

# Competition Law and Antitrust Guidelines

1. All Addressees shall perform their activities under the Association in accordance with the applicable domestic and international competition/antitrust rules and regulations. The following principles cover the main issues, but are not intended to be exhaustive.

2. Addressees must keep in mind that competition can not only take place on the product level but also with regard to Association technologies or services.

3. Addressees must not, under any circumstances, agree:

- to fix prices, including any component of price and factors with price relevance;
- to fix output levels, including capacity utilization levels;
- to allocate customers, markets, quotas or market shares
- to rig bids;
- to organize or execute collective boycotts of customers, competitors, suppliers (including of technologies);
- to coordinate with regard to investments or closures;
- to adhere to standards (other than those mandated by applicable laws or regulations) or not to adhere to standards, in particular in the sustainability context;
- on how or when technological changes will be implemented, in particular in the sustainability context; or
- not to pursue technological developments that would go beyond and above the legal requirements ("over-fulfilment"), in particular in the sustainability context,

nor must they exchange any commercially sensitive information related to the above topics (i.e., information relating to the present or future competitive conducts of the Members). Commercially sensitive information includes detailed and non-publicly available information on a Member's specific know how/patents or plans or internal strategy with regard to specific technologies. Commercially sensitive information can only be exchanged in line with applicable antitrust laws as assessed by qualified legal counsel

# Global Impact Coalition

The enabling platform for a net-zero and  
circular chemicals future

November 2025

# Enabling a **net zero** and **circular** future for chemicals



## Who

Incubated at the **World Economic Forum**, we are change-makers from leading global companies in the **chemical value chain**, guided by CEOs & senior executives.



## Why

We are actively collaborating to build commercial ventures to solve the greatest challenges of the chemical value chain that cannot be tackled alone.

We accelerate projects to:

- ❖ Reduce carbon emissions
- ❖ Increase circularity
- ❖ Pursue alternative feedstocks

## What

We provide an enabling platform to co-create & accelerate tangible solutions.



Scale up innovative technologies



Develop new business models



Build proof-of-concept pilots

## How

We guide members through a **rigorous 4-step** co-creation process.



# Once projects are established, they spin-out of GIC for implementation on the ground

*projects spun-out in 2025*



## R&D Hub for Plastic Waste

A hub for R&D focused on developing new technologies for waste processing with a lower carbon footprint and greater levels of plastic waste recycling. Now guided by TNO with 7 GIC companies



## Electric steam cracker furnace

The world's first demonstration plant for large-scale electrically heated steam cracker furnaces. (between GIC members BASF and SABIC together with Linde)



## Circular Plastics Refinery

A proof-of-concept project using new plastic waste processing technologies to enable more plastics to be recycled while reducing emissions along the value chain



## Direct Conversion

A joint R&D effort led by ETH Zürich exploring commercial C2+ gasification by expanding process routes to convert complex municipal waste streams to C2+ monomers or liquids



## Sustainable Olefins

A toll manufacturing MTO unit with individual supply and off-take commitments. The project is currently at the pre-feasibility stage, assessing key technical and economic investment parameters

# GIC's Portfolio | 8 Active Projects



## Sustainable feedstocks and base chemicals

### Sustainable Methanol

Assess and define proposal for joint waste gasification-based methanol value chain

### Sustainable Biomass Sources

Evaluate techno-economic viability and feedstocks to develop bio-based olefines

### Circular Municipal Solid Waste

Assess optimal circular pathways for MSW to derive sustainable raw materials

### Pyoil

Jointly invest in pyoil production or upgrading facility to scale demand

## Circular plastics

### Automotive Plastics Circularity

Pilot end of life vehicles recycling to assess feasibility & secure closed loop polymers

## Low-emission processes

### EDHOX Commercialization

Jointly commercialize & de-risk EDHOX tech to produce low emission ethylene

### Oxycombustion Demo

Jointly demonstrate & de-risk Oxycombustion facility, to reduce 90% cracker CO<sub>2</sub>

## Safety

### PFAS Destruction

Pilot most effective technologies to destruct short-chain PFAS in process water

# Direct value for members



## Neutral convener:

**Trusted platform** bringing together chemical industry giants under a solid legal framework



## Faster results:

Pilot and test game changing opportunities **within 12 months** through structured, well-governed projects



## Shared resources, lower risk:

Pool resources to advance **high-impact initiatives** at a **fraction of the cost** of going alone



## From ideas to scalable impact:

Transform collective **company ideas** and market needs into **validated business cases** for tangible impact



# Beyond projects: added benefits for members

## Public Engagement Visibility & Voice

- **Speaking opportunities** at industry-leading conferences & events
- **Webinars** & curated online sessions
- **Thought-leadership** articles & media exposure
- Ongoing promotion via **digital channels**

## Value Chain Partners Downstream Customer Engagement

- Dedicated membership channel
- Enable **market pull & demand signals**
- **Ensure alignment** of sustainability goals
- **Faster scale-up of solutions**

## Innovation Ecosystem Cutting-Edge Access

- **Structured innovation intake**
- Direct **engagement with start-ups**
- **Early access** to emerging tech & trends

# Bringing key industry customers to the table as Value Chain Partners

## The Need

Customers at the table

### Customers drive demand.

GIC's Value Chain Partner model ensures downstream pull, early validation and scale

## The Solution

Value Chain Partner (VCP)

GIC launched the VCP to bring customers directly into our ideation sessions and ongoing projects

Active discussion with 10+ companies



## The Value

Benefit for GIC members

- 1 **Tackle priority challenges in an open, cross-industry format** that no single company can solve alone
- 2 **Secure early customer commitment** → derisk investment by validating demand before scale-up
- 3 **Accelerate commercial scale** → customer pull shortens time from pilot to market adoption

# Our governance structure

## CEO Advisory Board

Strategic advisors



## Executive Committee

Decision-makers



## Working Group Members

Project drivers



Role

- Shape priorities through guidance
- Provide high-level strategic direction
- Propose new project ideas

- Approve projects and partnerships
- Oversee operations and governance
- Set rules and policies

- Drive projects & deliverables
- Provide technical expertise
- Collaborate across companies

Who's involved



Markus Kamieth  
*Chief Executive Officer*  
BASF



Conrad Keijzer  
*Chief Executive Officer*  
Clariant



Fiona van den Brink  
*Senior Director Innovation Platforms*  
LyondellBasell



Waleed Al-Salfan  
*VP Corporate Sustainability*  
SABIC



Sebastien Righini  
*Scientific & Open Innovation Director*  
Syensqo



Lisa Weigand  
*Advisor Circular Economy*  
Mitsubishi Chemical Group

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# GIC Project Portfolio

# Automotive Plastic Circularity Pilot



## Objective

Pilot and evaluate the technical and economic feasibility of closed-loop recycling of polymers from End-of-Life Vehicles (ELVs). Build the foundation for a scalable system in Europe.



## Key Deliverable

European pilot processed 100 ELVs across 15+ polymer types; deliverables include technical feasibility, cost structures vs. virgin feedstocks, and learnings/recommendations for industry scale-up with OEM engagement.



## GIC member company resources

Set aside capacities to accompany external recycling pilot & conduct internal recycling tests.



## Duration

12 months until end of 2025, including internal recycling tests. Proposal for Phase 2 to define what it takes to reach economic viability and scale for ELV recycling: Jan 2026 onwards (To be defined; Proof of economic viability)

# Circular Municipal Solid Waste



## Objective

Collaborate across value chain to **increase circularity of MSW** to reduce landfill and create sustainable products.



## Key Deliverable

Transform MSW into renewable feedstocks, define optimal technology pathways, align waste systems, and validate efficiency through pilot testing.



## GIC member company resources

Working group, potential technology providers (using existing assets), and municipalities. TNO selected as 3<sup>rd</sup> party consultant for Phase 1.



## Duration

4-6 months Phase 1 research + Phase 2.  
Optionally 18 months piloting or merger with another GIC WG.

# Sustainable Biomass



## Objective

Evaluate the economic viability of bio-based chemicals by assessing favorable feedstock types (agri/forestry residue or organic MSW) and piloting a relevant conversion technology (gasification or enzymatic hydrolysis + fermentation).



## Key Deliverable

**Phase 1-2:** Define route, prioritize feedstocks, engage partners, business case.

**Phase 3:** Prepare pre-feasibility through contracting and planning.

**Phase 4-5 :** Conduct pre-feasibility and pilot testing with partners (outside GIC).



## Project Impact

Open-up a potential route for bio-based chemicals with reduced carbon footprint. (60-90%<sup>1</sup> reduction in carbon intensity compared to fossil alternatives).



## Duration

14 months for three key phases (with three key stages incl. preliminary assessment and piloting).

# Short-chained PFAS destruction technologies



## Objective

Identify the most effective, technically feasible & economically viable destruction technology for short-chained PFAS in process water.



## Key Deliverable

Screen technologies and regulations. Validate potential through lab trials.  
Pilot selected solutions at member sites.  
Build knowledge base and action roadmap – joint procurement of solutions.



## Project Impact

Accelerate the knowledge foundation for GIC members to:

- 1) Destroy short-chained PFAS in process water.
- 2) Test own commercial PFAS destruction solutions.



## Duration

**Technology screening study:** ≈ 6 months .

**Lab-based trials:** ≈ 6 months.

**Member site pilots:** ≈ 12-18 months.

# Sustainable Methanol



## Objective

Evaluate and prepare proposal to jointly develop a viable waste gasification – based sustainable methanol supply chain.



## Key Deliverable

Assess methanol potential from waste gasification, propose suitable locations and shortlist technology providers, build business case and model, and prepare pre-feasibility proposal.



## GIC member company resources

Capacity to analyze and detail joint methanol supply chain.



## Duration

10 months, March-December 2025 (after which 3 months potential prep for pre-feasibility study)



## Assessed Capacity

Different scales (100 ktpa and 500 ktpa) of methanol capacity to be evaluated.

# Oxycombustion demo for CO<sub>2</sub> capture in chemical production



## Objective

Generate model from joint Oxycombustion pilot facility for tech roll-out and business case by collectively de-risking and ultimately reducing steam cracker furnace emissions by 90%.



## Key Deliverable

Engineering study for a typical cracking furnace revamp, based on engineering cost sharing between partners.



## GIC member company resources

Initiate search for third partner to begin technical definition phase.



## Duration

5 months initial assessment, followed by 7 months technical definition phase, before moving to feasibility study.



## Assessed Capacity

90% of Scope 1 GHG emissions reduction per cracking furnace, approx. 1 MTA per world scale cracker, potentially 26 MTA if applied to all crackers.

# EDHOX™ technology: Blue Ethylene via oxidative dehydrogenati on (ODH) of ethane



## Objective

Develop production consortium to fully commercialize EDHOX technology in brownfield approach de-risking endeavor by sharing CAPEX, potentially OPEX and operational experience while producing low carbon footprint ethylene.



## Key Deliverable

Definition of ODH demo unit capacity, location & feedstock supply. Structure, business model & roles of the consortium. High level business case, CAPEX & OPEX sharing between partners. Agreement on product quality specification.



## GIC member company resources

TBC: Cooperation between Clariant, LYB and at least 1 additional ethylene producer + integration of Linde as licensor.



## Duration

TBC: 21 months until decision to proceed with engineering and construction of demo ODH unit.



## EDHOX technology benefits (compared to ethylene from steam cracking)

Ethylene production with 70% lower energy use. ≥60% Scope 1 emissions cut; potential net-zero Scope 1 & 2 via full electrification. Competitive CAPEX/OPEX for scale-up.



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To find out more, visit [globalimpactcoalition.com](https://globalimpactcoalition.com), connect on [LinkedIn](#), or email us at [contact@weraregic.com](mailto:contact@weraregic.com).