



ADVOCACY WORKING GROUP
MARKET STUDIES PROJECT

MARKET STUDIES INFORMATION STORE

SECTOR:

WASTE AND WASTE MANAGEMENT

UPDATED: DECEMBER 2015

Information Store

Waste and Waste Management

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| Jurisdiction: | Italy | | | | | | | | | | | |
| Market: | Urban solid waste management | Range of Possible Outcomes | | | | | | | | | | |
| End Date: | Ongoing | Competition Enforcement | Consumer Enforcement | Consumer Education | Business Education | Voluntary Business Compliance | Voluntary Business Action | Recommendations to Government for Changes in the Law | Recommendations to Government to Change Market Structure | Recommendations for Changes to Government Policy | Referral to Third Parties | No Problems Found |
| Duration: | 14 months (as of November 2015) | | | | | | | | | | | |
| Source of idea for study: | Critical issues and regulatory fragmentation in the market of urban solid waste management. | | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | To analyse the market of urban solid waste management and to identify the best management model in order to safeguard the public interest and the environment. | | | | | | | | | | | |
| Link to report: | http://www.agcm.it/en/newsroom/press-releases/2189-hearing-of-president-pitruzzella-in-the-environment-commission-of-the-senateqmore-competition-in-the-management-of-municipal-wasteq.html | | | | | | | | | | | |

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| Jurisdiction: | Poland | | | | | | | | | | | |
| Market: | Waste management | Range of Possible Outcomes | | | | | | | | | | |
| End Date: | Ongoing | Competition Enforcement | Consumer Enforcement | Consumer Education | Business Education | Voluntary Business Compliance | Voluntary Business Action | Recommendations to Government for Changes in the Law | Recommendations to Government to Change Market Structure | Recommendations for Changes to Government Policy | Referral to Third Parties | No Problems Found |
| Duration: | | | | | | | | | | | | |
| Source of idea for study: | In-house work | | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | Detailed analysis of the market structure and its players for the Department of Consumer Policy, UOKiK. | | | | | | | | | | | |
| Link to report: | | | | | | | | | | | | |

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| Jurisdiction: | Lithuania | Range of Possible Outcomes | | | | | | | | | | |
| Market: | Household waste market | | | | | | | | | | | |
| End Date: | April 2015 | Competition Enforcement | Consumer Enforcement | Consumer Education | Business Education | Voluntary Business Compliance | Voluntary Business Action | Recommendations to Government for Changes in the Law | Recommendations to Government to Change Market Structure | Recommendations for Changes to Government Policy | Referral to Third Parties | No Problems Found |
| Duration: | 14 months | | | | | | | | | | | |
| Source of idea for study: | High number of competition infringements (6 in 2014) and ongoing investigations (5 in 2014) in this sector | | | | | | | | | | | |
| Outcome (tick relevant columns): | | | | | | | | | | | | |
| Reason for study (what were the problems)? | The sectorial inquiry was started last February in response to a high number of investigations into municipal decisions concerning waste management. The aim of the inquiry was to analyse the sector and to suggest improvements to the waste management system in Lithuania. | | | | | | | | | | | |
| Link to report: | http://kt.gov.lt/teise/nut/2015-04-30_1S-47.pdf (In Lithuanian) http://www.kt.gov.lt/en/index.php?show=news_view&pr_id=1620 (press-release in English) | | | | | | | | | | | |

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| Jurisdiction: | Poland | Range of Possible Outcomes | | | | | | | | | | |
| Market: | Waste disposal | | | | | | | | | | | |
| End Date: | October 2014 | Competition Enforcement | Consumer Enforcement | Consumer Education | Business Education | Voluntary Business Compliance | Voluntary Business Action | Recommendations to Government for Changes in the Law | Recommendations to Government to Change Market Structure | Recommendations for Changes to Government Policy | Referral to Third Parties | No Problems Found |
| Duration: | 4 months | | | | | | | | | | | |
| Source of idea for study: | In-house work | | | | | | | | | | | |
| Outcome (tick relevant columns): | | | | | | | | | | | | |
| Reason for study (what were the problems)? | Market research conducted as part of antitrust proceedings. | | | | | | | | | | | |
| Link to report: | | | | | | | | | | | | |

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| Jurisdiction: | Estonia | Range of Possible Outcomes | | | | | | | | | | |
| Market: | Waste Management | | | | | | | | | | | |
| End Date: | December 2012 | Competition Enforcement | Consumer Enforcement | Consumer Education | Business Education | Voluntary Business Compliance | Voluntary Business Action | Recommendations to Government for Changes in the Law | Recommendations to Government to Change Market Structure | Recommendations for Changes to Government Policy | Referral to Third Parties | No Problems Found |
| Duration: | 2 months | | | | | | | | | | | |
| Source of idea for study: | Public resources plus previous practice of ECA | | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | <i>The current Waste Act is unduly restrictive of free enterprise and the related waste management markets should be completely open to free competition.</i> | | | | | | | | | | | |
| Link to report: | Not available | | | | | | | | | | | |

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| Jurisdiction: | Germany | Range of Possible Outcomes | | | | | | | | | | |
| Market: | Dual Systems | | | | | | | | | | | |
| End Date: | December 2012 | Competition Enforcement | Consumer Enforcement | Consumer Education | Business Education | Voluntary Business Compliance | Voluntary Business Action | Recommendations to Government for Changes in the Law | Recommendations to Government to Change Market Structure | Recommendations for Changes to Government Policy | Referral to Third Parties | No Problems Found |
| Duration: | | | | | | | | | | | | |
| Source of idea for study: | Liberalisation on the market for the recovery and recycling of sales packaging | | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | Investigate the effect of the introduction of competition in the market | | | | | | | | | | | |
| Link to report: | http://www.bundeskartellamt.de/SharedDocs/Publikation/DE/Sektoruntersuchungen/Sektoruntersuchung%20Duale%20Systeme%20-%20Abschlussbericht.pdf?__blob=publicationFile&v=7 (German only) | | | | | | | | | | | |

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| Jurisdiction: | Poland | Range of Possible Outcomes | | | | | | | | | |
| Market: | Communal waste market | | | | | | | | | | |
| End Date: | March 2012 | Competition Enforcement Consumer Enforcement Consumer Education Business Education Voluntary Business Compliance Voluntary Business Action Recommendations to Government for Changes in the Law Recommendations to Government to Change Market Structure Recommendations for Changes to Government Policy Referral to Third Parties No Problems Found | | | | | | | | | |
| Duration: | 21 months | | | | | | | | | | |
| Source of idea for study: | | | | | | | | | | | |
| Outcome (tick relevant columns): | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | <p>On 1 January 2012, an amendment prepared by the Ministry of Environment entered into force changing the Act on maintaining cleanliness and order in communes. It completely changed the system of waste management in Poland. Before the amendment, property owners could decide which undertaking was to collect their waste. Under current rules, this choice can only be made by the commune/municipality by way of a tender procedure. The selected company provides its services throughout the territory of a given commune/municipality, and in the case of larger municipalities - within a certain area. Local authorities needed to introduce new solutions until mid-2013. While the works on the new regulations were in progress, the Office of Competition and Consumer Protection decided to examine the situation on this market</p> | | | | | | | | | | |
| Link to report: | https://uokik.gov.pl/download.php?plik=11547 | | | | | | | | | | |

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| Jurisdiction: | Poland | Range of Possible Outcomes | | | | | | | | | |
| Market: | Parish cemeteries administration | | | | | | | | | | |
| End Date: | January 2012 | Competition Enforcement Consumer Enforcement Consumer Education Business Education Voluntary Business Compliance Voluntary Business Action Recommendations to Government for Changes in the Law Recommendations to Government to Change Market Structure Recommendations for Changes to Government Policy Referral to Third Parties No Problems Found | | | | | | | | | |
| Duration: | 2 months | | | | | | | | | | |
| Source of idea for study: | In-house work | | | | | | | | | | |
| Outcome (tick relevant columns): | | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | <p>Study of parish cemeteries administration launched in relation to anti-trust proceedings concerning the issue of participants' conduct on such markets.</p> | | | | | | | | | | |
| Link to report: | | | | | | | | | | | |

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| Jurisdiction: | Poland | Range of Possible Outcomes | | | | | | | | | |
| Market: | Waste management and disposal | | | | | | | | | | |
| End Date: | December 2011 | Competition Enforcement Consumer Enforcement Consumer Education Business Education Voluntary Business Compliance Voluntary Business Action Recommendations to Government for Changes in the Law Recommendations to Government to Change Market Structure Recommendations for Changes to Government Policy Referral to Third Parties No Problems Found | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Duration: | 18 months | | | | | | | | | | |
| Source of idea for study: | In-house work | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Reason for study (what were the problems)? | Study of waste management and disposal market. Issues: market structure and concentration. The analysis was a part of a nationwide study related to forthcoming changes in the waste management system in Poland under new legislation. | | | | | | | | | | |
| Link to report: | | | | | | | | | | | |

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| Jurisdiction: | Estonia | Range of Possible Outcomes | | | | | | | | | |
| Market: | Waste management | | | | | | | | | | |
| End Date: | March 2010 | Competition Enforcement Consumer Enforcement Consumer Education Business Education Voluntary Business Compliance Voluntary Business Action Recommendations to Government for Changes in the Law Recommendations to Government to Change Market Structure Recommendations for Changes to Government Policy Referral to Third Parties No Problems Found | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Duration: | 4 months | | | | | | | | | | |
| Source of idea for study: | Information from Tallinn City Government | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | <i>The drafted plan of the Tallinn City Government to direct all waste generated on the administrative territory of Tallinn to a waste incineration plant established by a single operator. The relevant resolution of the City Government may affect the competition situation for district heating as well as the electricity market.</i> | | | | | | | | | | |
| Link to report: | http://www.konkurentsiamet.ee/public/AnnualReports/_ANNUAL_REPORT_2010_ECA.pdf page 26 | | | | | | | | | | |

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| Jurisdiction: | Italy | Range of Possible Outcomes | | | | | | | | | | |
| Market: | Recyclable Packaging Waste | | | | | | | | | | | |
| End Date: | June 2008 | Competition Enforcement <input type="checkbox"/> | Consumer Enforcement <input type="checkbox"/> | Consumer Education <input type="checkbox"/> | Business Education <input type="checkbox"/> | Voluntary Business Compliance <input type="checkbox"/> | Voluntary Business Action <input type="checkbox"/> | Recommendations to Government for Changes in the Law <input checked="" type="checkbox"/> | Recommendations to Government to Change Market Structure <input type="checkbox"/> | Recommendations for Changes to Government Policy <input type="checkbox"/> | Referral to Third Parties <input type="checkbox"/> | No Problems Found <input type="checkbox"/> |
| Duration: | 39 months | | | | | | | | | | | |
| Source of idea for study: | | | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | <p>The imminent expiry of the Convention that governs relations between ANCI, the Associazione Nazionale Comuni Italiani (National Association of Italian Municipalities) and CONAI, the Consorzio Nazionale Imballaggi (National Packaging Consortium), and the Authority's awareness that waste packaging materials are an economic resource that Italian municipalities are unable to exploit and that could instead, with proper involvement of the market, guarantee public benefits through a better collection service and lower charges.</p> <p>To ascertain if the operation of a system of consortia (with significant areas "reserved") reduces the degree of competition in the industry.</p> | | | | | | | | | | | |
| Link to report: | http://www.agcm.it/en/newsroom/press-releases/1706-fact-finding-investigation-of-packaging-waste-concluded.html | | | | | | | | | | | |

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| Jurisdiction: | Estonia | Range of Possible Outcomes | | | | | | | | | |
| Market: | Waste and Package Sector | | | | | | | | | | |
| End Date: | End of 2007 | Competition Enforcement Consumer Enforcement Consumer Education Business Education Voluntary Business Compliance Voluntary Business Action Recommendations to Government for Changes in the Law Recommendations to Government to Change Market Structure Recommendations for Changes to Government Policy Referral to Third Parties No Problems Found | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Duration: | 2005-2007 | | | | | | | | | | |
| Source of idea for study: | In 2005 the new Waste Act and Package Act entered into force resulting in significant changes in the markets for waste management, collection and recovery of packages. | | | | | | | | | | |
| Outcome (tick relevant columns): | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Reason for study (what were the problems)? | Main problems on the market were the establishment and operating principles of producer liability organizations, the use of green dot label and exclusive rights provided by local governments. | | | | | | | | | | |
| Link to report: | | | | | | | | | | | |