

A business change case study

Sky's approach to removing single-use plastic from its business

The University of Cambridge Institute for Sustainability Leadership

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Author and acknowledgements

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About this case study

Plastics have become abundant in our landscapes, oceans and even in our bodies. They are the product of a linear, waste-generating economy, which has had scant regard for its environmental and social consequences over many decades. For this reason, I am particularly pleased to introduce this case study describing Sky's journey towards reducing its reliance on single-use plastic.

This is a story of business leadership on a complex sustainability challenge, precisely the kind of action we sought to inspire when we published our *Rewiring the Economy* plan in 2015.¹ That plan, developed in consultation with our network of 8,000 leaders and practitioners, presents ten tasks for business, government and finance leaders to tackle over ten years to lay the foundations for a sustainable economy.

Any serious rewiring of an economy requires active business engagement and leadership. Not surprisingly our four tasks for business in *Rewiring the Economy* highlight its role in aligning organisational purpose, strategy and business models; setting evidence-based targets, measuring and being transparent; embedding sustainability in practices and decisions; and engaging, collaborating and advocating change.

This Sky case study is a practical example of how a business can prosper in alignment with those tasks. By sharing the learning arising from Sky's commitment on single-use plastic, we hope more businesses will be inspired to follow suit through their own processes of rewiring.



Dr Jake Reynolds,

Executive Director, Sustainable Economy

University of Cambridge Institute for Sustainability Leadership

We want to support the change being directed at one of the biggest man-made environmental disasters that faces our planet – plastics in the ocean. That is why we launched Sky Ocean Rescue to raise awareness about ocean health and encourage our staff, the public and other businesses to remove single-use plastic from their lives.

As part of this we want to make sure we are meeting our commitment to remove single-use plastic in the best possible way, and if not, learn how to do it better. We commissioned experts from the University of Cambridge Institute for Sustainability Leadership to conduct this in-depth review of what we have done and how we have done it. We will use the findings of this work to inform how we further transform our business and inspire other businesses to become single-use plastic free.



Jeremy Darroch,

Group Chief Executive

Sky

Executive summary

Urgent action is required by business, government and consumers to create a transformational shift in the way we consume and use single-use plastic to stop the flow of this material into the natural environment. This case study explores how Sky has taken action to remove single-use plastic from its business through its strategy, leadership, management and engagement.

Today we use over 300 million tonnes of plastic every year, of which approximately half is single-use plastic² – items that are used once and then disposed of. Single-use plastic items are designed to make our lives more convenient – from beverage bottles to cotton buds, cigarette butts to cutlery, food packaging and plastic bags.

However, their ubiquitous use has resulted in growing environmental challenges. If not reused, recycled or disposed of correctly through well-managed waste and recycling systems, these items can enter the natural environment where their durability means they can take many decades to break down, posing a potential hazard to human and animal health.³ It is estimated that 80 per cent of marine litter comes from land-based sources.⁴ Businesses therefore play an essential role in helping society to address the challenge of single-use plastic litter by reducing the flow of this material into the economy, and where it is required, ensuring a circular approach is taken in design to aid its recovery.

Some businesses are already taking action and have made commitments to remove single-use plastic from their products,

operations and supply chains. This aligns with Sustainable Development Goal 12, which aims to ensure a transition to more sustainable forms of production and consumption.⁵

In October 2017, Sky was the first company to set a target to remove all single-use plastic from its operations, products and supply chain by 2020. During 2018, it has removed 175 tonnes;⁶ the equivalent of 19 rubbish trucks full. By 2022, Sky projects that it will have removed an estimated 2,000 tonnes in total of single-use plastic, equivalent to just over 200 rubbish trucks full, and that single-use plastic will no longer be present in the company’s operations, products or supply chain. Although Sky uses a small fraction of the 300 million tonnes of plastic produced annually, as the first company to set such a commitment, it hopes to inspire and encourage other businesses to take action to reduce their use of single-use plastic.

This report, based on a study of Sky undertaken by the University of Cambridge Institute for Sustainability Leadership (CISL), recommends the following process for companies seeking to reduce their use of single-use plastic:

Figure 1: How businesses can act to remove single-use plastic



Setting an ambitious target can provide a company-wide mandate to inspire and embed change at all levels. Embedding in culture, values and leadership can encourage change through enabling a shared sense of ownership and responsibility by staff to act unprompted. Implementing effective governance and accountability through clear management structures, consistent monitoring and measurement supports targets to be embedded. Working in partnership can accelerate change both internally and externally through working with supply chains and policymakers to shift whole sectors and systems.

Different businesses may have different starting points and challenges, and in some instances, such as for food preservation, health and safety or security reasons, removal may be more challenging. However, if we are to meet targets such as those set out by government and those within the UK Plastics Pact⁷ and The New Plastics Economy Global Commitment⁸ it is essential that businesses take action now. While the proposed process is based on the actions of just one company in their bid to remove single-use plastic, we hope this case study will provide transferable learning that other companies may apply in considering how to implement similar commitments and changes in their business.

If all European Union (EU) companies committed to go single-use plastic free, an estimated total of 345 million tonnes of single-use plastic could be removed from the economy by 2025,* enough to fill the equivalent of around 140,000 Olympic-sized swimming pools.

* see Appendix for detailed calculations

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Introduction

Addressing the issue of single-use plastic requires urgent business action

Currently we use over 300 million tonnes of plastic every year, of which approximately half is single-use plastic² – items that are used once and then disposed of. Across Europe, 40 per cent of all plastic is used only once before being disposed of.⁹ Not all single-use plastic is disposed of correctly via residual waste or recycling systems; some finds its way into the environment as litter. It is estimated that 250 kilograms of plastic enter our oceans every second.¹⁰ Given that by 2050, global plastic production is expected to increase six-fold to 1,800 million tonnes annually,¹¹ this could lead to a significant increase in the volume of plastic reaching our oceans. Without urgent action, the flow of plastic material into the oceans is likely to continue unabated.

“Today, 95 per cent of plastic packaging material value, or USD 80–120 billion annually, is lost to the economy after a short first use.”

The New Plastics Economy, Ellen MacArthur Foundation¹²

Actions to address the use of single-use plastic are being campaigned for by non-governmental organisations and consumers. Awareness amongst consumers has been raised by television series, such as Blue Planet II narrated by Sir David Attenborough,^{13,14} and awareness campaigns such as Sky Ocean Rescue.¹⁵ Alongside ongoing campaigns that aim to increase recycling¹⁶ or stop littering by consumers,¹⁷ campaigns to address single-use plastic, some consumer led, urge consumers to take actions such as, ‘pass on plastic’,¹⁸ ‘go plastic free’,¹⁹ and ‘create a world free of single-use plastic’.²⁰

Governments are taking action through policy. Globally, many governments are now seeking to ban or tax certain single-use plastic items such as plastic bags, bottles and straws.²¹ In early 2018, the UK Government consulted on “using the tax system or charges to address single-use plastic waste”,²² which resulted in the announcement of a new tax for plastic packaging with less than 30 per cent recycled content.²³ It is also planning to reform its ‘Packaging Producer Responsibility System’²² and invited comments from industry on how to reform regulation relating to

packaging.²⁴ The European Parliament has introduced a ban on a number of single-use plastic items, including plates, cutlery, straws and stirrers, and has set a target to reduce consumption of further items for which no alternative currently exists, such as single-use burger boxes, sandwich boxes or food containers, by at least 25 per cent by 2025.²⁵

Businesses are starting to take action, from setting their own targets to completely transforming their own businesses or working in collaboration. Approaches include adapting products through replacing specific items with non-plastic recyclable alternatives,²¹ increasing recyclability and recycling through taking a circular approach to product design and use,²⁶ and making products using recycled ocean plastics.²⁷

In 2017, Sky was the first business to commit to removing all single-use plastic from its operations, products and supply chain by 2020. Over 100 companies have signed the UK Plastics Pact, launched in April 2018, and over 250 organisations have endorsed The New Plastics Economy Global Commitment,²⁸ which launched in October 2018. Both of these voluntary initiatives include a commitment to eliminate problematic or unnecessary single-use plastic packaging by 2025. A small number of individual companies have also made similar single-use plastic commitments, such as Iceland Foods Ltd²⁹ and Ikea.³⁰ However, further action is required by business to create significant reductions in the use of single-use plastic.

This case study is based on six months of research, interviews and analysis undertaken by CISL at the Sky campus in London. The aim of the study was to capture the Sky ‘story of change’ for how it has removed single-use plastic following its commitment, and distil the key lessons from the approach taken so that this can be shared more widely with other businesses. It acknowledges the complexity of the challenge, including for businesses for whom single-use plastic items may be a core part of their products, and the challenge of how to avoid negative unintended consequences when considering alternatives.

The single-use plastic challenge for business

Single-use plastic is a significant global issue.

An estimated 89 per cent of all plastic entering the ocean is from single-use plastic.³¹ These items are designed to make our lives more convenient. However, if they are not disposed of correctly through well-managed waste and recycling systems these items can enter the natural environment, where their durability means they can take many decades to break down, posing a potential hazard to human and animal health.²

Every part of society has a role to play in reducing the leakage of single-use plastic items into the natural environment. Consumers can change their behaviour through choosing alternatives to single-use plastic or when they do choose to use them, disposing of them responsibly through recycling or waste collections. Government can support through policies that incentivise and enable businesses to take action across value chains to remove single-use plastic and increase adoption of design that supports a circular approach through improving collection and recycling infrastructure. Businesses can seek to reduce the volume of single-use plastic flowing into the economy and therefore reduce the volume used by consumers that could potentially leak into the natural environment.

If all FTSE 100 companies encouraged their employees to take action, they have the potential to reduce single-use plastic consumption by approximately 2.3 million tonnes per year,* enough to fill just over 900 Olympic-sized swimming pools.

In 2016, the New Plastics Economy set out an ambition to reduce the flow of plastic into the environment through more effective design, reuse and recycling.¹² They stated that this would help to capture the value of the material and that redesign to reduce or remove single-use plastic could contribute to a significant reduction in the potential flow of single-use plastic into the environment.

There are examples of redesign already happening. A number of companies have committed to replacing specific items; for example, removing plastic straws and replacing with paper, bamboo and metal alternatives.³² There are also an increasing number of ‘zero waste’ stores,³³ as well as retailers allowing customers to bring in reusable containers in which to purchase their food.³⁴ Whole sectors are also considering how

they can eliminate plastic packaging waste through policy changes, optimal use of materials, behaviour change to create societal norms and exploring the feasibility of alternative delivery systems and how they could be delivered at scale.³⁵

Some single-use plastic may be hard to remove, even in the long term. This may be due to how it is used or because viable alternatives do not currently exist, are not feasible at scale or the infrastructure to recycle or compost them is not widely available. There may also be legal requirements, health and safety, hygiene or substance control reasons, such as for corrosive cleaning chemicals. Further examples include:

- **security requirements**, for example, the single-use plastic cups used for outdoor events, pubs and venues to reduce instances of smashed glass
- **hygiene and food preservation**, for example, food gloves and packaging of some food and beverages (for example, raw meat and dairy) to prevent food waste
- **needs-led use**, for example, medical supplies required for first aid purposes or personal health and well-being.

Businesses in these industries will find it harder to remove all single-use plastic from their products and services. However, in seeking to address this issue and review where and how they use single-use plastic, these businesses may still be able to reduce the overall volume of single-use plastic they use and ensure that what they do use has an end-of-life value. For example, through making changes in their operations, or, over the longer term, through researching and developing innovative alternatives to single-use plastic for their core products. Even if these businesses only make minor reductions in the volumes of single-use plastic they produce, they could still contribute to total reductions in the use of single-use plastic, and while doing so, increase the overall sustainability of their business.

The following sections set out how Sky has removed single-use plastic from its business through its strategy, leadership, management and engagement and from this, recommends a process other companies may apply in considering how to implement similar commitments and changes in their business.

* see Appendix for detailed calculations

Sky case study

Sky’s commitment to remove single-use plastic

Sky is a telecommunications company headquartered in the UK and operating across Europe. In January 2017, as part of Sky’s sustainable business strategy,³⁶ the company launched Sky Ocean Rescue,¹⁵ a campaign to highlight ocean health and the issue of ocean plastics. The campaign had backing from His Royal Highness (HRH) The Prince of Wales³⁷ and has since received positive feedback from key government ministers who see it as helping to highlight the issue of plastic pollution.

“I find it sobering to think that almost all the plastic ever produced is still here somewhere on the planet in one form or another and will remain here for centuries to come, possibly thousands of years. Sky’s ocean plastics campaign will hopefully create further awareness of this incredibly serious issue.”
HRH The Prince of Wales³⁷

“Through its Ocean Rescue campaign Sky has helped to shine a spotlight on the devastating impact plastic is having on our oceans and marine life. I am determined to take action to tackle this blight, but when it comes to protecting our natural world, everyone has a role to play. I look forward to seeing how innovation and creativity can help to turn the tide on plastic waste.”
Environment Secretary, Rt Hon Michael Gove MP³⁸

Box 1: Sky’s approach to removing single-use plastic

Sky defines single-use plastic as plastic items that are only intended to be used for a short period of time, generally only once, before they are disposed of either into landfill or recycling. Sky views this as including recyclable materials, such as petroleum-based plastics, food packaging and containers, disposable items and marketing displays. Sky’s work focuses on removing unnecessary plastics and recognises necessary exceptions, such as hygiene and food preservation packaging, items required for security or needs-led use purposes.

Packaging and products that are designed to be reusable, can be repaired or dismantled, and are industrially recyclable are outside of the scope of Sky’s definition. These include:

- items that have an end-of-use value beyond the market recycling value, such as set-top boxes for displaying electronics and mobile phones
- long-life items used in Sky’s operations, such as furnishings.

Sky uses a waste hierarchy approach, seeking to eliminate single-use plastic before reusable or recyclable alternative materials are considered (see Figure 2). When finding alternatives, Sky considers the whole environmental or social impact, so as to not create unintended consequences. For example, by increasing carbon emissions or diverting land away from food production.

Sky does not currently consider either bioplastics or biodegradable plastics to be a feasible alternative to single-use plastic. Bioplastics are made from bio-based materials, however, they perform in the same way as oil-derived plastic and therefore do not break down in the environment.

As part of its Sky Ocean Rescue campaign, the company announced three commitments in October 2017, which have now been extended to four, as follows:

1. Transform its own business by eliminating all single-use plastic from its operations, products and supply chain by 2020.
2. Through a new investment fund, encourage and support innovation to develop new ideas to stop plastics polluting the ocean.
3. To use Sky’s voice to inspire others to take action whether through everyday individual behaviour change, adopting policy changes or safeguarding marine areas.
4. Partnering with WWF to protect over 400,000 kilometres squared of our oceans for the long term.

To support staff in implementing its first commitment, Sky developed a *Business transformation guide to eliminate single-use plastics*.³⁹ This practical guide set out Sky’s approach to removing single-use plastic in the business (see Box 1), including how it defines single-use plastic, the alternatives it will accept and providing a toolbox for measurement, decision-making and prioritisation.

Biodegradable materials require certain conditions to break down and therefore, may not immediately break down if they end up in the environment. In researching biodegradable alternatives, Sky identified that some of these products still contained a very small percentage of plastic and therefore had the potential to create microplastics when they broke down, so does not currently consider them a feasible option.

Sky favours commercially recyclable alternative materials to single-use plastic, such as Forest Stewardship Council (FSC)-certified paper and cardboard, and plant fibres.

Sky is consistently monitoring and revising its waste strategy to reflect changes in the UK, and is currently implementing a ‘zero waste to landfill’ policy.

Figure 2: Sky’s approach to the waste hierarchy



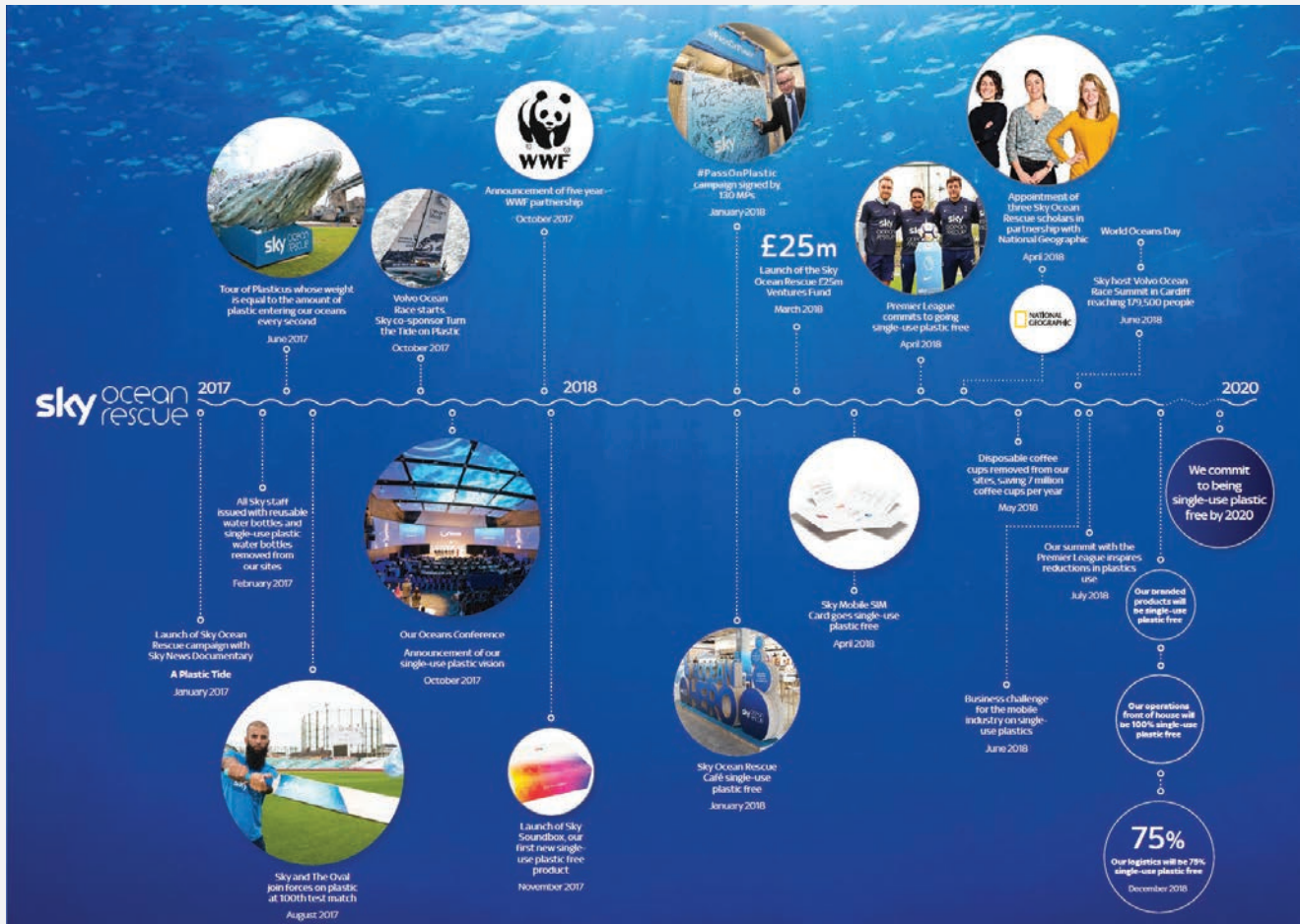
What has Sky achieved so far?

In a year since making its commitment, Sky has removed 60 per cent of the single-use plastic used by the business, and it estimates it will remove a total of 2,000 tonnes of single-use plastic by 2022 (see Figure 3).

While single-use plastic is not core to the Sky business in the same way it is for some businesses – for example, food and drink producers – meaning they have not had to change their core product offering, it was used throughout the business’ supply chain. Sky used it to package its products, in the production of Sky Mobile SIM cards, for

promotional products at events and throughout catering and operational services. Sky reports that by the end of 2018, all of its branded products will no longer be packaged in single-use plastic, its operations front of house will be single-use plastic free, and 75 per cent of its logistics will be single-use plastic free.⁶ Through continuing to work with industry partners, investing in innovation to remove harder to eliminate single-use plastic and further liaison with government on policy and taxation reforms to incentivise business change, Sky aims to reach its target by 2020.

Figure 3: Sky’s progress to date to remove single-use plastic from its business



Drawing out Sky’s ‘story of change’

In early 2018, Sky commissioned CISL to undertake an in-depth review to establish what the business had done towards meeting its commitment to remove single-use plastic and how it had undertaken the work. The aim was to capture Sky’s own ‘story of change’ and to build a case study that captured the key elements of the transformation. As one of the first companies to set such a commitment, Sky hoped to inspire and encourage other businesses to take action through learning from how it had met its commitment.

Between March and July 2018, CISL undertook data analysis, interviews with 18 staff members, a staff survey that received 150 responses and desk research. From the figures and responses provided by Sky, CISL was able to establish the quantity of single-use plastic Sky had removed to date according to their calculations, and to draw out Sky’s ‘story of change’.

What is Sky’s ‘story of change’?

Based on our work with the company, CISL has developed Sky’s ‘story of change’. The ‘story of change’ highlights the key factors that have enabled the business to transform in order to meet its commitment. Four areas where action had been taken emerged:

- 1. Strategic ambition.
- 2. Visible leadership.
- 3. Transparent management processes.
- 4. Partnerships for engagement and change.

The key elements of each of these areas of action are shown in Figure 4. The following four sections set out the ‘story of change’ in more detail. Each section includes why it is important for a business to take action in these areas, drawing on the tasks for business set out in CISL’s *Rewiring the Economy* plan,¹ followed by details and staff quotes drawn from the interviews and survey undertaken with Sky staff by CISL. In doing so, they recommend a process based purely on the Sky case study that other companies may seek to apply in considering how to implement similar commitments and changes in their business. While this approach has been developed based on business transformation to eliminate single-use plastic, it could feasibly be applied when addressing other sustainability issues within business.

Figure 4: Sky’s ‘story of change’

(1) Sky’s strategy: to be single-use plastic free as a business by 2020			
(2) Leadership	(3) Management	(4) Engagement	
Sky culture: existing values and ethos to ‘do the right thing’	Governance and accountability: Sky Ocean Rescue Steering Group	Internal engagement: created a significant shift in behaviour	
CEO commitment: leadership from the top clearly defined the ambition	Systematic approach: established a baseline and tracked progress	External engagement: worked in partnership with suppliers to innovate	
Leadership at all levels: responsibility taken to embed in own area of the business	Cost neutrality: delivered within existing budgets and resources	Systemic change: influenced beyond the business	



1. Strategy: transform the business through ambitious target-setting

Setting a target that is recognised as ambitious and inspiring can provide a company-wide mandate to embed transformation at all levels. For Sky, aiming to remove all single-use plastic produced or used by the company created an all-or-nothing commitment that required the business to go beyond easy wins or efficiency savings to transform all areas of the business to meet the target. This type of bold and ambitious target sends a strong signal to all stakeholders that a business is committed to driving positive change.

Targets for tackling single-use plastic should be stretching, whilst having a realistic timeframe depending on the specific challenges faced by a business. A realistic timeframe should allow sufficient time to identify and implement potential solutions, both within the business and through working with stakeholders. For example, Iceland Foods Ltd, which uses single-use plastic to package many of its products, has set a vision to remove all single-use plastic from own-brand products in a five-year plan to 2023.⁴⁰ They have set a five-year target, as they believe this is a feasible period for them to work with suppliers to find cost-neutral solutions that maintain or improve shelf life and have no adverse impact on food waste. Iceland has already removed 3,000 tonnes of single-use plastic from the business, and expects to remove 3,500 tonnes by early 2019, just over a fifth of the 16,000 tonnes it needs to remove in total to achieve its 2023 target.⁴¹

Sky's strategy to become a single-use plastic free business by 2020

"We have always been leaders in this type of campaign – whether single use plastics, climate, diversity – we are the first broadcaster to do it."

Sky staff member

Sky's commitment to remove all single-use plastic from the business by 2020 was perceived by staff as being an ambitious but achievable target. Staff report that the commitment was made public before a clear plan for how it could be achieved was developed internally. Staff responded by creating a pipeline for development across Sky's product range, operations and broadcasting. In their plans, they reportedly recognised that some solutions may take time to build and require creating innovative solutions.

"The main challenge is that we are at the front of the curve, so solutions are not evident. We are trying to find suppliers who can do it."

Sky staff member

Overall, staff felt that the three-year timescale has accelerated business transformation and that since making the commitment, Sky has changed its business practices and it has catalysed an internal culture of change. They were clear that achieving Sky's commitment would not have been possible without clear and visible leadership, effective management, and open collaboration and engagement. They said it is the combination of all these elements, which underlie the commitment, that has made the transformation feasible, and that if one was less apparent this would have affected their ability to deliver against it.

"The ambition is big, but should not be anything less."

Sky staff member



2. Leadership: embed in culture, values and ethos at all levels

To lead the change we need for a sustainable economy requires purpose and values aligned with global sustainability goals, alongside the ability to be proactive, reflective and adaptive. A demonstration of this type of thinking, values and practice from senior leadership can provide impetus and direction. However, leading from the top will not achieve change on its own.

Embedding sustainability into the culture, values and ethos of a business can create an environment that encourages change and ensures delivery against challenging targets. Where stretch targets are owned by all staff and the vision is shared it becomes much easier to garner support for new initiatives and make the necessary changes. Creating a culture that is built on sustainable values enables a shared sense of ownership and greater likelihood that staff will act on achieving targets unprompted. A strategy and culture centred on removing single-use plastic should aim to achieve the lowest environmental impact and greatest staff engagement possible in implementation.

The growing public awareness of plastic pollution encourages a business to be more courageous with target setting, as staff are more likely to be aware of the issues and willing to take the initiative to act. Connecting to the hearts and minds of staff will make it easier to navigate potential failures and enable new leadership and innovation across the business. It creates a company-wide mandate for action.

Sky culture: existing values and ethos 'to do the right thing'

"When we set a target – we always look to achieve it and go beyond."

Sky staff member

Following the announcement of the commitment, staff recount the "lack of resistance" to achieving the target because it was seen as the "right thing to do", rather than a top-down mandate that had to be followed. The perception by staff is that everyone can contribute to positive change and anyone can come up with ideas or innovations, and when they do, their effort is acknowledged. They report being inspired not only to act, but to take the initiative in their area of the business to deliver against the commitment. The perception of staff is that Sky has developed a culture and belief that the company can effect real change, where Sky use its platforms, products and partnerships to escalate change.

"Sky is a very ambitious company. We will only set targets that are unprecedented, and are not surprised that Sky is the first FTSE 100 company to make the commitment."

Sky staff member

As an international business, Sky has to navigate three different cultural identities to address one business-wide commitment and adapt implementation to reflect different needs and values. For example, disposable coffee cups

were a major issue for them in the UK, however not in Italy. Staff report that Sky used its central management structure to implement a transition that is sensitive and mindful to different cultural operating contexts and enables learning across the business. For example, staff report that they are using the Italian culture of having a sit-down meal at lunchtime and trying to embed this approach across the business by merging action on single-use plastic with wider values on health, wellbeing and sustainable living initiatives.

"Sky has a history over the last decade of understanding big issues to society and customers and taking action on them. Being a fair and responsible business is always at the heart of what we do."

Sky staff member

Sky leadership from the top clearly defines the ambition

"That our CEO is talking about it and setting goals – has to be one of the key reasons why it becomes achievable."

Sky staff member

Sky staff perceive that the leadership shown by Jeremy Darroch, Sky's Chief Executive Officer (CEO), is a driving force in making the commitment seem inherently achievable. Sky's CEO is viewed by staff as leading from the front, using his position as an opportunity for advocacy, speaking at global conferences and communicating internally to staff.

"There is clear leadership from our CEO. It is his ambition and direction for this campaign. There are also members of his executive team that have taken it on in different parts of the business."

Sky staff member

Staff report that the leadership shown by their CEO provides a clear strategic direction and embodies the sustainable values and ethos that Sky has created internally. They report that a key part of his leadership is an open approach to innovation, with the single-use plastic target defined as a way to advance business, as a catalyst for the industry, rather than a barrier that needs to be overcome.

"We are free to innovate – our CEO likes us to be disruptive and as new and novel as possible. Sky is a good place to pilot things."

Sky staff member

Leadership is shown at all levels in Sky

"Leadership is throughout the business – it wouldn't work if it was just from the top."

Sky staff member

Staff at all levels in Sky report feeling empowered to take active leadership. They feel encouraged to take on any challenge, develop solutions and have ownership of the outcomes in their own area of the business. They report that senior leadership have the mandate to act, creating solutions and in so doing, empowering their teams to become champions of the single-use plastic vision. This approach has embedded change across the business.

"When our CEO announced that Sky was launching Sky Ocean Rescue, we knew we had to look into this issue and act on it so as to be authentic. Staff at Sky started working on this initiative before the official commitments came out."

Sky staff member

As a team, staff report that they work like a coalition bringing together different representatives from across the business to create a dual approach of top-down strategy and bottom-up action. Managers say they have two core roles: first, to deliver on the targets in a way that is relevant to their area of the business – either on a specific product like Sky Soundbox, a specific operations function like the Sky Ocean Rescue Café, or new partnerships like the Premier League. Second, to act as advocates and exemplify the leadership, values and ethos of Sky, for example by speaking at public events on solutions to ocean plastics.

"It is the combination of systemic top-down leadership and bottom-up action by individuals and teams who are taking action immediately that is having the real impact."

Sky staff member

Sky staff report that leadership by individuals at all levels is driven by personal conviction and values, and that it is resulting in innovative ideas. They report that this has been encouraged through internal campaigns such as Bigger Picture Month, which encouraged Sky staff to take on single-use plastic challenges. They say support is given for new ideas wherever they come from in the business or partnership, regardless of seniority. For example, a new type of alternative packaging developed with one of Sky's main suppliers is named the "Ros Box" after the staff member at Unipart who came up with the idea (see Box 2).

"The messaging is being done at the highest level, the actioning is happening at different levels of practical application."

Sky staff member



Box 2: the 'Ros' box

The challenge: to create a single-use plastic free reusable alternative for Sky engineers that enables the safe transit of a replacement product and the safe return of the original item

The solution: to work with the supplier who produces the packaging on identifying a potential solution and jointly create change

The outcome: a new box, called the 'Ros Box' that has a double lid, so customers can receive their new product and return the non-working product without changing the packaging



3. Management: implement effective governance and accountability

Effective implementation of a target needs to be supported by a clear management, governance and accountability structure. This could be achieved through embedding new targets into the existing senior leadership processes on corporate sustainability or through creating a specific senior management work stream that is set up for the purpose of implementing the commitment. Creating a specific steering group that is accountable to deliver a single-use plastic target has the advantage of being solely accountable for delivering within the time limit and allows adequate time to go into more detail in specific areas. The creation of sub-groups could also support implementation and deliver on management decisions in specific areas of the business.

A business should measure what they seek to manage by establishing a clear baseline and undertaking consistent monitoring. Undertaking a thorough audit when the target is first set can provide a full picture of where single-use plastic is found in the business, as well as setting a baseline against which progress can be measured. The chosen approach should be consistent across the business, although this could be challenging when existing tracking and business operations may vary greatly, especially when supply chains are taken into account.

While Sky aimed for cost neutrality, this may not always be feasible for a business, especially where investment is required to enable innovative and alternative solutions to emerge. Additional time and resource may be required, to both develop solutions internally and work in collaboration externally with supply chains to drive change.

Governance and accountability: the Sky Ocean Rescue Steering Group

“The role of the Steering Group is to push the rest of the business. We are the ambassadors within the business.”

SOR Steering Group member

Staff report that Sky’s existing management board, the Sky Ocean Rescue (SOR) Steering Group, has taken on governance and accountability for delivery of Sky’s single-use plastic commitment. The SOR Steering Group is the cross-business senior executive board that was set up in 2017 to monitor and internally hold Sky to account on all activities it undertakes against its Sky Ocean Rescue commitments. The monthly meeting is attended by members of the senior management team from each of Sky’s business units and chaired by Sky’s CEO. Members of the SOR Steering Group said that although they originally reported on every area of the business at every meeting, they have now established a rotational cycle to deep-dive into progress in different areas of the business. They say the deep-dive process creates more time for focused discussion, action setting and identifying issues, providing different areas of the business with the opportunity to report back in detail and creating greater senior leadership accountability. Members of the SOR Steering Group report that the structure and way this group functions also creates constructive competition where they can challenge each other and show leadership in their business area.

“Rather than doing general updates at the SOR Steering Group, we use this time to do deeper dives into a particular area. One month we looked at progress in the supply chain, the next month we looked at business operations, and then progress with outside broadcast. This approach gives us a better way of getting the overview on single-use plastic, rather than just a high-level brief update, where we may not get through everything.”

SOR Steering Group Member

To support and input into the SOR Steering Group, staff report that within some of the business units there is a second-tier management structure of working groups that meet regularly. They say that these working groups go into a greater level of detail about progress, targets, blockers and achievements, enabling effective tracking of progress and allowing issues to be dealt with promptly.

“We set up a working group for our team that feeds into the SOR Steering Group. We have monthly meetings with clear responsibilities and accountabilities. This regularity gives us enough time to make changes, but not long enough between meetings to feel like we lose the pace.”

Sky staff member

Measuring Transformation

“First we did an audit – taking all the single-use plastic out and measuring it. Then we went down the list and looked at each item to take it out – either to remove or redesign.”

Sky staff member

Sky staff report that they use a data-driven methodology, which enables them to track progress and identify hard-to-change areas. They say this provides them with a stable foundation to apply the Sky waste hierarchy approach (see Box 1, page 7) on a case-by-case basis.

“Was a challenge to quantify the amount of plastic – not everyone had a baseline of how much product.”

Sky staff member

Although Sky staff say they tried to implement a consistent approach to measurement from the start, the need to establish a baseline quickly meant this was challenging, as the process differed greatly in the business. For example, Sky Product Team staff reported that they already had an existing tracking system for every item that comes in and out and so were able to adapt it. Sky Operations and Event staff reported that they found it more challenging to create a baseline, as they did not have a current tracking system in place for items and therefore needed to create a process for this purpose to help them identify and audit all instances of single-use plastic. Sky staff reported that this initially led to some inconsistencies in measurement, as some business units provided data by item and some by weight. They say this required some additional internal resource to consolidate and validate the different approaches, however, Sky is now working to bring consistency and develop a whole-business overview.

“We have encountered challenges that there are no industry solutions to yet. For example, when transporting our products back and forth they get wrapped in cling film. We haven’t found a solution yet. This process has opened our eyes to how many times a pallet is unwrapped and then rewrapped. We have reduced the number of movements of our product to reduce how much cling film is being used in the production process.”

Sky staff member

One of the challenges that Sky staff reported encountering was the lack of an established approach. This meant that they needed to come up with their own innovative solutions, as alternatives did not necessarily exist. They used an agile process of design, construction and testing, which, at the beginning, included a lot of trial and error to test out different ideas. The Sky Product Team created six guiding principles (see Box 3), iterated in the development of their first single-use plastic free product (see Box 4), which are now being rolled out across the business.

“We opened up every single box, took pictures, took everything out – was very helpful. Handling the packaging helped us understand how customers receive it, the challenge and how they might deal with it. It gave us ideas for potential solutions.”

Sky staff member

Box 3. Sky staff developed six guiding principles for innovation

1. Embrace a process of discovery, trial and error in your approach
2. Challenge the status quo before you try to change it
3. You can bring about business transformation that works towards a cost-neutral solution by reviewing processes as well as products
4. Break action down into manageable chunks
5. Learn the terminology
6. Seek partnership: you cannot do it alone

Box 4: Sky Soundbox packaging



The challenge: to identify and source new packaging for the Sky Soundbox within a 6-week timescale that was single-use plastic free, but did not compromise on the design aesthetic or protection in transit

The solution: through innovating in-house and working with suppliers, Sky found a cost-effective alternative that enabled the Sky Soundbox to be the first Sky single-use plastic packaging free product

The outcome: Sky developed a new methodology for creating single-use plastic free product packaging that has been rolled out across other Sky products, for example, the Sky Q, HUB3 router and NOW TV Stick

Aiming for cost neutrality within existing budgets

“We had to ensure we are cost neutral. If you remove something from the production process, you remove a cost. We are trying to remove packaging where possible, so we can reduce costs. Nothing has come out as a big overall cost increase.”

Sky staff member

Part of Sky’s commitment on single-use plastic is an ambition to achieve cost neutrality over five years (by 2022). Staff say they have strived for cost neutrality in switching to single-use plastic alternatives across the business; however, they recognise that, in some instances, the business will accept increased costs in the short-term while they work towards cost neutrality. They say this has enabled them to innovate and provided greater flexibility to work with suppliers on finding solutions.

“The big challenge from Sky to us as suppliers – to do in a cost neutral way – by virtue of removing things took out process steps. If cheaper in the round Sky would accept. Also, they were clear that they didn’t want to replace one problem with another.”

Sky supplier



4. Engagement: work in partnership to accelerate change

Collaboration is an essential part of delivering system change towards a sustainable economy, whether through working internally with staff or externally with supply chains and key stakeholders. To support single-use plastic removal at scale requires action at different levels. A business can influence directly within their sector through their strategy, practices and purchasing decisions, through raising awareness among consumers, they can change behaviour and by undertaking constructive dialogue with governments, they can catalyse policy change.

Through internal campaigns, awareness raising and supportive infrastructure, businesses can aim to create new organisational norms that are easy and convenient for staff to adopt. If the infrastructure does not exist – for example, access to kitchens to enable the use of reusable cutlery and crockery – it may require investment into alternative innovative solutions. Investing in these changes can help demonstrate business commitment both internally, with staff, and externally, where changes are visible to external stakeholders.

Working through supply chains and with policymakers can support businesses to meet their commitments by shifting whole sectors and systems. Creating a critical mass of companies who are all working towards the same commitment can support innovation, enable implementation at scale and make alternatives more cost effective in the long term. Shifting policy to disincentivise the use of single-use plastic and incentivise innovative alternatives, for example, through a revised producer responsibility system or taxes on plastic packaging items, can encourage more businesses to change.

Internal engagement: Sky created a significant shift in behaviour

“Within the business the mission is visible everywhere. We just removed single-use coffee cups. There are constant videos streaming and updates online. The message has been very quickly disseminated.”

Sky staff member

Staff within Sky say that the campaign is very visible internally and this has helped shift behaviour, creating new norms within the company. Staff say that constant streaming of the Sky Ocean Rescue campaign content and materials has encouraged them and provided a purpose to what they are doing. They say this has also impacted them in their own personal lives, with 92 per cent saying Sky’s campaign has inspired them to reduce personal use of plastic. Their awareness of how much plastic they consume has increased, with one staff member saying they had reduced their family’s personal plastic consumption by at least 70 per cent on a weekly basis.

“Change is very visible in the company – it is hard not to see. Everyone is drinking from reusable bottles and coffee cups. Information is throughout the offices. Interesting how quickly habits form.”

SOR Steering Group Member

An internal survey of staff identified that one of the biggest challenges, especially in the initial stages, was shifting behaviours internally, as a few people were resistant. However, staff say that the scale of internal awareness raising, supported by the personal conviction of a number of staff across the company who have championed the change, has now made single-use plastic free behaviour part of the culture at Sky. They report that this has been supported by investment Sky has made in infrastructure to make using single-use plastic alternatives easy. For example, all staff have been given free refillable water bottles to use at new water refill stations on site, and Sky has provided free refillable coffee cups to all staff.

“The commitment is about driving action. The whole thing is to get everyone to make simple everyday changes.”

Sky staff member

External engagement: Sky worked with suppliers to identify innovative solutions

“We took it to some suppliers and it has galvanised them to change and make their own commitments.”

Sky staff member

Sky staff reported that while engaging with some parts of their supply chain proved challenging initially, it also galvanised some suppliers to implement their own commitments to remove single-use plastic. They report that some suppliers have now implemented their own targets and strategy, which not only affects the products and services they provide to Sky, but also changes how they provide products and services to other customers. They say it has also led to their suppliers making other changes, for example the installation of solar panels.

“We don’t just want to apply the rules to the components we put in our products. We want our suppliers to do it not just because we tell them, but because they see it as the right thing to do.”

Sky staff member

Staff say they have worked with manufacturers to co-create and design products using single-use plastic alternatives. They report that this initially presented a challenge with first-tier suppliers who had not yet created industry processes for single-use plastic alternatives. However, Sky has supported this by investing resource to enable the co-creation of solutions, for example, in making the Sky Mobile SIM card single-use plastic packaging free (see Box 5). Where these processes have not yet allowed Sky staff to identify alternatives to single-use plastic they are seeking innovation funding; for example, to identify a suitable alternative to the single-use plastic shrink-wrap used on pallets in transit, staff have applied to the Sky Ocean Ventures impact investment fund.⁴² Sky staff also report that working with their second, third and subsequent tiers in their supply chain is still a challenge, as they have less influence. The company is hoping to make progress on this during 2019.



Box 5: Sky Mobile SIM card

The challenge: to identify and source a new way of packaging the Sky Mobile SIM card that means the customer does not receive it in a piece of non-recyclable plastic

The solution: Sky and its suppliers co-created a more efficient manufacturing process that enables two SIM cards to be made from one credit card size piece of plastic when only one was made previously

The outcome: Sky customers now receive their SIM cards in a small recyclable card envelope and the excess plastic is now recycled within the manufacturing process

“Cosmetic presentation is paramount to the product. We had to change the supplier’s mindset – what is an acceptable level of cosmetics. Each time the supplier could not resolve they wanted to go back to single-use plastic, however, they have now got it. We have had to engage face to face.”

Sky staff member

Systemic change: Sky influence beyond the business

“At Sky, we don’t want it to be a flash in the pan – we want to ensure it is sustainable and keeps a legacy going.”

Sky staff member

Staff report that the Sky approach is about cultivating a new business opportunity now rather than waiting for external intervention by government or an industry body to mandate a need to change. Staff are actively seeking solutions, with a vision to increase action and change industry. They say that Sky has used its communications platform to make its single-use plastic free mission public, transparent and an open invitation to anyone to participate.

“We would love to see what our suppliers have done for Sky filtering through to other manufacturers.”

Sky staff member

Sky staff say the company has leveraged its market position to challenge industry, policymakers and customers to remove single-use plastic themselves. Staff say that the company has an ongoing dialogue with policymakers on eliminating single-use plastic, and in May 2018, Sky responded to the UK Government’s call for evidence to explore how changes to the tax system or charges could be used to reduce the amount of single-use plastic wasted.²² Sky staff believe that further legislative changes, such as revisions to the producer responsibility regulations, taxation for plastics or improving recycling collection and processing infrastructure, could not only further support the implementation of their commitment, it would also incentivise other businesses to do the same.

“A policy and tax environment that supports companies to move to non-plastic products would make it easier for businesses to shift.”

Sky staff member

Transferable learning: how businesses can act to remove single-use plastic

The Sky case study shows that it is feasible to take action on single-use plastic across a business to help slow the flow of this material into the economy. While some businesses are already taking action and have set their own strategies to remove single-use plastic, commitment is required from a greater number of businesses if we are to achieve both national and global commitments on plastic packaging and eliminating single-use plastic.

For businesses considering how to remove single-use plastic from their operations, services and products, learning from the Sky case study shows the following:

- Using the proposed approach (see Figure 5) can accelerate change within a business. All three elements underlying the strategy are essential; if one is less apparent this could affect the ability of a business to deliver against its commitment:
- 1. Strategy:** setting an ambitious target to remove single-use plastic from all operations, services and products can provide a company-wide mandate to inspire and embed change at all levels.
- 2. Leadership:** embedding in culture, values and leadership at all levels can create an environment that encourages change through enabling a shared sense of ownership and responsibility by staff to act on achieving the targets unprompted.
- 3. Management:** implementing effective governance and accountability can support targets to be embedded, especially when supported by clear management structures, consistent monitoring and measurement.
- 4. Engagement:** working in partnership can accelerate change both internally through engaging staff and externally through working with supply chains and policymakers to shift whole sectors and systems.

- While it is possible for businesses to eliminate or make significant reductions in the use of single-use plastic, for some areas, such as health and safety, security or needs-led use, removal may be more challenging, especially for businesses where these items are part of their core product offering. In these instances, working in collaboration to identify ideas and exploring alternative delivery models could lead to potential solutions in the longer term. Even if these businesses only make minor reductions in the volumes of single-use plastic they produce, they could still contribute to total reductions in the use of single-use plastic, and while doing so, increase the overall sustainability of their business.
- An agile process of design, construction and testing may be required to identify alternatives, including trial and error to test ideas. It is important when selecting alternatives to understand the relative environmental and cost impacts, for example, through undertaking lifecycle or environmental profit and loss analysis. Where it is not possible to find a non-plastic alternative currently, taking a waste hierarchy approach can lead to solutions that are at a minimum recyclable through a more circular approach to design that considers end-of-life impact. Investment in innovation and working with supply chains can also enable ideas to emerge and support wider sectoral change through influencing the products those suppliers provide to other customers.

We hope that more businesses will follow Sky’s example and take action to address single-use plastic use in their business, and that the proposed approach above will support them in implementing their commitments.

If all UK companies committed to go single-use plastic free, an estimated total of 43 million tonnes of single-use plastic could be removed from the economy by 2025,* the equivalent of nearly 17,500 Olympic-sized swimming pools.

Figure 5: How businesses can act to remove single-use plastic



Work with us: If you want to work with CISL on addressing the issue of single-use plastic please contact: info@cisl.cam.ac.uk

* see Appendix for detailed calculations

Appendix

Detailed calculations and assumptions behind estimated predictions

Prediction 1:	If all EU companies committed to go single-use plastic free, an estimated total of 345 million tonnes of single-use plastic could be removed from the economy by 2025.
Source:	Eurostat packaging waste statistics ⁴³
Source figure:	Plastic waste packaging figures for the EU (2014, 2015, 2016)
Calculation:	Estimated year on year growth between these three time periods, and added year on year growth per year for plastic waste packaging
Source:	PlasticsEurope analysis of European plastic production, demand and waste data ⁹
Source figure:	39.9 per cent of plastic demand for packaging
Calculation:	Breakdown Eurostat plastic waste packaging statistics into plastic waste and single-use plastic waste
Calculation:	Use year on year growth calculation to calculate the breakdown of single-use plastic waste per year as a projection
Calculation:	Add together single-use plastic projections for 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025
Calculated figure:	345,484,776 tonnes
Prediction 2:	If all FTSE 100 companies encouraged their employees to take action, they have the potential to reduce single-use plastic consumption by approximately 2.3 million tonnes per year.
Source:	The Financial Times Stock Exchange (FTSE) 100 list ⁴⁴
Source:	FTSE 100 staff count ⁴⁵
Source:	Eurostat plastic packaging waste generated per EU citizen ⁴⁶
Calculation:	Packaging waste per EU citizen multiplied by the number of employees at FTSE 100 companies
Source:	PlasticsEurope analysis of European plastic production, demand and waste data ⁹
Source figure:	39.9 per cent of plastic demand for packaging
Calculation:	Divide the EU plastic packaging waste generated per EU citizen figure into single-use plastic waste using PlasticsEurope statistic
Calculated Figure:	2,260,112 tonnes
Prediction 3:	If all UK companies committed to go single-use plastic free, an estimated total of 43 million tonnes of single-use plastic could be removed from the economy by 2025.
Source:	Eurostat packaging waste statistics ⁴⁴
Source figures:	Plastic waste packaging figures for the UK (2014, 2015, 2016)
Calculation:	Estimated year on year growth between these three time periods, and added year on year growth per year for plastic waste packaging
Source:	PlasticsEurope analysis of European plastic production, demand and waste data ⁹
Source figure:	39.9 per cent of plastic demand for packaging
Calculation:	Breakdown Eurostat plastic waste packaging statistics into plastic waste and single-use plastic waste
Calculation:	Use year on year growth calculation to calculate the breakdown of single-use plastic waste per year as a projection
Calculation:	Add together single-use plastic projections for 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025
Calculated figure:	42,903,876 tonnes

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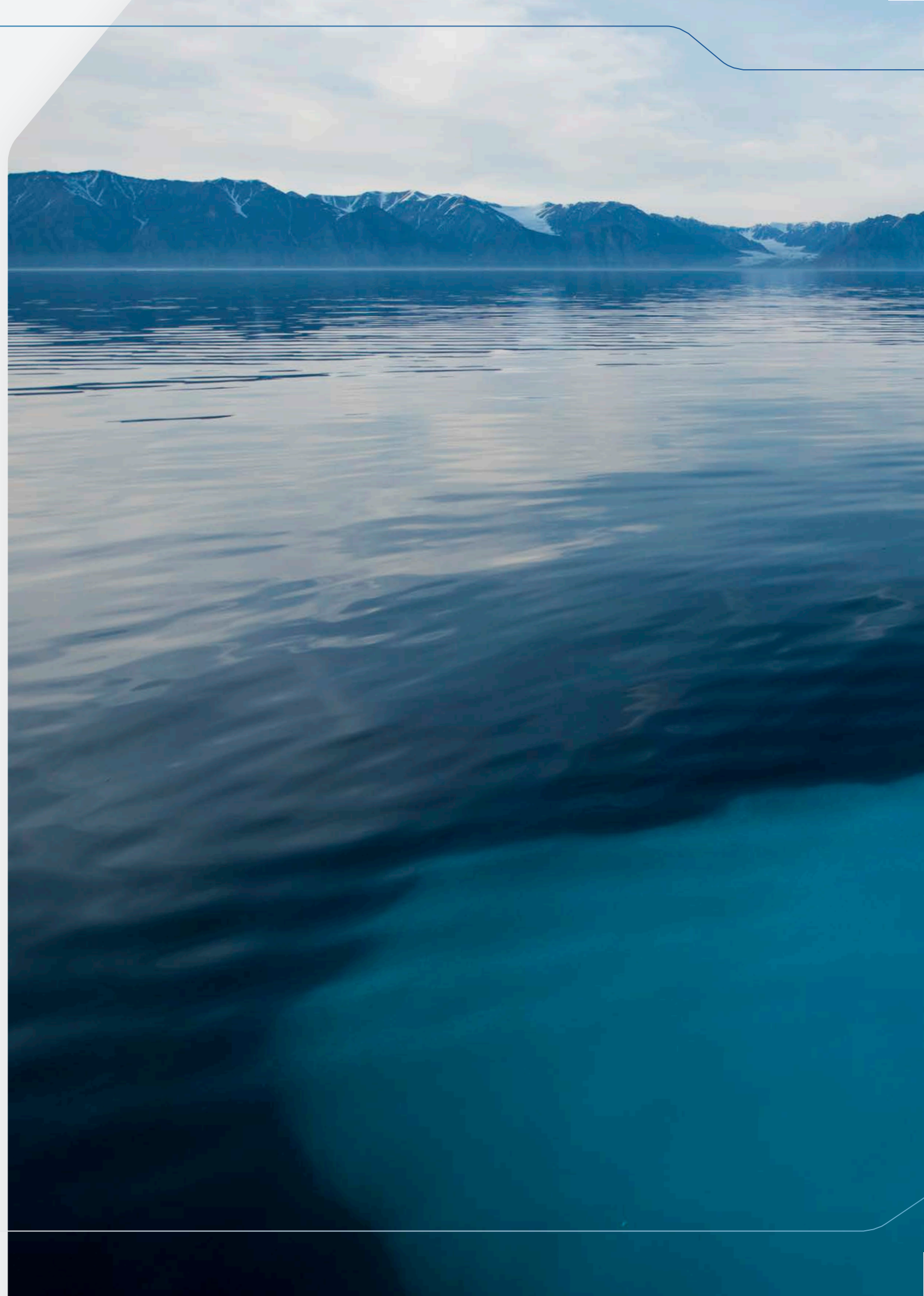
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