



Waste services in a green economy

Skills and skill needs in a
changing waste industry

Brussels, 14 June 2012

Introduction



□ What changes?

1. Political level
2. Company level
3. Jobs

□ What response?

1. Workers participation
2. Just transition
3. EPSU priorities

Resource efficiency roadmap

- ❑ By 2020, waste is managed as a resource. Waste generated per capita is in absolute decline.
- ❑ Recycling and re-use of waste are economically attractive options for public and private actors due to widespread separate collection and the development of functional markets for secondary raw materials.

Resource efficiency roadmap

- ❑ Waste legislation is fully implemented. Illegal shipments of waste have been eradicated.
- ❑ Energy recovery is limited to non recyclable materials, landfilling is virtually eliminated and high quality recycling is ensured.

Resource efficiency roadmap

The Commission will:

- ▣ Stimulate the secondary materials market and demand for recycled materials (in 2013/2014);
- ▣ Review existing prevention, re-use, recycling, recovery and landfill diversion targets (2014)

Resource efficiency roadmap

- ❑ Ensure that public funding from the EU budget gives priority to activities higher up the waste hierarchy as defined in the Waste Framework Directive (e.g. priority to recycling plants over waste disposal) (in 2012/2013)

Market structure and trends



- ❑ Major trend towards outsourcing
- ❑ Rapidly growing sector
- ❑ Convergence with water sector

Market structure and trends

- Concentration: 3 largest companies 50% more turnover than the following 13 smaller companies
- One third are private owned companies, two-thirds is public, but increasing role for the private sector

Waste companies by size

Company	Parent	Parent country	sales 2008 (€m.)
Veolia Environnement	Veolia	France	7,668
SUEZ Environnement	GDF-SUEZ	France	5,770
Remondis	Rethmann	Germany	5,600
FCC	FCC	Spain	2,788
Alba	Alba	Germany	2,700
Urbaser	ACS	Spain	1,480
AVR/Van Gansewinkel	KKR/CVC	USA/UK	1,197
Biffa	Montagu PE	UK	788
Shanks		UK	697
Séch�-SAUR		France	695
Cespa	Ferrovial	Spain	606
Ragn-Sells		Sweden	408
Delta		Netherlands	405
Energie AG		Austria	300
Lassila & Tikanoja		Finland	300
CNIM		France	271

Employment

- Substantial increase in employment along with growing turnover
- Forecast:
 - 50,000 new jobs in waste management
 - 500,000 new jobs in recycling

Skills and jobs / Jobs and skills

- ▣ What kind of new jobs?
- ▣ Level, pay, working conditions, “valuation”?
- ▣ Skills for green jobs?

New jobs through greening?

- New functions: sorting, consulting, high-tech and engineering
- Sorting: a problem zone of fast-paced, low-wage, risky conveyor belt work
- Some secondary labour market in recycling (IT)
- Skill upgrading (environmental consulting) limited (IT, DK)

Quality of work

- Workload intensification (also in public sector)
- Uneven and difficult representation and social partnership
- Limited time of contracts → losses of tenure with new contract
- Unequal working conditions for new entrants = fragmentation of workforce

Workers participation?

COMPANY	Country	State of Affairs
Veolia	France	EWC
GdfSuez - SITA	France	EWC
Remondis Rethmann	Germany	no
Alba	Germany	no
FCC Aqualia _ASA	Spain	discussion
ACS	Spain	discussion
Ferrovial	Spain	no
Seche (SAUR)	France	exploration
Ragn-Sells	Sweden	discussion
RenoNorden	Norway	Exploration, does not qualify yet
Van Ganzewinkel	Netherlands	Discussion lead by works council
Lassila & Tikanoja	Finland	exploration

Just transition and Decent work

- What should it mean?
- Active training and education strategies ensuring workers are able to prepare themselves for the transition to greater resource efficiency
- Dialogue between government(s) and social partners

Just transition and Decent work

- Creation and maintenance of decent green jobs through investment in low-carbon technologies, R&D, and innovation including a strong public policy framework
- Respect of human and trade union rights
- Strong and effective social protection systems

EPSU priorities / challenges



- Social Dialogue
- Skills development (in participation with workers!!!)
- Environmental services
- Health and Safety

Working for a green and clean planet!

▣ Thank you very much for your attention!

- ▣ Jerry van den Berge
- ▣ EPSU
- ▣ jvandenberge@epsu.org

