be sold at a much lower price point than the new product version of the same item.

Nonetheless, circular manufacturing is not always cost-effective: some circular alternatives, such as reusable and eco-designed products require a higher upfront investment, but this will eventually be offset by the higher lifetime value of the product. The cost-per-use therefore makes the circular solution economically viable in the long-run.

Other solutions, such as certain bio-based materials, are simply more expensive than a plastic-based alternative. These materials can bring a higher value to eco-conscious consumers, therefore being used for marketing and branding purposes, but their operational viability is still to be improved.

Another aspect that the interviews pointed out is the initial expenditure allocated to strategic restructuring, which entails a highly capital-intensive investment and a multi-stakeholder approach. Making circularity a priority demands a vast adoption within the company by every party involved, to ensure the success of such a transition, resources need to be trained, upskilled and sometimes reskilled. Although upskilling and reskilling are essential practices to keep the workforce updated to new industrial trends, especially at a time when technology advancements move faster than ever, the process is time-consuming and resource-intensive, discouraging companies from adopting organization-wide training processes (Li 2024).

Financial incentives prove to be the most effective enablers of circular practices: as pointed out in several interviews, whenever a circular product of comparable quality is more advantageous than its linear counterpart, the decision is a no-brainer. This also seems to be the case for circular purchases that, at a slightly superior cost, can be leveraged to gain competitive advantage.

When it comes to end-of-life, granting a financially attractive model for owners of unwanted products in a circular way has proven effectively (Veleva and Bodkin 2018): for instance, providing a company owns an item that it does not need anymore, landfill disposal (or other end-of-life treatments) are costly, donating the unwanted items not only eliminates that cost center, but in many countries it is also associated to fiscal benefits deriving from donations. This acts as an incentive for companies to donate, which not only preserves the material flows for a more conscious disposal method, but also creates social and societal value.

5.1.3 Supplier readiness: the market is still lacking a unified platform capable of addressing diverse and broad circular needs

Although large organizations tend to rely upon equally large suppliers to simplify economies of scale and efficiencies, their rigid infrastructure makes them incapable of addressing circular challenges at scale.

The lack of a one-fits-all infrastructure tends to be problematic for companies wishing to integrate reverse logistics and circular procurement practices. As returns and second-life solutions are often based on availability, intent purchases may fall behind.

This is a major challenge both in B2B and B2C settings, as clearly stated by Corrot and Nussenbaum (2023): CatchOfTheDay (or simply Catch) is an Australian e-Commerce founded with the intention of decommissioning products, consumers would browse the website looking for deals – their catch of the day – and sometimes would leave disappointed and empty-handed as the products for sale would belong to categories that just did not match their needs. Catch

had limited storage space and could not expand their offering as much. This eventually evolved into a marketplace, ensuring that every customer could satisfy their need, even though it lost its original identity of a platform for decommissioned goods.

The same can be applied to construction materials: if a certain byproduct is needed to generate circular raw materials to be used in a construction work, the unavailability of said byproduct might endanger the planning and roadmap for construction. This risk can't be borne by companies that work on a tight schedule.

Although they are working to build the proper expertise, many legacy suppliers are slow at integrating satisfying circular solutions, which is a major barrier to implementation for all of their downstream clients.

As the full transition to a circular economy requires highly innovative solutions, this stage of development is nonetheless essential to exploit the full potential of small companies' agility, iterate faster and scale the most efficient solutions (Veleva and Bodkin 2018). These businesses are unready to address global challenges, but they are more prone to test, fail, and learn: a natural selection process that will eventually select the best iterations needed to make circular economy companies' first choice.

Market fragmentation not only makes it hard to properly identify the best suppliers, but also reduces the negotiation margins that are normally granted when economies of scale occur. Moreover, from a logistics and back-office perspective, it requires a multiplication of accounts to manage, with the relative accounting, logistics and procurement teams. A large plethora of small suppliers calls for inefficiencies and logistical complexities all along the value chain. Once the most valuable solution will emerge, it is safe to assume that the market will get more concentrated to increase bargaining efficiencies.

5.1.4 Reverse Logistics: a burden carried by both companies and consumers

Reverse logistics is possibly one of the major barriers to scalable circular solutions, because companies, and especially established ones, lack the infrastructure to industrialize this process (Agrawal, Singh, and Murtaza 2015).

Some businesses have started to offer buy-back programs, allowing their customers to return old products for free or in exchange for a discount or a voucher to spend at the store. Although these initiatives are noble, their scope will never increase exponentially if the responsibility solely relies on the final consumer. For instance, IKEA has recently launched a new "second life" program, allowing to consumers that wish to purchase an IKEA product to get a vetted

second-hand option, and to those that wish to replace their furniture to get a partial refund. For a product to be eligible for the buy-back program, though, consumers wishing to sell their items need to bring them in one piece to the store (IKEA 2025), making it quite uneasy on any customer that wants to decommission any large piece of furniture, such as bookcases or box springs. Purchases of these items follow the same structure: the services that are normally provided to customers purchasing a new IKEA product, such as delivery or assembling, are not provided for the second-life line. These complexities seem designed to disincentive customers to privilege the second-hand option, especially for a company that relies heavily upon its expertise in fitting large furniture items into a few regular-sized boxes that can be easily shipped. And yet, this in-person assessment of the second-hand item is also essential for IKEA to limit their responsibility and prevent further returns in case a visibly damaged product is considered not appropriate by clients hunting for bargains.

Ecosystem immaturity, as well as lack of clear return policies are a major factor influencing the ineffectiveness of reverse logistics implementation (Janse, Schuur, and De Brito 2010).

Network design, including recycling, reuse, remanufacturing, repairing and secondary market networks, has a strategic role, theoretically enabling or disabling the potential for reverse logistics in real-world scenarios (Agrawal, Singh, and Murtaza 2015).

5.2. State-of-the-art situation

5.2.1 Education and training as a key factor for circular procurement scaling

Among the respondents, several companies have stated that training and educational programs are front and center in their circular procurement strategies. By upskilling their purchasing teams, they intend to increase awareness among those that eventually need to operate the final trade-offs. This is a paradigm-changing shift, empowering long-term circular strategies (Kristensen, Mosgaard, and Remmen 2021; Patel et al. 2021; Cruz Rios, Grau, and Bilec 2021; Qazi and Appolloni 2022).

It is acknowledged in literature that training procurement officers in matters such as sustainability and circular procurement have a positive effect on behavioral changes in favor of circular practices (Xu et al. 2022).

Among decision-makers, top management support is a great mediating factor that has a direct influence on the effectiveness of such environmentally-oriented training programs (Sarkis, Gonzalez-Torre, and Adenso-Diaz 2010).

5.2.2 Circular procurement as a strategic imperative

Circular economy represents a transformative shift in how value is created and sustained (Ellen MacArthur Foundation 2013). For businesses, it is not merely a compliance or sustainability issue, but a strategic imperative for long-term competitiveness in an increasingly resource-constrained and environmentally conscious global market (Witjes and Lozano 2016).

Despite the significant obstacles (i.e.: organizational inertia, market immaturity, infrastructural gaps, etc.) circular procurement is far from a theoretical ideal. It represents a pragmatic, cost-and-opportunity driven strategy that enables organizations to thrive in a resource-constrained, volatile world. The compelling case for CP rests not only on sustainability ethics but on hard economic logic: lowering total costs, diversifying supply risk, innovating business models, and accessing the rising tide of regulatory and financial incentives.

That is why, when top management is involved in setting the milestones and the strategic objectives, the effectiveness of these strategies is far better and long-lasting (Dubey et al. 2019).

Success in circular procurement demands deliberate leadership, organizational transformation, cross-functional collaboration, and investment in new competencies and technologies. Those organizations willing to embrace these challenges will position themselves at the forefront of a procurement revolution: one that builds resilient, efficient, and future-ready supply chains. In this light, circular procurement is not a distant aspiration but an accessible and promising pathway toward more sustainable and profitable business practices.

5.2.3 Reuse, Product-as-a-Service, and other plug-and-play circular practices

Although every business model restructuring is tied up with enormous complexity, some circular initiatives are simply easier to implement at a lower scale for pilot tests. For instance, although remanufacturing can sensibly increase margins (Guide, Jr. and Li 2010), the structural characteristics of the remanufactured product need to be tested according to the compliance standards demanded by the law or the market, which requires per-se a sizeable investment, employees need to acquire the skills to adapt their production process and be trained on product specifications. Pilot tests can last several years before ending up with a marketable solution, and the perceived quality of these items may not be welcomed by the market.

Other solutions, such as reuse and Product-as-a-Service can be adopted to run back-office operations, thus reducing the negative impact on brand image and perceived quality.

When benefitting from servitization on the demand side, clients get to evaluate their actual need to go further and make a purchase, without having to commit in a highly capital-intensive decision before having tested; at the same time, on the supply side, the same item can serve a wider clientele, one that would not normally purchase the product due to elasticity of demand highly influenced by its price. PaaS can therefore serve as a price discrimination factor, increasing market shares on a newly addressed target (Hidalgo-Crespo et al. 2024).

5.3. Opportunities for further development

5.3.1 Innovation and startup collaborations

Several respondents pointed out how though the ecosystem lacks the maturity and structure that they expect from their broader network of suppliers, some niche solutions that are natively designed for circularity have arisen, and – though the scale-up potential is limited – the innovative products and services that they bring to the table is highly satisfactory for their needs.

While suppliers with whom they have had long-lasting relationships are currently unprepared to approach these challenges with the same effectiveness as their usual service-level, and offer standardized solutions that might not fit with the operational challenges of the clients, the agility provided by these innovation-driven actors, as well as their limited bargaining power, grants corporations the chance to do test-runs on new circularity applications, specifically tailored to their needs.

These circular providers, although limited in capacity and often lacking the organizational infrastructure to serve large accounts at a company-wide extent, are cherished for their lean process design and their responsiveness.

In logistics, for instance, both Alexandra Ferré from Yves Rocher and Caroline Elisseche from Raja emphasized how reusable packaging and circular logistics services are hardly as developed among legacy providers as they are in smaller human-sized companies.

> *"We're seeing **startups and new companies emerge with innovative business models** specifically built around circularity. These are the partners we tend to work with when implementing circular models."*

These companies, not having found the best way to turn circularity into a strategic must-have for companies are fundamentally more inclined to adapt their value proposition and iterate the model together with their clients, whereas organizations with an established business model and infrastructural operations governed by rigid processes are more cautious about the innate

risks both in terms of quality downfalls, leading to brand image, and operational restructuring. Despite the limited capacity, these partnerships serve a crucial role in a developing ecosystem: they provide proofs of concept to accelerate internal learning and act as catalysts to offer a tangible path forward, allowing the market to evolve and structure itself.

5.3.2 Client pressures

Client demands will always be the main driver for companies to innovate its value proposition. Especially, but not exclusively, in sectors where the client is not willing nor ready to accept a compromise in service level, client pressure may be lagging compared to the general market trends, only wishing to accept the innovative solution once it has been duly vetted, improved and optimized for their needs. This is the case for most luxury businesses, or long-term investment such as infrastructure and construction.

Progressive use-cases and success stories can be used as proof of viability to derisk – or reduce the perceived risk of – the integration of innovation, according to Caroline Elisseche from Raja.

This perspective is particularly interesting because, though clients may be worried about potential failures of circular practices, other stakeholders, such as the shareholders are actively pushing the company to stay competitive in this area. This misalignment exemplifies how demand of circular products is expected to rise in the upcoming years, and the initial investment will be justified once it scales up.

In the luxury sector, it is hard for suppliers to lead the change when their bargaining power is so limited compared to that of their clients, according to Floriane Bimbert. When it comes to sustainable innovation, this can be at the same time a driver for improvement, and a barrier to innovation. Most clients have specific suppliers' codes of conduct and require their strategic partners to align to standards and procurement policies, thus driving sustainable innovation. For instance, Gainerie 91 was pushed by one particular client to switch from nearly 100% plastic materials to mostly bio-based and recycled materials. At the same time, well-established actors may not be as receptive as smaller or less brand-reliant businesses to disruptive and riskier innovations.

*"We rely heavily on **client pressure**. That's what drives change."*

Ultimately, these dynamics highlight the two-fold role of clients in the circular transition. They are both enablers and gatekeepers: they set the pace and the ultimate direction through their purchasing decisions.

5.3.3 Long-termism and cost effectiveness

The interviews clearly suggest that although circular procurement often implies a sizeable upfront cost and increases in initial complexity, the underlying understanding is that long-term benefits will offset the initial struggle. This perception is particularly observed in organizations with a more mature strategic approach to circularity and sustainability. When it comes to logistics, for example, several respondents, among which Alexandra Ferré (Yves Rocher) and Romain Francon (Orange) observed that although closing loops requires an extensive initial investment, it will improve operational efficiency in the long run, eventually lowering lifecycle costs.

This long-termism view is shared by companies such as Vinci and ESCP, which are already including circularity into their strategic roadmap, even though short-term profitability might have a temporary setback.

Some capital-intensive investments, such as Vinci's closed-loop recycling infrastructure and Orange's investment in circular equipment targets are leading examples of transformative organizations willing to absorb early costs in pursuit of long-term profitability and reduced environmental impact.

Moreover, as demand for circular products is rising, their price is becoming more and more competitive in comparison with the traditional linear alternative. Recycled and bio-based materials, once largely more expensive than their virgin alternative, are now shifting towards a more cost-effective positioning, especially when the full lifecycle cost, which includes storage and maintenance costs, waste treatment, emissions and regulatory risk, is taken into account. This phenomenon, still at its early stages of development, cannot be generalized for every product category, but represents a step forward into the potential of economies of scale in the circular ecosystem.

Though regulation plays a role in defining priorities, most large companies are mainly driven by their own strategic plan and stakeholder pressures, aiming at anticipating regulatory challenges, and potentially influencing the legislative process by serving as the poster child for successful implementation of eco-conscious practices.

6. Conclusions and recommendations

While companies have not yet fully integrated an organization-wide approach to circular procurement, the steps are in motion, as it is perceived by decision-makers as a potential source of long-term competitiveness. This study reveals a growing strategic orientation in top management who increasingly see circular economy practices and circular procurement as a pathway to sustainable value creation.

The insights gathered highlight the importance of a paradigm shift, where procurement goes beyond short-term cost-efficiency.

The purpose of this research was purely exploratory. It serves to illustrate the complex and multifaceted nature of circular procurement strategies and their integration in the organizations. It provides a general understanding of drivers, barriers and opportunities, as well as a concrete approach that considers the steppingstones for firm-wide circular procurement scaling.

Although systemic implementation is far from being achieved, the positive trajectory suggests optimistic applications of this path.

Future research could build upon these exploratory findings to further analyze the sector-specific context, with a particular attention to industries that have had several decades of widespread adoption, such as telecommunication, and those that just recently started to question their supply chain, such as luxury.

7. Appendix: interviews

N.B.: these interviews have been conducted in French, this translation has been made by an artificial intelligence tool.

7.1.1 Isabelle Loubatieres-Guisard – Vinci

Isabelle: I am the Environmental Prevention Director for the Roads Division of Vinci Construction in the Southwest region.

Giulia: What are the main obstacles you face when trying to integrate circular principles into your procurement?

Isabelle: I personally do not handle a large volume of purchasing, but one major challenge is the issue of standards. This is the main barrier in our field because the products we use must comply with strict standards. Therefore, those standards must allow for the use of materials derived from the circular economy. Additionally, our clients—most of whom are public authorities—must also agree to use these secondary materials.

Giulia: This brings us to the second question. To what extent does regulation influence your decisions on sustainable procurement?

Isabelle: Regulation is not our main driver. I work for a large group, and our actions are primarily shaped by corporate policy and the desire to differentiate ourselves from the competition, rather than by regulatory obligations.

Giulia: How important is circularity when selecting your suppliers?

Isabelle: Price remains the top criterion when choosing suppliers. However, if we identify an opportunity to stand out from competitors by offering environmentally friendly alternatives, then we are willing to pay a bit more for materials that originate from the circular economy.

Giulia: Are your suppliers generally prepared to offer circular solutions?

Isabelle: Generally, yes. But for example, I recently reviewed packaging solutions, and when we challenge suppliers on the entirety of their product offering, we often find that their approach to packaging is underdeveloped—it is simply not a priority for them. So yes, there is progress, but much remains to be done. Often, the proposed solutions are still too expensive—the pricing is very discouraging.

Giulia: You mentioned working for a large group. Are there internal mechanisms in place to adopt circular procurement practices?

Isabelle: Absolutely. We have more than just incentives—we have defined challenges and quantifiable objectives supported by specific indicators. We report these metrics to our shareholders. Our commitments include reducing the volume of waste we generate. We have goals related to both minimizing and valorizing waste.

Giulia: Has the CSRD encouraged you to go further in this direction?

Isabelle: In fact, we had already set ambitious goals before the CSRD. What the CSRD did change was that it pushed us to make our indicators more robust. And even if there's some uncertainty now, we decided to maintain our momentum. We're not going to be swayed by hesitation, especially since we're in France and our competitors are likely to do the same. So there is reason for optimism.

Giulia: What are the risks associated with circular procurement?

Isabelle: Personally, I don't see any real risks. But some clients perceive secondary materials as second-hand or lower-quality, which they assume means they are also cheaper. We need to change that perception. If you visit our booth, I can show you recycled aggregates—they look exactly like natural ones. So our aim is to demonstrate to our clients that using secondary materials carries no risk, especially since we produce them ourselves.

Giulia: In your view, what are the most effective levers to promote the adoption of circular practices by businesses?

Isabelle: Setting clear and measurable objectives is essential. And it's also important that our clients challenge us on these issues, as we depend on them heavily. If they push us, we will rise to the challenge.

Giulia: You mentioned circular practices—have any already been implemented?

Isabelle: Yes, of course.

Giulia: Are they part of internal long-term strategic policies? What are their goals?

Isabelle: Like all companies, we generate three types of waste. The one we generate the most is inert waste. For that, we have established our own recycling and recovery channels, allowing for closed-loop systems on some worksites.

This is a real strategy—turning a constraint into a business opportunity. When we managed to produce materials of the same quality as natural ones, we met the challenge successfully.

Our next major challenge is optimizing the recovery of non-hazardous waste (plastics, metals) and hazardous waste. While progress has been made, more needs to be done. These are exactly the kinds of solutions I am looking for today.

Giulia: If you're interested, I could introduce you to a company that does exactly that.

Isabelle: Oh, do you know Urbyn?

Giulia: Yes, I do know Urbyn, but I wasn't referring to them. Moving on, are circular procurement practices aligned with Vinci's overall strategy?

Isabelle: Actually, at Vinci, we have three strategic pillars:

1. Taking action on climate change by reducing our carbon footprint;
2. Optimizing resources through circular economy practices;
3. Preserving natural ecosystems.

When we implement circular economy solutions—often on our worksites—we reduce transport emissions through backhauling, thereby lowering our carbon footprint. In doing so, we protect natural habitats and avoid filling landfills. Circularity directly supports both our environmental and climate objectives. Thus, the second pillar helps fulfill the goals of the other two.

7.1.2 Célia Renesson – Réseau Vrac et Réemploi

Célia: My name is Célia Renesson, and I am the Director of Réseau Vrac et Réemploi, a network that brings together 500 companies in the bulk product sector, particularly focused on packaging.

Giulia: In your opinion, what is the main obstacle to integrating circular practices into your procurement?

Célia: I would say the primary obstacle is knowing where to source from in order to avoid multiplying supply channels. If everything could be found on a single platform, that would be ideal.

Giulia: Does regulation support or hinder these efforts?

Célia: In my view, regulation encourages companies to improve and adapt their practices.

Giulia: To what extent is circularity a factor in your supplier selection?

Célia: It is fully embedded in the DNA of our organization. Every choice we make is carefully evaluated to ensure that we work with sustainable suppliers.

Giulia: Are your suppliers ready to offer circular solutions?

Célia: Yes, because we select our suppliers specifically with this goal in mind.

Giulia: Does your organization have a formal policy to incorporate sustainable procurement practices?

Célia: Yes, it is included in our charter and in our internal regulations.

Giulia: What risks do you associate with circular procurement?

Célia: I would say the perceived risks are: higher costs, difficulty in easily identifying suppliers, and concerns about achieving the same level of quality as with non-circular products.

Giulia: Are those concerns justified?

Célia: No, of course not. But they are part of the misconceptions we need to challenge in order to change mindsets.

Giulia: In your view, what are the most effective levers to accelerate the adoption of circular practices by businesses?

Célia: For me, the first lever is regulation that sets specific objectives. Without objectives, companies will continue doing what they already know. The second lever is having a clear and reliable supply offer for circular procurement, supported by appropriate guarantees.

Giulia: What circular practices have you already implemented concretely?

Célia: Currently, all of our office purchases are delivered in reusable packaging.

Giulia: Are circular procurement practices aligned with your company's overall CSR strategy?

Célia: Absolutely. It's fully integrated into our DNA, so it happens naturally.

7.1.3 Alexandra Ferré – Yves Rocher

Alexandra: I am Alexandra Ferré, Director of CSR at the Yves Rocher Group.

Giulia: In your opinion, what is the main obstacle encountered when trying to integrate circular economy principles into procurement?

The main obstacle is cost and operational feasibility, particularly in terms of logistics.

Giulia: To what extent does regulation influence your decisions regarding sustainable procurement?

Alexandra: Regulation encourages us to adopt more reuse practices in two key areas:

1. The offering of reusable products, especially in relation to deposit schemes and in-store reuse;

2. The new Extended Producer Responsibility (EPR) framework, which applies to industrial and commercial packaging—particularly concerning the procurement of crates, cartons, etc.—thus impacting industrial logistics and transportation.

Beyond that, in broader procurement terms, there are additional requirements related to the duty of care, risk management, and legal compliance, including traceability. However, for now, these have not fully pushed us, operationally speaking, toward reuse.

Giulia: To what extent is circularity an important criterion in the selection of your suppliers?

Alexandra: That depends on the type of supplier. For indirect purchases or service providers, there are not really specific criteria. In other categories, it varies. For logistics, it depends on whether a project is dedicated to that objective—for example, changing modes of transport to achieve circularity goals. And that is currently underway. In other categories, it is more difficult; some suppliers do not yet offer reuse solutions or are not concerned with this issue in their value proposition.

Giulia: Are your suppliers generally ready to offer circular solutions?

Alexandra: Our current suppliers—not really, but that's beginning to change. La Poste and Colissimo, for instance, are working on circularity in parcel delivery. Major players are starting to move, but it's not mainstream yet. Today, it's mostly smaller companies, which are inherently built around circularity, that are capable of offering a full 360-degree value proposition in this area.

Giulia: Are there internal incentives to adopt circular procurement practices?

Alexandra: Not necessarily for circularity specifically, but certainly for responsible practices. We evaluate suppliers on several criteria, including CSR indicators, during tenders or when qualifying new suppliers. Circularity is considered, but it still depends heavily on the supplier category.

Giulia: What circular procurement practices have you already implemented?

Alexandra: We purchase upcycled materials, both for raw materials and for logistics purposes. We ensure reuse strategies are applied to end-of-life elements from our stores, working with shopfitters to encourage reuse. In logistics, in some countries, we have introduced closed-loop systems using reusable containers, for example.

Giulia: Are these practices governed by company policies or internal objectives?

Alexandra: Yes, we have a responsible procurement policy that defines what we buy, how we buy, and from whom we buy. This policy originates at the corporate level and is then translated into operational criteria for buyers.

Giulia: To what extent are circular procurement practices aligned with the company's overall CSR strategy?

Alexandra: They are a part of it. Responsible purchasing is fully integrated into our strategy and is covered by our internal policies. Circular economy practices are included under the umbrella of responsible purchasing, depending on the relevance to each procurement category.

Giulia: What risks do you identify concerning circular procurement? And how do these risks influence your decisions?

Alexandra: The main risk, which also reflects the main challenge, is the operational implementation of circular solutions. It is never straightforward. Often, when we start working on the topic, we are offered so-called miracle solutions, which rarely prove to be such. For operational teams and logisticians, it always requires changes and complete revisions of existing processes. This often involves rethinking workflows, and in some cases, adjusting operational systems and management methods in factories. There is a significant logistical complexity that should not be underestimated.

This complexity is perceived internally, which acts as a barrier. Teams know that initiating reuse will complicate the overall logistics loop, particularly in the beginning.

There is also an upfront cost to consider. We must approach this with a long-term investment mindset (CAPEX) rather than comparing the unit cost to conventional linear-cost purchasing.

Giulia: What levers do you consider most effective to support the adoption of circular procurement?

Alexandra: Having a medium-term vision. Over time, circular approaches can simplify logistics processes. For instance, the current use of single-use cardboard boxes for store deliveries is a point of frustration for in-store teams, who have to handle and recycle them.

Implementing circular logistics loops could simplify processes, create cost savings, and most importantly, reduce our environmental impact—provided we can quantify it effectively within the broader business case.

Giulia: What are your medium-term objectives for the circular economy?

Alexandra: We do not yet have quantified targets such as "X% of our portfolio must come from the circular economy."

In the short to medium term, our priorities are:

1. Implementing closed-loop logistics systems to reduce waste;
2. Identifying reuse solutions for waste generated by our operations, particularly materials from store decommissions and product packaging (e.g., for makeup and cosmetics).

7.1.4 Anonymous – Luxury Accessories and Apparel

CSR Director.

Giulia: What is the main obstacle you encounter when trying to integrate circular principles into your procurement?

Respondent: At present, we do not focus much on recirculation of products. We primarily work with high-quality raw materials, and the focus is more on how we manage those materials afterwards. There is a project that focuses on circulation of raw materials among our ateliers. For instance, an artisan in need of a specific type of leather can "purchase" it from another employee that has an excess of it. It is still in an experimental stage, and the first feedback is the complexity behind this reverse logistics model: designers need to reserve a sample, check its viability for the project, then reserve the stock of raw materials. Our production lines, from design to finished product, can last for several months, sometimes over one year, which is very slow for our sector. This is definitely an advantage for these new models, but at the same time, a lot can happen in the meantime.

Giulia: Does regulation—whether from the company, the national government, or the European Union—influence your circular procurement practices?

Respondent: Yes, it does. Regulation definitely plays a role. It pushes us in the right direction and we are constantly monitoring new laws both at a national and international level to anticipate future challenges.

Giulia: Is circularity an important consideration in your purchasing policy?

Respondent: Yes, at the group level, it is. It is particularly important in the context of indirect procurement, as it seems to not have a negative effect on human resources, and it accelerates our transition towards a circular business model without affecting our production lines.

Giulia: Are your suppliers prepared to offer circular solutions?

Respondent: We are increasingly working with them on this topic, but they are not ready to fulfill our needs at a broader scale. Luxury codes are still very dependent on the highest quality standards, and some circular alternatives are still too immature to completely replace the traditional options.

Giulia: Are there internal incentives to adopt circular procurement practices?

Respondent: Yes, within our procurement policies it is clearly stated that one of the six objectives that drive our purchasing decision-making is to limit the depletion of resources and energy to align with circular economy principles, as well as the promotion of eco-design.

Giulia: Is all of this integrated into your broader procurement policy and long-term objectives?

Respondent: Yes, it is part of both our policies and our long-term procurement objectives. All our objectives are publicly accessible, and our stakeholders are pushing us to do better.

Giulia: What risks do you associate with circular procurement? For example, we previously mentioned concerns around quality.

Respondent: The primary concerns are the quality of the materials and their long-term durability. Our customers are a small niche, and they expect top-notch quality, we can't disappoint them. Nonetheless, we have some lines, for instance made of scrap fabric that would have otherwise gone to waste. These products, while eco-designed, still keep the high standards both in terms of design and quality of raw materials.

Giulia: How does this risk perception influence your circular procurement policy?

Respondent: It definitely affects our choice of suppliers, but that is not managed at my level, so I wouldn't be able to answer that precisely.

Giulia: Understood. In your opinion, what are the most effective levers to encourage the adoption of circularity in companies?

Respondent: Changing perceptions.

Giulia: What are your company's medium- and long-term goals regarding the circular economy?

Respondent: They are not quantified, but they are integrated. The main goal is to eliminate waste generation, promote reuse, and ensure that all materials are reused instead of discarded.

Giulia: To what extent do you believe circular procurement aligns with the company's overall strategy and actions?

Respondent: It is a fully-fledged objective of the company's strategy, so I would hope they are aligned. Again, this is not managed at my level, so I cannot say for certain.

7.1.5 Agathe Bailly – Diptyque

Agathe: My name is Agathe, and I am a CSR Project Manager at Diptyque, focusing in particular on the circular economy.

Giulia: What is the main obstacle you encounter when trying to integrate circular economy principles into your company's procurement?

Agathe: In my experience, the biggest challenge is the lack of available options—or at least not having access to specific solutions, innovations, or materials that align with our specifications. So I would say the main issue is a limited offering on the supply side.

Giulia: Does regulation play a role in this? And to what extent?

Agathe: To be honest, we are not particularly strong when it comes to regulatory matters. We have a regulatory department, but it mainly deals with product formulas, perfumes, cosmetics, and so on. As for legislation like the AGEC law, it's actually our CSR team that monitors and ensures compliance. But I think we'll be caught off guard by future regulations if we don't stay on top of them. So yes, it's our CSR team doing that work, though I'm not sure we're doing it very effectively, because I don't know if we have the right information or if we're fully informed. So in terms of how regulation influences our CSR policies, it's not our legal team pushing us to adapt strategy—it's the other way around: we track new regulations to make sure our strategy is heading in the right direction.

Giulia: How important is circularity as a parameter in your procurement decisions?

Agathe: At the moment, I'd say it's not a priority yet because we're not mature enough in this area. I often compare it to how CSR was perceived ten years ago. We're at the early stages of a shift because the circular economy requires a full transformation of the current model. So for now, circularity is not a key factor. We do have CSR criteria and sustainability checklists in our procurement process, and we consider things like the percentage of recycled materials in our products, but it's not mandatory. It's more like a bonus. So yes, we're still early in our journey.

Giulia: Are your suppliers generally ready to provide circular solutions?

Agathe: It's complicated. We operate in the luxury market, which has very high standards in terms of quality, materials, colors, and technical aspects. So we often hit a wall—for example,

it’s just not feasible to get a black that deep using only bio-based or recycled materials. I’m exaggerating, but you get the idea. So yes, that’s a challenge.

Giulia: Are there any internal incentives to adopt circular procurement practices?

Agathe: No, and that ties back to what I just said. I think we’re not at that level of maturity yet, but I believe we will get there.

Giulia: That ties into what you mentioned earlier. What risks do you identify in circular procurement? And how does the perception of risk influence your choices?

Agathe: I do see a few risks. First, the luxury standards—expectations around material quality, visual aesthetics, and brand codes—heavily influence our purchasing decisions. That’s a major risk: not being able to find something that meets luxury standards or not being willing to compromise. Then there’s the financial risk. We purchase in large volumes, and there’s a risk of supply shortages. Plus, circular materials often come at a higher price point. So I’d say those are the three main risks I see: compatibility with luxury standards, supply reliability, and cost.

Giulia: Unless reuse is an option—sometimes reuse can be more cost-effective.

Agathe: Yes, it depends.

Giulia: In our experience, we’ve never had a reuse initiative that wasn’t financially viable.

Agathe: That’s great to hear.

Giulia: What do you see as the most effective levers to promote the adoption of circular procurement?

Agathe: First, educating everyone about what circularity means—especially our procurement teams. They need training and awareness, and then we need to integrate circularity into our procurement standards as a formal criterion.

Giulia: That leads directly to the next question: what circular procurement practices have you already implemented, and are they supported by formal policies?

Agathe: Yes, we have a responsible procurement charter and supplier codes of conduct. We’ve started to structure everything, and it’s part of a continuous improvement process. These documents will be updated as we refine our strategy and gain maturity.

Giulia: That’s excellent. You’ve said several times that you’re not fully ready yet. What are your medium-term objectives?

Agathe: We have many, and they're published in our impact report—so I invite you to take a look there.

Giulia: Are circular procurement practices aligned with the company's overall CSR strategy?

Agathe: At the moment, circularity is not something we've fully integrated. We approach it primarily through the lens of the services and experiences we offer to our customers, as you've explained. So it's not yet embedded in our internal operations, but it absolutely needs to be. It's one of the major pillars and challenges within our broader strategy.

7.1.6 Romain Francon – Orange

Romain: My name is Romain Francon, and I am the Director of CSR for the Orange Wholesale division of the Orange Group.

Giulia: What is the main obstacle you encounter when trying to integrate circular principles into your procurement?

Romain: We already do quite a lot, but the real challenge is finding the right partners, building the right ecosystems depending on the different types of procurement we deal with, and getting our main suppliers to evolve. For example, with large-scale suppliers like Cisco and Nokia—industry giants—it becomes more complicated.

Giulia: To what extent does regulation influence your decisions regarding sustainable procurement?

Romain: I don't have an answer for that. I'm not familiar enough with the relevant regulations to comment accurately.

Giulia: Is circularity an important parameter in your choice of suppliers?

Romain: Yes, absolutely. We have circularity targets. At present, in our network-related procurement—especially on the international side—approximately 8 to 9% of our equipment purchases are recycled annually. Our aim is to gradually increase that to around 15% by 2030. We are currently working internally to identify the relevant suppliers and, with our key stakeholders, developing case-by-case strategies for different procurement categories.

Giulia: Are your suppliers generally ready to offer circular solutions?

Romain: They are in the process of organizing themselves. They're building their skills, first to find appropriate sources for proper recycling and to restore the equipment for reuse. They are also working on developing the right industrial channels in the right locations.

Giulia: Are there internal incentives to adopt circular procurement practices?

Romain: Yes, we have quantified annual objectives. We have allocated budgets and set out strategic plans with clear milestones for 2030 and 2040, with a progressive ramp-up.

Giulia: What risks do you associate with circular procurement? And how does the perception of those risks influence your decisions—for example, financial risks or concerns about perceived quality?

Romain: We don't necessarily identify any particular perceived risk. The main risk is external to us, since we are the clients. The issue lies in whether our suppliers are ready to support this transition.

Giulia: So it's more of a supply chain risk.

Romain: Exactly. That's what I meant when I mentioned the ecosystem—it needs to mature and scale up gradually.

Giulia: What do you see as the most effective levers for encouraging the adoption of circular procurement?

Romain: I believe the financial lever is always the starting point. We need mechanisms with financial incentives—both for us and our suppliers—as well as innovative business models that promote this kind of procurement.

Giulia: When you say financial, are you referring to public funding or more to discounts?

Romain: I mean discounts, but also our own capacity to reintegrate certain components from our suppliers back into the supply chain, particularly through collection systems.

Giulia: What circular procurement practices have already been implemented in your company?

Romain: Our circular procurement practices primarily concern the network segment. We purchase equipment such as routers and switches. We are currently working on strengthening our relationships with suppliers while improving our ability to collect components for return.

Giulia: Are these practices governed by policies or internal objectives?

Romain: Absolutely. As I mentioned earlier, we have quantified targets. The difficulty is that while we are ready and fully engaged, our suppliers also need to be on board.

Giulia: Yes, of course—you're a distributor; you don't manufacture much yourselves.

Romain: We're integrators, yes.

Giulia: And what are your medium- and long-term objectives? You've already mentioned some. To what extent are your circular procurement efforts aligned with the company's overall strategy?

Romain: They are fully aligned with Orange Group's goal of achieving net zero carbon by 2040. Circular procurement is one component of a dedicated program that we actively promote. More importantly, before even communicating about it, we've been working extensively on the operational side. We're building internal expertise, both in operational and support roles, to achieve those targets effectively.

7.1.7 Laetitia Langlois – ESCP Europe

Laetitia Langlois, Sustainability Manager at ESCP

Giulia: What are the main obstacles you face when trying to integrate circular principles into your procurement?

Laetitia: Our structure is somewhat unique, and we are subject to public procurement rules, which creates a significant constraint across all our purchasing activities. Once we surpass a certain threshold, we fall under public procurement regulations. Beyond that, another challenge is simply the lack of available solutions. Sometimes we have a clear idea of what we want to implement, but the market doesn't offer it. For example, we would love to provide students with a card that calculates the carbon footprint of their meals at checkout—an educational tool. Even an approximation would be helpful, but that kind of product doesn't really exist. We've spent nearly a year on this project and have only recently begun identifying potential providers. Internally, we don't have the technical capacity to develop it ourselves.

Then there's the issue of the student card itself. That's managed through a separate procurement process. We were involved, but we didn't lead it. Ultimately, it's governed by the Chamber of Commerce and Industry, our majority stakeholder, and we're bound by their public procurement processes. So yes, it's a significant barrier for us. Ideally, we'd integrate more circular economy principles—of course—but we simply don't have the flexibility. Public procurement rarely emphasizes environmental criteria, and when it does, it's usually framed around recycling or carbon emissions. The concept of circular economy in a broad sense is not really present.

Giulia: That brings us to the next question. To what extent does regulation influence your purchasing decisions?

Laetitia: As I mentioned, it's the key factor. Public procurement is highly specific, especially in France. Our international campuses—Spain, Italy, the UK, Germany—don't operate under the same constraints and often find the system hard to understand. In some cases, it's even easier to make purchases through other campuses to avoid local limitations. Our regulatory threshold is €40,000 over three years, which is quite low and can be reached quickly. Once it's exceeded, the process takes at least three months, with multiple rounds and criteria to define. Even then, unless we control the tender directly—which is rarely the case for large contracts—we have little influence over the final selection.

Giulia: But under public procurement rules, aren't you required to meet certain circularity thresholds?

Laetitia: It depends. Take promotional items—goodies—as an example. Ideally, I wouldn't want any at all. But within the school, some people are very attached to them; they're viewed as part of the brand experience. Unfortunately, these items are all newly manufactured. So yes, even in areas where we could make changes, we are constrained. It's frustrating.

Giulia: Is circularity an important factor in your supplier selection process?

Laetitia: Yes, when we have the freedom to choose. Reducing our carbon footprint by 55% by 2030 is one of our core goals, and procurement is our third largest source of emissions after transportation and buildings. So yes, it's critical. Additionally, we were the first school to launch a Circular Economy Chair. Others like ESSEC have since followed, but we were the pioneers. There's a real need for coherence in our messaging—if we talk about circular economy, we must practice it.

Giulia: And in Scope 3 emissions, I assume student transportation is your biggest impact?

Laetitia: Absolutely. Transportation by students, and to a lesser extent our other mobility and exchanges, represents the largest share of our emissions.

Giulia: Are your suppliers prepared to offer circular services?

Laetitia: Generally, yes. When it comes to carbon and post-production waste—recycling—they're well-positioned. These are the areas with the most regulation and visibility, even for non-experts. But when it comes to eco-design or waste reduction, viable solutions aren't always available. That's partly due to the limitations of the current economic model—unless innovation is involved, it's hard to reconcile.

Giulia: That makes sense. Reducing too much can even diminish the user experience.

Laetitia: In our case, not necessarily—but there are many areas where we could reduce more. Promotional items again come to mind. Unlike furniture or fixtures, which are replaced infrequently, we reorder those every year. That's a significant area for improvement.

Giulia: With promotional items, wouldn't it be better to focus on circular usage rather than sourcing?

Laetitia: Exactly. That's what we're aiming for. But progress is slow. Everyone already has reusable bottles—that trend has passed. Maybe we'll shift toward cutlery or something more innovative. Actually, we're working on a new initiative. It's not official yet, but I'll share it here: we're planning to introduce a voucher system for students at the start of the year. Instead of giving out goodies, students will receive a budget to spend on our ESCP shop—so at least they'll only choose what they'll actually use. They'll even have the option to donate that money to student associations instead of spending it on products.

Another example: when I attend sustainability trade shows like Produrable, I limit the physical materials I bring. Just a few brochures on site, everything else accessible via QR codes. We don't hand out physical giveaways. Instead, we invite attendees to complete a form, and in return, we plant a tree. It's not perfect, but it's certainly better than distributing trinkets. Of course, at mainstream events, the priorities are different—for both attendees and organizers.

Giulia: Are there internal incentives to adopt circular procurement practices?

Laetitia: Yes—when we control the process. That's the issue again. But when we do, we've started several initiatives. There's so much to be done in this area, and while I can't focus solely on circularity, it remains a crucial transformation lever. Our procurement team is well-informed. We're also planning training on sustainable procurement once a pending recruitment is finalized. We'll be joining the National Procurement Convention, which has a CSR charter—just a starting point, but a useful one.

Beyond that, procurement already monitors purchases to avoid unnecessary or environmentally harmful products. And we've implemented financial incentives. For example, at Christmas last year, when the team wanted to buy decorations, I said: if you find circular options, we'll subsidize them. We ended up with sustainable decorations, initially rented and now owned and reused annually.

Giulia: Even the Christmas trees?

Laetitia: Yes, though we use stabilized trees because real ones are not allowed in public spaces without fireproofing. One of them is real but treated. I'm not sure how environmentally friendly that treatment is, but it's a compromise. Circularity matters—but so does fire safety.

Giulia: What risks do you associate with circular procurement?

Laetitia: Possibly a risk of perceived decline in quality. If people think a circular product is inferior, it could reduce buy-in. There's also the question of actual durability. Is a fragile circular item better or worse than a mediocre one that lasts ten years? These are valid concerns. That said, we don't manufacture anything ourselves. Our model is more about circular knowledge.

Giulia: What are the most effective levers for encouraging circular practices?

Laetitia: The carrot and the stick. We haven't invented anything better. The carrot is the financial incentive—like budget coverage for sustainable purchases. The stick is simply banning certain products. Of course, we also emphasize awareness-building. Interestingly, it was the procurement team themselves who requested sustainability training. That speaks volumes. Education alone doesn't move everyone, but it moves many—and reaching individuals can drive organizational change.

Giulia: And you also have a responsibility to educate your students?

Laetitia: Absolutely. Internally, we focus on our operations, but in terms of our student-facing work—yes, very much so. Even in research, we have some of Europe's leading experts on circular economy. Their work spans academic publishing and public outreach—TV appearances, digital platforms. Valentina Carbone, for instance, runs the "Sustainable Supply Chain" channel. Their advocacy is vital.

Giulia: Are your practices governed by policies and targets?

Laetitia: That's something we're working toward after the training phase. While we have a Sustainability department, we want each team to take ownership of their role in circularity. That's key to change management. Our goal is for procurement to define their own policy and objectives, with our guidance. This depends, of course, on whether we're bound by public procurement rules. Even so, we're involved in working groups and economic interest groups through the Chamber of Commerce. So yes, we have some influence—but we need the knowledge and training to exercise it effectively.

Giulia: Great, we're nearly done. What are your medium- to long-term goals for circular procurement?

Laetitia: Implement circular training as a foundation for sustainable procurement.

Giulia: Does all of this align with your organization's broader CSR strategy?

Laetitia: It ties back to the idea of empowering procurement teams and overcoming the constraint of public procurement. To be fair, the Chamber of Commerce has made progress, including hiring an environmental engineer. I expect she'll bring focus to this issue. But right now, if we wanted to set more ambitious goals, we'd face obstacles. And we also have to prioritize. Our biggest environmental impact is carbon. People ask about biodiversity, but our campuses are urban. We do maintain green spaces, but their impact is minimal compared to travel emissions and, most importantly, our educational content. That's something I found frustrating when I joined ESCP—people were passionate about recycling bins, which is great, but in terms of impact, curriculum reform matters far more.

7.1.8 Floriane Bimbert – Le groupe Gainerie 91

Floriane: Hello, I'm Floriane Bimbert. I work at Gainerie 91 as a product designer and head of eco-design and our materials library.

Giulia: What is the main obstacle you encounter when trying to integrate circular economy principles into your purchasing?

Floriane: Let me list the obstacles first before highlighting the main one. When it comes to circular principles, one of the challenges is knowing who to turn to. We conduct market research, but we don't necessarily identify which suppliers are engaged in circular practices. We tend to stick with those we already know and trust. There's a technical issue as well: recycled materials tend to be perceived—and sometimes rightfully so—as lower quality. This is especially problematic in our sector, which is luxury packaging. We need materials that can withstand demanding conditions—climate testing, friction, drop tests, etc. Virgin materials typically pass these tests, but recycled ones often don't. So, there's a real technical limitation.

As for price, it's somewhat of a factor. Circular materials are often more expensive, though supply and demand dynamics are shifting, and some recycled materials are now cheaper. Dormant stock can be a good middle ground. But I'd say the key challenges are technical performance and visibility into which suppliers are truly circular.

Giulia: To what extent does regulation influence your decisions in sustainable purchasing?

Floriane: I'd say quite strongly. There are French, European, and global regulations, ISO standards, and so on. But beyond that, we face requirements from major clients like Kering, LVMH, Chanel, and Hermès. They all have their own sustainability frameworks—Life 360, Eco Guidelines, etc. For example, Richemont has a target of zero virgin plastic by 2030. As a packaging supplier, that's a real challenge for us. But it's possible. For one client, we transitioned from nearly 100% plastic to mostly natural materials. And the remaining plastics are now recycled. It took a year of research and development, but we managed to revamp the entire range. So yes, the influence is strong.

Giulia: How important is circularity when selecting your suppliers?

Floriane: For me, it's very important. My procurement manager would say "quite important." Some suppliers are fully committed, offering products with life cycle analyses and carbon impact data. Others just do business as usual—and they still make up the majority. I'd say maybe 40% of our clients are genuinely interested in circularity; the other 60% just continue as before. So, circularity is an important criterion—but mainly for the clients who care about it.

Giulia: Are your suppliers generally ready to offer circular solutions?

Floriane: Yes. All our material suppliers have alternatives—at least most of them. Some are even ahead of the curve. They know that if they don't offer circular options, they'll lose market share to those who do.

Giulia: Are there internal incentives to adopt circular purchasing practices?

Floriane: Yes and no. We have a responsible purchasing charter, but with our Chinese teams, there's a need to explain and promote these ideas—it's still seen as a "European obsession." That's not ideal. So no, we don't actively push it internally yet. But when clients ask for it, we implement it. So the pressure comes from outside more than within. That said, we're aware we have work to do.

Giulia: What risks do you identify in circular purchasing, and how does risk perception influence your decisions?

Floriane: Availability is the big one. We're used to catalog-based solutions that are readily available. For example, I've looked at sourcing platforms with dormant inventory, which of course has limitations—those items aren't being produced anymore. Circular materials work for small series, but for large volumes, it's more complicated unless you're willing to replicate orders. So yes, the main risk is supply availability.

Giulia: What lever do you find most effective for encouraging circular purchasing?

Floriane: Unfortunately, we rely heavily on client pressure. That's what drives change. It's hard for us to take the lead when suppliers are generally smaller and we're dependent on client decisions. Internally, we do run CSR initiatives every two months at each site, which helps reinforce sustainability awareness across the company, including in purchasing. Our buyers also receive training in responsible purchasing.

We use our carbon footprint analysis as a decision-making tool. It helps us identify which purchases are the most problematic and which ones we should prioritize for change. For instance, we use a lot of leather, but our carbon analysis showed that steel had a greater impact, even though we order less of it. So now we're exploring options like using recycled rather than virgin steel. Everyone is working together to test new approaches.

Giulia: What circular purchasing practices have you already implemented within the company?

Floriane: Reuse is our most developed practice, especially in logistics. We collaborate closely across our sites in China, Mauritius, Portugal, and France. We reuse shipping boxes and packaging between sites. We've also eliminated most plastic in logistics, or at least use recycled plastic. We use kraft paper and similar materials.

We're experimenting with rental models and bringing back products that are modular and repairable. We aim to include the most sustainable options in our product catalog wherever possible.

Giulia: Are these practices governed by specific policies or objectives? You mentioned they are often client-driven—are there any internal incentives?

Floriane: We've set up an internal CSR improvement plan. We originally thought we would be subject to the CSRD this year, but we're not yet—probably next year. Still, we've started preparing by adopting a tool to help guide us through CSRD compliance. So yes, we have a steering plan. It's still in development, but it's moving. Client demand is what pushes us forward, but we also need to take the initiative—just as our material suppliers do with us. Ultimately, decisions are driven by the top of the chain, and we follow. So yes, there is some structure.

Giulia: What are your company's medium- and long-term objectives for circular procurement?

Floriane: Honestly, we haven't set clear objectives yet. And that's probably the worst part—we talk about it, but we don't have defined targets. I think we'll establish them once we fully implement the CSRD steering process. That said, we've taken some real steps in the meantime.

For instance, we've begun measuring waste more precisely. Last year, our French site generated 500 kg of leather scraps—we recorded that for the first time. Initially, we worked with a partner called Poreba to recycle those scraps. Now we collaborate with L'Atelier des Matières, which transforms them into new material. We then offer the resulting product to our clients. So yes, we're trying to close the loop. It's not yet framed by hard targets, but there are real initiatives underway. I'll probably raise this issue internally—we need defined goals.

Giulia: To what extent are your circular procurement efforts aligned with the company's overall CSR strategy?

Floriane: They're very aligned. Our buyers are the ones responsible for reporting material use in our carbon accounting, so they know they need to be precise and limit high-impact materials. That's where I come in. I manage our materials library. We track both standard and alternative materials, and we conduct tests to evaluate them. If they pass, we add them to the commercial catalog. So yes, I would say circular procurement is closely aligned with our CSR strategy.

7.1.9 Caroline Elisseche – Raja

Caroline: Hello, I'm Caroline Elisseche, Director of CSR and Sustainable Development for the Raja Group.

Giulia: What is the main obstacle you face when trying to integrate circular principles into your procurement?

Caroline: At Raja, we are distributors of packaging, office supplies, and office furniture. For us, circularity primarily concerns packaging. Currently, there are three major barriers to implementing circular packaging systems. The first is cultural—consumer habits must change. The second is economic—today, it generally costs more to use reusable packaging than to purchase new packaging. The third is operational—establishing a logistics chain and modifying operations both internally and at the client level (and even the client's clients) is complex.

Giulia: How does regulation influence your decisions regarding sustainable purchasing?

Caroline: In the packaging sector, we've seen an accumulation of regulations, making the landscape extremely complex. It's difficult to navigate. As a result, we no longer base our

decisions on regulation alone—we focus instead on doing the best we can with the resources and context available to us.

Giulia: To what extent is circularity a factor in your supplier selection?

Caroline: At present, circularity is not necessarily a decisive criterion in choosing suppliers. What matters more broadly are their CSR commitments—both social and environmental. Circularity is one factor we consider, but it is far from the only one.

Giulia: Are your suppliers ready to offer circular solutions?

Caroline: Our long-standing suppliers are not yet equipped to offer circular solutions. They continue to rely mostly on traditional models. In contrast, we're seeing startups and new companies emerge with innovative business models specifically built around circularity. These are the partners we tend to work with when implementing circular models.

Giulia: Are there any internal incentives to adopt circular procurement practices?

Caroline: There are no formal internal incentives. However, there is a strong internal conviction that our markets—whether in packaging or office furniture—must evolve toward more circular models. As a market leader in packaging and office supplies, we see it as our responsibility to be a pioneer.

Giulia: What risks do you associate with circular procurement? And how does that risk perception influence your purchasing decisions?

Caroline: In packaging, the first risk we've identified is reputational—there are questions about product quality. For example, when a package has already been used, at what point do we determine whether it's still compliant? Defining product conformity is a major issue.

The second concern is around public perception of plastic. To offer reusable solutions, we often have to switch from paper or cardboard to plastic packaging. However, plastic is viewed much more negatively—even though, if you look closely at the environmental impact of reusable plastic versus paper or cardboard, reusable plastic actually performs quite well.

Giulia: What do you see as the most effective levers for enabling circular procurement?

Caroline: I believe we need a few strong success stories. We need major clients to take the lead—whether in reusable furniture or reusable packaging. Once a large group steps forward and says, "We did it, it works, our clients are happy, our employees are satisfied," it will inspire others and reduce resistance to change.

Giulia: What circular procurement practices have you already implemented in your company? Are they governed by specific policies or internal objectives?

Caroline: We are genuinely committed to deploying reusable packaging solutions. While we don't yet have clear development targets, the ambition is strong and fully aligned with our CSR objectives. As for office furniture, we are still in the early stages—the story is yet to be written.

Giulia: What are your medium- to long-term objectives?

Caroline: We haven't yet quantified our long-term objectives.

Giulia: To what extent is circular procurement aligned with your company's overall CSR strategy?

Caroline: Circular procurement is fully aligned with our company strategy. We're distributors. When we provide packaging, we are ultimately delivering a product that, once it reaches our client, becomes waste. In the best case, it ends up in the recycling bin. We are fully aware that we can't remain in this linear model. Transitioning to a circular model is imperative.

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