

TOWARDS A RESOURCE EFFICIENT EUROPE

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EU predicts 'waste tsunami' if world fails to cut down trash

The European Commission is preparing new policy proposals to reduce waste and reach greater recycling rates, in order to move towards a zero-refuse economy.

“The way in which our society has produced and consumed so far is simply not sustainable any longer,” said Karl Falkenberg, who heads the European Commission’s environment directorate.

Speaking at a EurActiv event last Tuesday (18 March), the Commission director-general warned that with a global population set to grow to 9.6 billion by 2050, the world had no choice but to dramatically cut down on waste or face a severe environmental backlash.

“We are going to be hit by a tsunami of waste if all of those additional people coming to this planet – essentially in the developing world – start consuming like we do in Europe,” he warned.

“But it requires a fairly fundamental change in our attitude. We need to ensure that waste is not a dirty marginal activity



Photo: Ulrich Mueller/Shutterstock

of our economies but that we put waste at the centre of a circular economy.”

Separate targets for different waste 'streams'

The EurActiv event focused on packaging waste, one of the five streams identified under EU waste rules, which

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are currently being revised. Giving the audience a foretaste of things to come, Falkenberg said his services were working to ensure that the best practices of leading member states were being shared by all.

“We think that there is a role for a European regulator to set targets,” Falkenberg said. “We are not convinced unfortunately that, on their own, industry, consumers, municipalities, or nations are sufficiently fast-moving in the direction where we need to move if we want to be sustainable.”

“So we think we need to set targets for those different [waste] streams,” he said.

The proposed revision may introduce an overall recycling objective of up to 70% and a landfill ban, according to industry sources in Brussels.

But perhaps the Commission's biggest challenge will be getting European countries to streamline their national waste collection and recycling schemes.

The EU's 2008 Waste Framework Directive calls for recycling of at least 50% of household waste by 2020. But the legislation, which calls for a European “recycling society”, has apparently failed to reach all corners of the Union.

Bulgaria is the EU's most wasteful country, dumping all of its municipal trash, according to a report by Friends of the Earth Europe, published last year. Germany was the greenest of the EU 27, dumping none of its waste and recycling 45%.

Huge price differences

Addressing those disparities will not be easy. The EU's packaging directive requires producers to contribute to local waste collection and treatment schemes, a concept referred to as Extended Producer Responsibility (EPR). But the way those schemes have been implemented varies enormously across the European Union.

Olivier De Clercq, an official working for Falkenberg's environment

directorate, underlined lack of data and transparency about how municipalities finance the multitude of waste collection and treatment schemes in place across the 28-member bloc.

“The variety is not only in terms of performance, it is also the fees that are paid by the producers,” De Clercq said. An independent study carried out for the Commission ahead of the May waste review, showed that the average fees charged to producers ranged from €14 to €200 per ton for the same mix of packaging streams.

“One of the conclusions is that the most costly systems are not necessarily the most effective,” De Clercq said. “You can have an efficient system with a low cost.”

The price difference may be explained by the extent of services covered by the various schemes, which may include only household waste or all types of waste. However, the overall conclusion is not reassuring. “There is a huge challenge in terms of transparency regarding EPR,” De Clercq said, pointing to “huge differences in terms of access to data” between countries.

Stéphane Arditi, an environmental campaigner at the European Environmental Bureau (EEB), is not only worried about price differentials. “When I see this broad range of fees for the same service, I am also concerned about the quality of the service,” he told the audience at the event.

Indeed, the quality of the service may vary widely. Some facilities recycle only 50% of waste but others reach 95% because they sort out and pre-treat waste upstream, which is more costly. “Can we call this the same service? I'm not sure. So I think we need to set some basic standards that are accepted by all so that we are sure that we are talking about the same quality of service,” Arditi said.

Call for greater harmonisation

For the obliged industry paying for

the schemes, greater harmonisation will eventually be needed if higher recycling rates are to be reached.

“We need to understand how these costs work,” said Martin Reynolds, the Chairman of Europen, an industry body working to address the environmental challenges of the packaging supply chain.

Reynolds accepts that “there is a cost that industry has to bear” for waste collection and treatment, but called for greater transparency and inclusiveness in how local waste treatment schemes are managed.

“We can do more and we would want to do more,” he said. “But in doing that, I think that gives us an entitlement to have some control over both the efficient running and the cost management of those schemes so that we can reach whatever the target is going to be.”

“Whatever the targets, there are some things that we need to do in terms of understanding and putting in place clear structures for getting things done,” Reynolds said.

Arditi, for his part, doubts that the Commission will be bold enough to mandate a greater harmonisation of national waste legislation. “At the moment what is not clear to me is whether the Commission will have the courage to [...] set minimum requirements on member states in terms of how we orchestrate EPR, what is the shared definition.”

“If the Commission produces only a guidance document with recommendations, then I think it is going to be very weak document. So what I'm missing at the moment is the intention of the Commission.”

Seeking to address those concerns, Olivier De Clercq said the Commission was resolute in its intentions. “In terms of economic instruments, we clearly want to provide more guidance for the member states. We would like to increase the cost-effectiveness but also the enforcement, the transparency, and the monitoring to ensure that the market is functioning well,” he said.

Belgium takes out the trash

Belgium's waste disposal system - in which residents leave coloured bin bags in the streets for collection - has drawn criticism for being unsightly. But critics may not be aware that the country is considered relative disposal "paradise" amongst experts.



Photo: Emiliano/Flickr

With Europeans throwing away 3 billion tonnes of waste every year, and the world population set to rise, mitigating the problem has become a priority at the EU level.

"We are going to be hit by a tsunami of waste if all of those additional people coming to this planet - essentially in the developing world - start consuming like we do in Europe," said Karl Falkenberg, the head of the European Commission's environment directorate.

A number of European countries are trying to swim against the tide, virtually phasing out landfilling, and rapidly increasing their levels of recycling. According to the Commission, Denmark, Germany, Austria, Sweden and Belgium are the "most advanced" EU countries, dumping less than 3% of municipal waste, sticking most closely to the targets set in the 2008 Waste Framework Directive, which calls for the recycling of at least 50% of household refuse across the Union, by 2020.

Behavioural change

As with any successful initiative, it is people that make it work. Experts credit "behavioural changes" for the success of these countries' waste management strategies. To Olivier de Clercq, a policy officer for waste management and recycling in the Commission's environment directorate, financial incentives are the key.

"In Belgium, the less you sort, the more

you pay," he told EurActiv, at a conference at the Brussels Press Club last week, referring to the northern European country's public-private pay-as-you-throw (PAYT) schemes.

In Belgium, residents are required to distribute their waste between three and four differently coloured bags - one for general refuse, for the dump, one for plastics, one for cardboard and another for 'garden waste'. The general bag costs the most. In the Flanders region, residents can pay more than €2 per bag of waste intended for the dump, up to five times more than they pay for bin bags sorted for recyclable waste.

"Financial incentives are changing behaviour," de Clercq said.

Residents can also be given fines if they do not sort their refuse properly, though most infringements result in a warning from the local municipality. Belgium now recycles or composts 57% of its municipal waste, according to data released yesterday (25 March) by Eurostat, the EU's statistics office.

The statistics are similar in Germany and Austria, at 65% and 62%, respectively. They also work according to PAYT, however using a system in which citizens pay a charge based on the weight of their waste.

Communication is key

There is also another side to the waste debate: the need for communication campaigns. The European Commission has launched its own campaign, 'Generation

Awake', which features animated short-films aimed at informing citizens and inspiring them to waste less and recycle more. 'Generation Awake' has been one of the Commission's most successful campaigns, with one of the videos being watched over 2 million times.

The Commission's environment directorate has also drawn on celebrity pulling power, inviting British actor Jeremy Irons to the launch of its public consultation on plastic waste.

Irons presented, in tandem, his documentary on waste, 'Trashed', and urged the public to shoulder some of the responsibility for dealing with the blight.

Experts at the Brussels conference echoed the call for grassroots action. "We need to [inform] consumers of why they're recycling, (and) how to recycle", said Vanya Veras, the secretary general of Municipal Waste Europe. "We need to close that communication loop".

Extended Producer Responsibility

However, tackling the waste challenge goes beyond household and municipal organisation, with policymakers etching out an important role for industry, or 'Extended Producer Responsibility' (EPR) schemes, in particular.

Under EPR, producers are responsible for the products they put on the market,

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whether a drink container or a car tire, for their entire life cycle. Companies therefore pay for some of the costs associated with reprocessing their product.

To Stéphane Arditi, from the European Environmental Bureau, a green campaign group, offering incentives for good environmental practices could work well with the private sector. “Companies which produce packaging that’s better for re-use or recycling should pay less,” he said.

The Commission’s Falkenberg supports a similar approach, advocating EPR schemes that provide an incentive for producers to take environmental considerations into account throughout a product’s lifecycle.

Businesses are also aware that packaging plays an important role in how they are perceived by consumers. Hans van Bochove, the vice-president of public affairs for Coca-Cola, said, “Packaging for us is important from a reputation point of view”.

The European Commission is set to publish in May a communication on the so-called circular economy as part of the ongoing review of waste legislation. Experts hope that EU-level action on waste can bring about the sea-change needed to avert the waste “tsunami”.

According yesterday’s Eurostat release, EU countries have significantly increased the share of municipal waste they have recycled or composted, from 18% in 1995 to 42% in 2012.

Game on for 30% binding resource efficiency target by 2030

The European Commission’s environment directorate is pushing hard for a binding target to increase Europe’s resource efficiency 30% by 2030 as part of a waste review due to be published in May, EurActiv has learned.

The move, which would be accompanied by a policy paper about the circular economy, will be stoutly opposed by other Commission directorates and states such as the UK concerned about short-term costs to industry.

But the battle lines may be less clearly drawn than in the fracas over 2030 climate targets, due to the earlier economic gains that resource efficiency may bring.

“It is crazy that about 80% of what we produce is used once and then thrown away,” Joe Hennon, a spokesman for the environment commissioner, Janez Potočnik, told EurActiv. “If businesses use less resources and develop products that use less energy, water and raw materials, it is in their own

interests as the prices for all those will only be rising in the years ahead.”

Hennon declined to comment on the headline 30% figure but said that the mandatory nature of any targets “will of course be discussed in the Commission, as well as in Parliament and Council.”

The EU currently has an aspirational goal to virtually eliminate landfilling by 2020, and binding objectives of recycling at least 50% of all household waste by 2020, and collecting 45% of all batteries by 2016.

“There are already mandatory targets for waste and we would intend to introduce new ones based on the need for them,” Hennon said. “Expect something on marine litter and construction and demolition waste, food waste, hazardous waste, plastic waste and possibly recycling phosphorous.”

Other flagged measures could include green public procurement and a harmonisation of methodology used by EU states to calculate the percentage of waste they recycle and compost.

“The bottom line is that we need to do something about the way we produce goods and how we deal with waste,” Hennon said.

Waste overflow

A third of the EU’s annual three billion tonnes of waste is currently dumped in landfill sites, which can contaminate groundwater and aquifers and release large quantities of methane, a highly potent greenhouse gas, in decomposition. Another quarter of Europe’s waste is incinerated, in a process that environmentalists say can

produce significant amounts of dioxins and furans that can be hazardous to public health.

The share of municipal waste composted or recycled has increased massively – from 18% in 1995 to 42% in 2012 - according to Eurostat figures. But these numbers mask huge regional variations between states in the continent’s North and West, and in its South and East.

While Germany’s waste recycling and composting rate was an impressive 65%, Romania’s was just 1%. And where Austria reached 62% in the table, Serbia which is not an EU member, landfilled 100% of its trash.

French authorities though have complained that Eurostat’s reporting methodology is not harmonised across the continent. As a result, Germany can boast a ‘zero landfill’ record, while still landfilling incineration ashes and residual waste from recycling processes, they say.

The figures can also hide other anomalies. Even in countries such as the UK, which recycled or composted 46% of its waste, rubbish on beaches reached a two-decade high last year with 2,390 items of trash for every kilometer surveyed by the Marine Conservation Society.

Industry: No waste ‘taxation’ without representation

The way municipalities charge for waste treatment is also attracting increased scrutiny.

The EU’s packaging directive requires producers to contribute to local waste

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collection and treatment schemes, a concept referred to as Extended Producer Responsibility (EPR). However, industry voices are demanding a say in how those schemes are managed, and financed, if they are going to pay for them. Average fees charged to producers ranged from €14 to €200 per ton for the same mix of packaging streams according to a study carried out for the Commission ahead of the May waste review.

Speaking at a EurActiv conference in Brussels on 18 March, Coca-Cola's Vice President of Public Affairs, Hans van Bochove, raised the famous slogan of the American revolution: "No taxation without representation".

"If it is decided that we as an industry are financially responsible for all of this, then obliged industry has to be at the helm when it comes to deciding how [it is regulated]," he said. "If I am responsible for paying for this, you can rely on me to drive costs down while trying to achieve maximum effectiveness."

Coca-Cola is one of the world's largest users of recyclable Polyethylene Terephthalate (PET) bottles and has cut its carbon footprint through the use of recycled aluminium cans, as well as developing recovery initiatives, such as "bring" systems. It also has an ambitious internal recovery target of eliminating 100% of waste in its production facilities, by intensified recycling. Such schemes are "critical from our reputational perspective," van Bochove said.

"We can do more and we would want to do more," said Martin Reynolds, the Chairman of Europen, an industry body working to address the environmental challenges of the packaging supply chain. "But in doing that, I think that gives us an entitlement to have some control over both the efficient running and the cost management of those schemes so that we can reach whatever the target is going to be."

Environmentalists, for their part, fear that this could lead to the adoption of a lowest common denominator position. "I was worried by [van Bochove's] impression that because they are paying, they should be



given full control or power on how we should handle our waste," said Stephane Arditi, the senior waste policy officer for the European Environmental Bureau (EEB). "It is a bit dangerous as waste is also a matter of public service, health and environment policy that cannot be delegated to private companies and businesses."

Cherry-picking

Interestingly, a degree of consensus has emerged between NGOs and multinationals over principles such as the earmarking of municipal fee collections for recycling. The EEB wants to see around 20% of total waste management costs covered by local authorities.

The NGO community is also increasingly supportive of certified takeback schemes to ensure that private sector initiatives for recyclable products are not damaged by 'cowboy collectors' who cherry pick products with the highest short-term resale value, and then withdraw from the market when the commodity price drops.

Van Bochove said: "When you set higher targets for us all to achieve, to protect obliged

industry from being cherry picked on, it is critically important that EPR (extended producer responsibility) schemes be a transparent way of driving higher collection and recycling of packaging, and not a tool to make industry the paymaster of a range of diverse interests."

"That's a concern that we can share," Arditi said. "We want to create incentives for reducing waste generation and moving towards a circular economy where our waste is reused as secondary raw materials as much as possible."

"If you steal part of the valuable material from obliged industry, you don't provide the right incentive for them to recover their investment and go for better designs," he added.

The EEB will soon publish its own paper for new resource efficiency and waste targets, including a renewed call for the 'zero landfill' concept to be extended to incineration disposal, within the context of a fully circular economy.

As EU officials attempt to close the door on one battle over 2030 climate targets, another one appears to be in the process of opening.

Waste sector calls for fair competition and 'no grey zones'

Industry leaders united around a call for fair, transparent and universal minimum extended producer responsibility (EPR) requirements in an ongoing review of EU waste management targets, at a Brussels conference last week.

The European Commission is considering whether to set new targets for waste recovery and recycling, and exploring options for clarifying and simplifying existing legislation, in a proposal due out later this year.

EU member states, such as the UK, oppose new binding obligations, arguing that "the European Commission should find ways to help member states implement existing targets before setting new targets."

But several industry spokespeople and waste management experts begged to differ at the symposium, which was held on 18 March at the Brussels Press Club.

"From my experience, industry is ready to endorse EPR under two conditions," said Professor Christoph Scharff, the CEO of Alstom Recycling AG Austria, a stock corporation. "Number one is that the regulation makes sense from an ecological point of view. Number two, that there are no loopholes and no grey zones to escape the legislation. The risk I see is of a dysfunctional competitiveness based on free riding."

Without a rules-based system for companies, markets would be stronger than laws, he argued. "We need targets," he said, "otherwise recycling will only operate under market conditions in favourable times and we remember what happened in 2008/9 when recycling markets collapsed, so we need a framework."



Even so, he called for flexibility in the rule's application to take into account differing conditions across the continent. An OECD spokesman echoed this, noting that different measures might be acceptable to authorities in a 'start-up phase'.

Olivier De Clerq, a waste management policy officer for the Commission, referred to "big challenges" in some countries like Romania and signposted "proposals regarding the ensuring of fair competition."

"We directly have to stress the role of the public authorities," he said. "In the end there is a strong need for enforcement, a good framework, data collection and monitoring and clear sanctions and control on free riders when these are not met."

Recycling target

By 2020, the EU has set a target for recycling at 50% or more of all household municipal waste, within its waste framework directive. But the European Court of Auditors has criticised the bloc's waste management infrastructure, which has received €10.8 billion in structural funding since 2000, for "limited" effectiveness.

Eurostat figures show that 37% of the average European's waste ends up in landfills – the least environmentally friendly form of disposal – and 23% is incinerated, a less damaging but still wasteful practice,

as it destroys the potential value of recycled waste.

By contrast, a quarter of waste is recycled, and 15% is composted. However, these figures hide great regional variations, and disputes about the veracity of figures provided from some southern and eastern European states. The price put on a tonne of waste can vary from €14 per tonne to €200 per tonne, the conference was told.

Simon Webb, the government relations manager for consumer-products company Procter and Gamble, said that regulations had to ensure all actors adhered to a common set of principles, including: transparency, geographical scope, tendering procedures, and materials covered.

Cherry picking

"Cherry picking or a limited [regulatory] scope undermine the whole system and lead to a race to the bottom so minimum requirements and enforcement of EPR are needed," he told the audience of waste management professionals.

A lack of consistency, clarity and enforcement in the current legislation made it difficult for industry to meet its obligations – and for member states to meet their targets, he argued.

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“We need minimum requirements,” Webb said. “We need to ensure that they are enforced. There has to be some harmonisation of reporting, and clarity on roles and responsibilities. Industry oversight is very important to control costs and incentivise performance. If we pay, we want to decide the way.”

Korrina Hegarty, environment policy director of the European Committee of Domestic Equipment Manufacturers (CECED), said that the EU’s Waste and Electrical and Electronic Equipment (WEEE) directive had helped to create a market involving other commercial actors who were not bound by EPR responsibilities.

“The playing field has changed,” she said. “It hasn’t been easy to adapt to this changing market and the effectiveness of some EPR schemes has not been as good as it could be. A lot of waste is escaping and it is not known where it is going, so we strongly advocate the registering and reporting of all waste flows, not just those going to official EPR schemes.”

Future schemes should be flexible enough to accommodate fluctuating commodity prices across the EU, she said.

Batteries directive

The EU’s Batteries Directive sets out a target of a 45% collection rate by 26 September 2016. But Hans Craen, the secretary-general of the European Portable Battery Association, said that efforts to account for 100% of the batteries market were hampered by the fact that not all electric and electronic products were coming back into the waste stream, due to loopholes and ‘grey zones’

“The repercussion is that the closer you get to the targets in battery directive, the more difficult it gets,” he said. “The EU has to give clear guidance on where the boundaries are for interpretation as it has an effect on the functioning of takeback systems.”

Waste business ‘very vulnerable to corruption’

The waste management business is “very vulnerable” to corruption. More transparency will be needed throughout the chain if the European Union is serious about reaching its resource efficiency goals, according to experts.

Waste systems are operated by a myriad of different companies and organisations. But who does what, why and when, and for how much is a question on the lips of many involved in the business, whether public authorities or private companies.

With the European Commission set to review EU waste legislation in May, policymakers are working on how to improve the transparency of the economic system governing waste management.

The conviction is that more transparency will lead to a better functioning “circular economy”, in which waste management businesses and municipalities get more out of the materials that enter the economy, lowering the cost for consumers and on the environment. The EU has set a goal of ending landfilling by 2020 and recycling at least 50% of all household waste by 2020, but the Commission also plans to release further targets.

“We found that we lack knowledge and that there is a huge challenge in terms of transparency”, said Olivier de Clercq, a member of the European Commission’s environment directorate, who was speaking at a EurActiv conference in Brussels last week (18 March).

“When we go member state by member state, we have huge differences in terms of access to data,” said de Clercq, referring to Extended Producer Responsibility (EPR)

schemes that have been implemented across Europe. EPR is a system of waste management in which companies are responsible for the products they put on the market throughout their entire life cycle.

Sector ‘prone to corruption’

Currently, in many member states, companies that release products into the market pay into a Producer Responsibility Organisation (PRO), which takes on the responsibility for the product on their behalf. The PRO pays the municipality to collect the waste from consumers, as that is deemed a public service.

In a well-functioning EPR system, the municipality’s waste management costs are recovered almost entirely through the sale of the discarded materials, reducing the cost on taxpayers.

“In the countries where it is not functioning properly, the citizens are paying an additional fee to the municipality or the collection system is not working efficiently, which means recycling targets are not being met,” said Vanya Veras, the secretary general of Municipal Waste Europe.

The complexity of public procurement contracts and the streams of funding between companies, PROs, public officials and citizens mean that there are many avenues through which the money can disappear. In some countries, PROs receive payment from industry for the treatment of their waste but citizens are still being required to pay almost the full recovery costs, one source said.

That is one of a number of abuses to which officials have been alerted. The recent EU report on corruption says that waste management is one of sectors “most prone to corruption”.

Referring to unspecified public procurement contracts, but which include those in the waste sector, the report says: “In a few Member States, control mechanisms have revealed cases in which officials used local government assets to conclude transactions with companies related to them ... Most of the cases have concerned charges or

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allegations of illegal party funding, personal illicit enrichment, diversion of national or EU funds, favouritism and conflicts of interest.”

The report goes on to say: “In a few Member States, there were cases in which some organised crime leaders at municipality level establish their own political parties or infiltrated municipal councils to exert influence over local law enforcement or judiciary, and to rig public tenders.”

Taking eight EU member states as case studies, a report by the EU’s anti-fraud office, OLAF, estimates the direct costs of corruption in public procurement in eight main sectors, including water and waste, at €1.4 to 2.2 billion in 2010. The other sectors included were road and rail, urban or utility construction, training, and research and development.

While in most regions, the level of corruption is a far-cry from Gomorrah, the Italian film released in 2008, which exposed the Napoli mafia’s relationship with waste management, the lack of transparency does mean the waste business is ripe for abuse.

“It is also clear that without increased transparency, the waste business is very vulnerable to corruption,” said Jori Ringman-Beck, the director of recycling, products and the environment at Ceperi, the European paper recyclers’ association. Beck’s statement was corroborated by other sources, who added that corruption in the waste management sector was present across the majority of the European Union.

Officials can also rig their waste management statistics by including material imported for recycling into their statistics. Gaston Franco, a French MEP from the centre-right European People’s Party, said in a written question to the Commission: “Eurostat recommends that waste imported for recycling should not be counted. However, some Member States improve their performance by doing so. This has the effect of overstating their recycling performance and masking the requirement to eliminate the non-recyclable residual tonnage.”

While German municipalities are often cited as examples of best practice, the country

benefits, in particular, from favourable statistics, according to the FNADE, a French federation of industries involved in environmental treatment activities.

“You have the case of Germany where it’s not clear cut,” one source said, adding that some municipalities were achieving higher results than their recycling targets despite PROs not paying for the entire treatment cost, “even though they are receiving money from industry”.

“PROs are not paying, even though they are receiving money from industry, in the majority of municipalities, for a variety of justifications that they give,” the source said. “I’m pretty sure that the German industry paying into the PROs is not aware that they are not paying for collection.” The remaining costs must fall on the taxpayer, the source added.

Lost funding

The lack of effective waste management means that many regions end up landfilling or burning often quite toxic waste, leading to severe water- and airborne pollution. Citizens and companies also end up paying huge amounts for a system which does not work.

The average fees paid by producers to the organisations that treat waste from their products ranges from €14 to €200 per tonne for the same mix of packaging streams across the EU. Commission officials blame “inefficiency” in the waste management system.

“One of the conclusions is that the most costly systems are not necessarily the most effective and the contrary. You can have an efficient system with a low cost,” the Commission’s de Clercq said.

“So in terms of economic instruments [for waste management], we clearly want more guidance for the member states. We would like to increase the cost-effectiveness but also the enforcement, the transparency, the monitoring to ensure that the market is functioning well,” de Clercq added.

The Commission’s environment directorate estimates that the EU could create some 400,000 jobs by 2020 if waste

management rules were properly enforced. Estimates also put the amount of money that could be saved from efficient re-use and recycling strategies in the tens of billions of euros.

Karl Falkenberg, the director general of the environment directorate, also puts the focus on fair competition amongst those in the waste management chain.

His speaking notes from the Brussels conference read: “Concerning this last point, notwithstanding the way competition takes place, a clear and stable framework is necessary in order to ensure fair competition, with sufficient control and equal rules for all, supported by enforcement measures (including sanctions) and transparency.”

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