



Challenges for Organising and Collective Bargaining in Care, Administration and Waste collection sectors in Central and Eastern European Countries

Slovakia: Waste Management sector

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1. Methodological preface

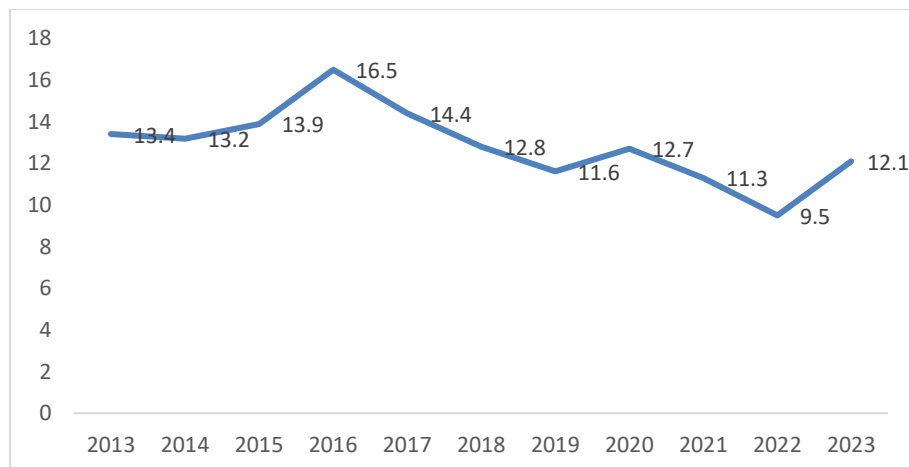
The report draws on extensive desk research in the waste management sector and relevant literature on social dialogue. Additionally, we enriched the study with insights from an interview with a representative from a leading waste management company in Slovakia, recognised for its successful collective bargaining practices within the sector.

2. General characteristics of the waste sector

While small within the overall economy, Slovakia's waste management sector is vital for environmental sustainability and public health. The industry comprises public and private organisations involved in waste collection, sorting, recycling, and disposal. It features stable public sector jobs and a significant presence of multinational corporations (EPSU, 2012).

The number of individuals employed in waste management decreased from 13,400 in 2013 to 9,500 in 2022, highlighting a significant decline in employment within this sector.

Figure 1: The evolvement of employment in waste management in Slovakia (in thousand persons, 2013-2023)



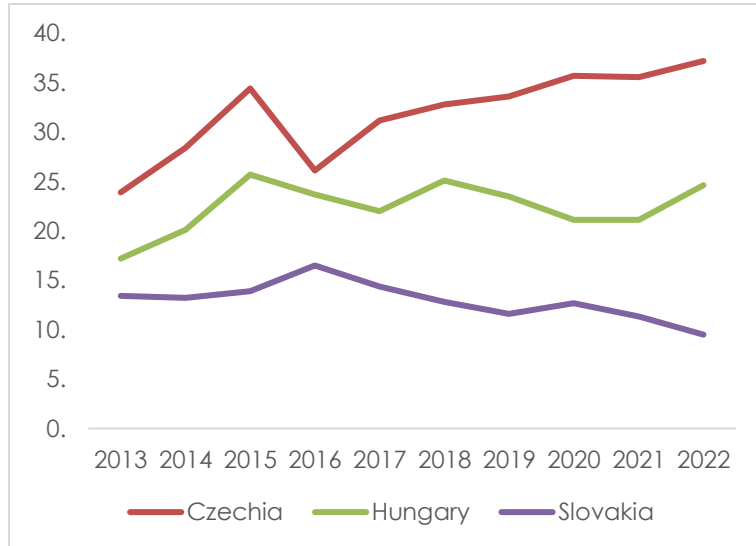
Source: Eurostat, NACE: E38 Employment by sex, age and detailed economic activity (from 2008 onwards, NACE Rev. 2 two digit level) - 1 000 [lfsa_egan22d_custom_10917481]¹

The observed decrease is particularly noticeable when compared to the other partner countries, Czechia and Hungary. The data shows a significant **29% decrease in percentage change from 2013 to 2022**. The reduction decreased

¹ No data in E39 is available for Slovakia.

to 9% in 2023; however, the prevailing political developments do not ensure a consistent rise in the waste management sector.

Figure 2: Comparison of the employment in the waste management in Slovakia, Czechia, and Hungary (in thousand persons, 2013-2022)



Source: Eurostat, NACE: E38 Employment by sex, age and detailed economic activity (from 2008 onwards, NACE Rev. 2 two digit level) - 1 000 [lfsa_egan22d_custom_10917481]

Large public companies like OLO in Bratislava coexist with smaller private enterprises, often focusing on specific regions or municipalities. These entities provide various services, including managing hazardous waste (EPSU, 2012; European Environment Agency, 2021). Aside from that, large multinational corporations are operating in the country, such as VEOLIA, which focuses more on energy and building management than waste management. But also A/S MARIUS PEDERSEN, a Danish company and one of the largest firms in Slovakia providing services in the field of waste management, focuses on customers from the municipal and business spheres, industrial enterprises, and retail chains..²

In Slovakia's waste management sector, the workforce is mainly middle-aged and male, especially in demanding physical jobs. Women tend to occupy more administrative roles. Many workers possess secondary education, often with a technical focus, while some have vocational training related to waste management. Administrative, managerial, and regulatory positions usually require higher educational qualifications (EPSU, 2012; European Environment Agency, 2021).

² <https://www.mariuspedersen.sk/o-nas/profil-spolocnosti/>

Working conditions in the waste management sector can be physically demanding, with work often performed in challenging environments such as outdoor settings or processing plants. Standard working hours apply, but shifts and overtime are common, especially in continuously operating facilities. Workers must use protective equipment, and health and safety regulations are strictly enforced. Wages vary, with higher pay associated with more hazardous or technical roles (EPSU, 2012; European Environment Agency, 2021).

Collective bargaining, involving trade unions like OZ KOVO and IOZ, is significant in securing wage increases, benefits such as meal vouchers, additional paid leave, and worker protections. The sector generally offers stable employment, particularly in larger companies or public entities (EPSU, 2012; European Environment Agency, 2021).

The Ministry of Environment oversees waste management policies, while the Ministry of Labour, Social Affairs, and Family regulates industrial relations and enforces labour laws in the sector. These regulatory bodies play a crucial role in ensuring adherence to labour laws and environmental regulations, thus promoting sustainable and legally compliant practices within the industry.

The industry is subject to national legislation, notably the Waste Act (Zákon o odpadoch, 79/2015 Coll.), which delineates waste management, recycling, and disposal regulations. Additionally, environmental and labour statutes are relevant. Enterprises are obliged to adhere to stringent environmental regulations, including directives from the European Union regarding waste management.

Slovakia adheres to EU waste management regulations, encouraging recycling and minimising landfill usage. The nation implements specific policies that align with the EU's Waste Framework Directive, highlighting waste prevention, recycling, and sustainable resource management. This sector is shaped by national legislation and EU rules establishing operational guidelines and worker safety standards.

Waste management in Slovakia continues to lag behind most EU countries. The municipal waste recycling rate approached the EU average in 2021, but with landfilling at 41%, we are significantly below the EU average of 23%. Slovakia is thus at risk of not meeting the goals of increasing recycling to 65% and reducing landfilling to a maximum of 10% of municipal waste by 2035 (IEP, 2023).

Below are presented some details about the Waste Prevention Programme (WPP) of the Slovak Republic from 2019 to 2025, along with its respective indicators (EEA, 2023):

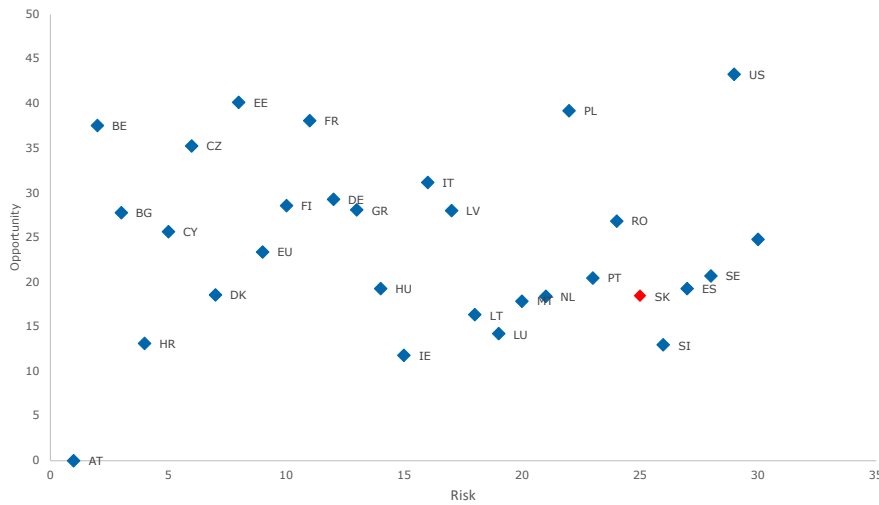
- Municipal waste generation per capita increased almost steadily from 261 kg per capita in 2004 to 433 kg per capita in 2020.
- Although the first WPP was implemented in 2014, no positive effects can be observed in reducing MSW, which can be influenced by many factors (population and household expenditure).
- Between 2013 and 2021, municipal waste generation per capita increased by 64 % (from 304 kg to 496 kg). However, Slovakia’s waste generation remained below the 2020 European average (517 kg1 per capita/year).
- In general, Slovakia’s waste generation (excluding major mineral waste) shows a decreasing trend, particularly between 2012 and 2014. Between 2014 and 2018, however, a significant increase took place before dropping again to around 2016 levels in 2020.
- Meanwhile, GDP has increased steadily from 2010 to 2018 before dipping again in 2020. This indicates that Slovakia’s economic growth is not yet decoupled from its waste generation.
- An impact on the population cannot be observed, as its growth rate remained quite steady throughout this period ((EEA, 2023).

3. Major problems and challenges in the sector

The available literature and documents emphasise the structural challenges within the waste industry concerning EU environmental protection goals rather than focusing on working conditions.

A significant structural challenge in this sector is the perception among companies in Slovakia that transitioning to an emission-free economy is primarily a risk rather than a potential opportunity. Approximately 60% of Slovak companies foresee adverse physical effects resulting from these changes on their operations. In contrast, only 43% of firms actively invest in enhancing their resilience against such risks (NBS, 2024).

Figure 3: Perception of the impacts of the transition to stricter climate standards in progress the next five years as an opportunity vs. risk (%)



Source: EIB Investment Survey 2023 in NBS (2024)

The Institute of Environmental policies identified the following challenges about municipal waste management in Slovakia (IEP, 2023):

- Waste management in Slovakia continues to lag behind most EU countries.
- The lack of a long-term strategy in the field of waste management and the lack of data led to a confusing situation.
- The planned measures will increase the costs of waste management by 16 million. euros per year. However, they will not be enough to meet the municipal waste recycling goals. The landfill target should be met.
- Taking additional measures will increase recycling to the level of 62%, which will require an additional 10 million. euro
- The planned intentions of building facilities for the energy use of waste exceed the needs of Slovakia.
- The overcapacity of energy use for waste creates the country's dependence on waste production and imports and inhibits the growth of recycling.
- A clear waste management strategy is necessary in Slovakia to achieve stability and predictability.
- Improving waste management will require significant improvements in the availability and quality of data (EIP, 2023)

According to the ZOP (Association of the Waste Industry)³ and its Declaration (ZOP, 2022), the key problems of the industry are:

³ <https://www.zopsr.sk/the-association-of-the-waste-industry/>

- **Legislative Challenges and Preparedness:** Slovakia may not be ready by 2023 to implement the required waste management regulations due to rapid legislative changes, lack of broader discussion, ongoing pandemic, lengthy approval processes, and inflation, which all hinder the ability to utilise EU funds effectively.
- **Underdeveloped Infrastructure:** The country lacks sufficient capacities for energy recovery from waste, which poses a significant threat to the stability of the waste management sector. The absence of adequate facilities for processing hazardous waste is particularly critical, with the situation expected to worsen over the next 5-10 years.
- **Biodegradable Waste Management:** Issues related to the collection and processing of kitchen biodegradable waste (KBO), primarily due to insufficient processing capacities like biogas plants. Additionally, the quick implementation of new legislation without detailed capacity mapping has raised environmental concerns.
- **Environmental and Health Concerns:** The treatment and disposal of waste, including handling hazardous waste and KBO, face challenges in maintaining environmental and public health standards. For instance, improper processing of biodegradable waste could lead to contamination of agricultural soils with microplastics and pathogens, potentially degrading soil quality (ZOP, 2022),

Challenges regarding the working conditions can be drawn from the general conditions in the Slovak industry and findings of the international studies on the working conditions in the waste industry (ILO, 2012)⁴:

In the waste management sector, the **political focus is on job creation and skills rather than on job quality**. But greening can also be a focus of attention.

Greening is not a single process impacting the quality of work. To understand social realities, there is a **need to analyse privatisation, which leads to fragmentation of the workforce and work intensification, the role of public procurement** (most advantageous offer versus cost-cutting), etc.

The waste management industry is currently grappling with **labour shortages and an ageing workforce**. Due to its physically demanding nature, the industry is less appealing to younger generations, leading to a workforce demographic trending toward older employees. This trend could exacerbate labour shortages, especially in roles requiring physical labour, as older workers retire and fewer younger individuals enter the industry.

⁴ These will be verified by the interviews

The industry's move toward digitalisation and automation presents opportunities for enhanced efficiency and safety, but it also requires a proficient workforce to utilise new technologies. The sector may face **challenges in upskilling existing employees**, particularly the older workforce that is less accustomed to digital tools.

However, there is no evidence that preventing waste generation by sorting creates better jobs; there is an **inverse relationship between the number of jobs and the amount of waste**. This is contingent upon technology and how it is implemented and will require a conscious effort by stakeholders.

The waste management sector is inherently high-risk, with workers frequently exposed to hazardous materials and environments. Ongoing **challenges include ensuring adherence to rigorous health and safety standards**, addressing concerns regarding compliance with safety regulations, the adequacy of protective equipment, and managing the frequency of accidents and health issues related to exposure to hazardous substances.

4. Characteristics of social dialogue organisations in the sector

In Slovakia, the leading social partners in the waste management sector include the following:

Trade Unions represent the employees working in the waste management sector. Two trade unions are relevant:

- OZ KOVO - The Metalworkers' Trade Union (Odborový zväz KOVO), which, despite its name, also represents workers in various sectors, including waste management and
- IOZ - The Integrated Trade Union (Integrovaný odborový zväz) also has a presence in the waste management sector.

The Metalworkers' Trade Union (OZ KOVO) is represented in the tripartite social dialogue council through the Confederation of the Trade Unions of Slovakia (KOZ). The Integrated Trade Union is also a member of the tripartite council. However, no collective agreement specifically for waste management has been negotiated at the national level.

Local governments and municipalities are essential partners in negotiating and executing waste management agreements since these services are often contracted at the municipal level.

The stakeholders collaborate to engage in collective bargaining, establish industry benchmarks, and address labour and environmental concerns within the waste management sector.

Union of Waste Industry (ZOP, *Zväz odpadového priemyslu*)⁵ This newly established professional organisation has nine founding members working in waste processing and related consultancy, education, and local governments.

The impetus for establishing ZOP was that Slovakia is currently one of the underdeveloped EU countries in the field of waste processing. Therefore, the main mission of ZOP is to support the modernisation of waste processing in Slovakia through activities in the technical and legislative fields, as well as in international cooperation, education and awareness.

The primary objectives of ZOP are to offer constructive feedback on emerging legislative and strategic documents in the waste management field, establish a professional platform for communication with the Ministry of Environment and other relevant authorities, and reassess current legislation and strategic documents for gradual enhancements.⁶ It's worth noting that these objectives do not encompass industrial relations, working conditions, or employment in the sector.

The Union of Waste Industry operates as a "lobbying" organisation and is not a member of any of the employers' organisations participating in the tripartite or bipartite collective negotiations or the national tripartite council.

4.1. Challenges for organising employees

There is no specific information on challenges related to organising employees in the waste industry. However, based on a comprehensive analysis of the significant challenges of organising non-member workers in Slovakia, the most pertinent findings and obstacles are presented below (Adámek et al., 2023).

Perception of Union Inactivity: Many workers, particularly male employees, perceive trade unions as passive entities that inadequately represent labour interests. This perception deters their union involvement.

Lack of Awareness Among Young Workers: Younger workers, specifically those under 29, exhibit the lowest knowledge concerning labour unions. This lack of awareness substantially hinders recruiting younger individuals into unions.

⁵ <https://www.zopsr.sk/>

⁶ <https://www.zopsr.sk/>

Sector-Specific Criticism: Employees in the manufacturing sector express more pronounced dissatisfaction with trade unions than their counterparts in non-manufacturing sectors. This sector-specific discontent may impede efforts to organise workers in industries where unions are viewed less favourably.

Union Membership Costs: While the issue of financial obligations was referenced, it was not regarded as a significant impediment. This suggests that, although cost may be a consideration, other factors, such as perceptions of union efficacy, represent more crucial barriers (Adámek et al., 2023).

4.2. Good practices for organising employees

After interviewing a trade union representative at a major waste management company, it was found that despite not implementing specific strategies to organise workers, there was a spontaneous increase in trade union membership. This increase occurred during negotiations with the employer about increasing wages due to inflation. Additionally, membership continued to rise once the successful negotiation resulted in higher wages being reflected in the workers' paychecks. This demonstrates that tangible impacts, such as increased wages, significantly motivate workers to join a union.

4.3. Characteristics of employer representation

Employers' associations represent companies and organisations involved in the waste management sector. This includes major waste management entities such as OLO (Odvoz a likvidácia odpadov), which are usually affiliated with one or more municipalities. The municipalities as employers are associated with an umbrella organisation, the Union of Towns and Municipalities of Slovakia (ZMOS). ZMOS is part of the tripartite social dialogue council. ZMOS works with industry professional associations that are dedicated to advocating for the interests of employers within this sector. These associations are crucial in promoting industry standards, addressing sector-specific challenges, and fostering stakeholder collaboration to drive sustainable practices and operational excellence within the waste management industry.

The Association of the Waste Industry (ZOP) is an interest association of legal entities representing entrepreneurs - employers in the waste management sector in Slovakia; it became a new member of the Association of Industrial Unions and Transport (APZD). With the expansion of APZD, it already represents

more than 70% of the domestic manufacturing industry, 13 unions, 1,500 companies and 180,000 employees in industry and transport.⁷

Table 1: Examples of the employers in the waste industry in Slovakia.

Company in Waste Industry	Number of employees
OLO, a. s	500-999
AVE SK odpadové hospodárstvo s.r.o.	100-149
KOSIT, a. s.,	500-999
A.S.A. SLOVENSKO, spol. s r. o = FCC Slovensko, s.r.o	250-499
BRANTNER Slovakia s.r.o	50-99
NEHLEN - EKO, spol. s r.o.	50-99

Source: Statistical Office of the Slovak Republic

Another relevant social actor is the **Association of Entrepreneurs in Waste Management (APOH)**⁸, was established in 1998 and is the first voluntary professional association of subjects engaged in waste management in the Slovak Republic.

APOH brings together business entities providing a wide range of waste management services, including collection, transportation, treatment, energy and material use, recycling, ecological landfilling, and consulting.

APOH focuses on developing activities to promote its members' interests, particularly harmonising waste management legislation in the Slovak Republic with EU laws, ensuring compliance with common European market principles, and protecting economic competition. APOH members' practical experience and professional knowledge make them important partners for state and local government authorities.

APOH members are recognised for upholding environmental standards and business regulations. To join, companies must comply with Slovak Republic laws and tax obligations, adhere to the Association's Code of Ethics, and commit to ethical business practices and sustainable development.

From 1999 to 12/2021, APOH was a European Federation of Waste Management and Environmental Services - FEAD member, based in Brussels. Currently, membership is suspended by the decision of the members of the association.

⁷ <https://www.odpady-portal.sk/Dokument/107432/zvaz-odpadoveho-priemyslu-asociacia-priemyselnych-zvazov-a-dopravy.aspx>

⁸ <http://apoh.sk/kto-sme/>

5. Collective bargaining and other forms of social dialogue in the sector - characteristics

5.1. Content analysis of collective agreements

The COVID-19 pandemic has significantly impacted businesses in Slovakia. Many companies have been forced to stop production, reducing wages and employment. Despite these challenges, there was a successful collective bargaining at OLO, a waste management company in Bratislava. (Fáková, 2020).

Two unions - OZ KOVO OLO and the basic organisation belonging to the Integrated Trade Union (IOZ) worked together to negotiate a new collective agreement effective from April 1, 2020, to March 31, 2023. The collective agreement signed at OLO includes several key points:

- **Wage Increase:** Employees will receive a 50-euro increase in their basic salary starting from April 1, 2020.
- **Meal Voucher Value:** The value of meal vouchers for employees will increase from 4.80 euros to 5.10 euros.
- **Preservation of Benefits:** All benefits from the previous collective agreement are preserved, including wage components such as the 13th and 14th salaries. These salaries are structured to maximize tax and levy relief, increasing employees' net income.
- **Job Security and Wage Protection:** The agreement guarantees that employees who switch to shorter working hours due to changes in work organization will continue to receive the same wage. Additionally, employees with working hours slightly below 37.5 hours (e.g., 36 or 36.5 hours) will see an increase in their salary if their hours are extended.
- **Duration and Future Negotiations:** The agreement is valid from April 1, 2020, to March 31, 2023. Further collective bargaining on wage conditions for the next two years will be addressed through an addendum to the collective agreement.

The agreement was reached after five rounds of negotiations starting in October 2019. The negotiation was challenging, with a real possibility of a dispute, but a consensus was eventually reached in March 2020. This agreement represents a significant achievement for the employees, securing

wage increases and maintaining benefits despite the economic challenges posed by the pandemic (Fáková, 2020).

A new collective bargaining agreement for the upcoming period is currently being processed. According to the trade union representative's interview, the positive change in the negotiations came after a new company directorate was established. The waste management company is closely related to Bratislava city's waste management. The policies at the municipal authority level (Magistrát hlavného mesta Bratislava) support ecological waste management policies, such as the "Bratislava - City Without Waste: Strategy for Handling Municipal Waste in the City of Bratislava with a Goal Transition to a Circular Economy" (Bratislava, 2021). This policy might have a positive impact on the collective bargaining focused primarily on the working conditions of the employee of the main waste management company in the capital of Slovakia.

5.2. Other forms of social dialogue

In Slovakia, waste management is a rapidly growing industry, with several professional associations operating primarily in the industrial and economic aspects rather than on working conditions and social dialogue. Here is a list of associations and non-governmental organisations operating in the waste industry.

- Association of Independent Processors of Secondary Raw Materials
- Association of Authorised Organisations
- ASPEK - Association of Industrial Ecology in Slovakia
- ENVIBAT, z.p.o.
- Food Chamber of Slovakia
- Republican Union of Recycling Industry
- EKOTORYSAZ Association of Municipalities for Waste Disposal

There is a dedicated portal platform for waste management in Slovakia (<https://www.odpady-portal.sk/>), providing information, events, legislation, and activities of the social actors in the industry.

Similarly, the Enviroportal⁹ serves as the official platform for the Ministry of Environment, providing all relevant documents and policies related to environmental protection, including waste management.

The ministry has also established two pertinent agencies responsible for the implementation of projects in the field of environmental protection and for conducting in-depth analyses in this domain:

⁹ <https://www.enviroportal.sk/odpady>

- Slovak Environmental Agency (Slovenská agentúra životného prostredia)¹⁰
- Institute of Environmental Policy (Inštitút Environmentálne politiky)¹¹

5.3. Impact of European sectoral social dialogue

We did not find any relevant information on the affiliation of the national social partners from the waste industry with the EU-level social partners.

From 1999 to 12/2021, APOH, **Association of Entrepreneurs in Waste Management (APOH)**¹², was a European Federation of Waste Management and Environmental Services - FEAD member¹³, based in Brussels.

6. Conclusions and recommendations

While small in the overall economy, Slovakia's waste management sector is critical for environmental sustainability and public health. However, employment in the sector has significantly declined, dropping from 13,400 in 2013 to 9,500 in 2022, a 29% decline. This trend is concerning, especially compared to neighbouring countries like Czechia and Hungary.

The sector's workforce is predominantly middle-aged and male, particularly in physically demanding roles. Women are more common in administrative positions. Most workers have a secondary education, often with a technical specialisation.

Jobs in waste management are physically demanding, often requiring work in challenging environments. Health and safety regulations are strictly enforced, with wages varying based on the hazards and technical requirements of the roles.

The sector faces multiple structural and legislative challenges, including underdeveloped infrastructure, particularly for hazardous waste management, and issues with implementing new waste management regulations.

¹⁰ <https://www.sazp.sk/>

¹¹ <https://iep.sk/>; <https://www.minzp.sk/en/about-us/>

¹² <http://apoh.sk/kto-sme/>

¹³ <https://fead.be/our-members/>

Slovakia is behind in meeting EU waste management goals, particularly in reducing landfilling and increasing recycling rates. The country risks not meeting its targets for 2035.

The sector's shift towards digitalisation and automation could improve efficiency but requires upskilling the workforce, especially older employees who may not be familiar with new technologies.

The waste management sector is inherently high-risk, with ongoing challenges in ensuring safety standards, adequate protective equipment, and managing health risks associated with hazardous materials.

A clear and consistent waste management strategy is critical in Slovakia to ensure stability and meet long-term environmental goals. The lack of such a strategy has led to confusion and inefficiencies within the sector.

Recommendations

To strengthen social dialogue in Slovakia's waste management sector, the following recommendations can be made based on the conclusions from the provided analysis:

Establish regular and transparent communication platforms between workers, employers, and government bodies. This could include formalised meetings, workshops, and online forums where stakeholders can discuss issues, share updates on regulations, and collaborate on solutions.

Empower trade unions like OZ KOVO and IOZ to play a more active role in representing workers' interests, particularly in negotiations regarding wages, working conditions, and health and safety standards. Increased union participation can help address job security concerns and the implementation of new technologies.

Shift the political focus from merely creating jobs to improving the quality of existing jobs within the sector. This can be achieved by ensuring that social dialogue addresses employment numbers and the conditions under which people work, such as health and safety, wages, and work-life balance.

Develop targeted strategies to attract younger workers to the sector and to support an ageing workforce. This could include offering training programs in digital skills, creating career development opportunities, and ensuring that older workers are adequately supported as the sector undergoes digitalisation and automation.

Involve all stakeholders, including employers, employees, and government agencies, in discussing and implementing new regulations. This collaboration will ensure that regulations are realistic and adequate and not burden any group disproportionately.

Engage social partners in the planning and developing waste management infrastructure, particularly in regions with underdeveloped facilities. This would ensure that the infrastructure meets the needs of workers and the environment while adhering to EU regulations.

Strengthen social dialogue around health and safety concerns by involving workers in developing and enforcing safety standards. Developed collaboratively, regular safety audits and training sessions can help reduce the risks associated with hazardous work environments.

Develop a clear and consistent waste management strategy with input from all stakeholders. This strategy should align with long-term environmental goals while also addressing the needs and concerns of workers. Policies should be inclusive, taking into account the voices of those most affected by the changes in the sector.

Foster dialogue on the impacts of digitalisation and automation, ensuring that workers are not left behind as new technologies are introduced. This could involve joint efforts to provide retraining and upskilling opportunities, ensuring the workforce can adapt to and benefit from technological advancements.

By implementing these recommendations, Slovakia's waste management sector can foster a more inclusive, effective, and resilient social dialogue that addresses the current challenges and prepares the sector for future developments.

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