



ADVOCACY WORKING GROUP
MARKET STUDIES PROJECT

MARKET STUDIES INFORMATION STORE

SECTOR

WASTE MANAGEMENT

UPDATED: MARCH 2020

Information Store

Jurisdiction:	Sweden											
Sector:	Waste and Waste Management											
Market:	Circular Economy	Range of Possible Outcomes										
End Date:	Feb 12, 2018											
Duration:	9 months											
Source of idea for study:	Government commissioned inquiry											
Outcome: (check all relevant boxes)		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 checked="" type="checkbox"/>	<input checked="" 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 underlying problems?):	Effects of competition and digitalization on sustainable development											
Link to report:	http://www.konkurrensverket.se/globalassets/publikationer/rapporter/rapport_2018-1.pdf see also http://www.konkurrensverket.se/globalassets/publikationer/nordiska/nordic-report-2016_waste-management-sector.pdf											
Remarks (if any):												

Information Store

Jurisdiction:	Sweden												
Sector:	Waste and Waste Management												
Market:	Circular economy	Range of Possible Outcomes											
End Date:	2016	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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Duration:	1 year +												
Source of idea for study:	Common initiative by Nordic national competition authorities												
Outcome (tick relevant columns):													
Reason for study (what were the problems)?	General concerns and monitoring of markets. Similar Nordic markets & problems.												
Link to report:	http://www.konkurrensverket.se/globalassets/publikationer/nordiska/nordic-report-2016-waste-management-sector.pdf												

Information Store

Waste and Waste Management

Jurisdiction:	Italy	Range of Possible Outcomes										
Market:	Urban solid waste management											
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	<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"/>
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											

Jurisdiction:	Poland	Range of Possible Outcomes										
Market:	Waste management											
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	<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"/>
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:												

Information Store

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	<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"/>
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)											

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	<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"/>
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:												

Information Store

Jurisdiction:	Estonia											
Market:	Waste Management	Range of Possible Outcomes										
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											

Jurisdiction:	Germany											
Market:	Dual Systems	Range of Possible Outcomes										
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)											

Information Store

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										

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:											

Information Store

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:											

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										

Information Store

Jurisdiction:	Italy											
Market:	Recyclable Packaging Waste	Range of Possible Outcomes										
End Date:	June 2008	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:	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											

Information Store

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
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"/>	<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:												