

RESEARCH

**REPORTS**

RECOMMENDATIONS

BARBARA SURDYKOWSKA

# NEGLECTED AND FORGOTTEN WORKERS

## THE WASTE SECTOR IN CENTRAL AND EASTERN EUROPEAN COUNTRIES

INSTITUTE OF  
PUBLIC AFFAIRS

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**NEGLECTED AND  
FORGOTTEN WORKERS**  
THE WASTE SECTOR  
IN CENTRAL AND EASTERN  
EUROPEAN COUNTRIES

INSTITUTE OF PUBLIC AFFAIRS  
Social Policy Programme

This report is one in a series presenting the findings of research carried out in Bulgaria, Czechia, Croatia, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Serbia, Slovakia and Slovenia as part of the project CEE CAW ‘Challenges for Organising and Collective Bargaining in Care, Administration and Waste collection sectors in Central and Eastern European Countries’, which was led by the Institute of Public Affairs (Warsaw). The other partners were the: Bulgarian Academy of Sciences (Sofia), Central European Labour Studies Institute (Bratislava), Lithuanian Centre of Social Sciences (Vilnius), and Centre for Democracy Foundation (Belgrade).



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## Introduction

This comparative report is part of the project CEECAW “Challenges for Organising and Collective Bargaining in Care, Administration and Waste collection sectors in Central Eastern European Countries” carried out by the Institute of Public Affairs in cooperation with research centres and experts from 12 Central and Eastern European countries, and in partnership with the European Federation of Public Service Unions (EPSU)<sup>1</sup>. The report is intended to provide insights into the state of social dialogue in the waste sector and to what extent the implementation of Article 4 of the EU Directive on Adequate Minimum Wages can contribute to the revival of collective bargaining in this sector.

The first observation is that the waste sector is poorly researched in terms of industrial relations, working conditions, and the challenges the workers face. This is all the more surprising given that workers in the sector (broadly defined to include recycling processes) are crucial to the goal of building a circular economy. The main study in this area is *Waste Management in Europe. Good Jobs in the Circular Economy* (EPSU 2017), although a small number of partial studies have also appeared (Sørensen, Kirov, Holtgrewe 2018). It is therefore important to stress that there is no direct literature comparing the working conditions and industrial relations of waste management workers in CEE.

Working conditions in the waste sector can be physically demanding, with work often carried out in challenging environments such as outdoor areas or processing plants. Standard working hours apply, but shifts and overtime are common, especially in continuously operating facilities, with workers having to use protective equipment. There is no in-depth analysis beyond the sketchy picture. Another buzzword that appears in the literature without being developed concerning workers in CEE is that of the increasing automation of the work of waste management employees. On the one hand, this is supposed to make work easier, on the other hand, it requires higher (or more comprehensive) qualifications on the part of the employees. The country reports in this area contain very few concrete references, so it seems that this process is taking place very slowly in CEE. However, this should be

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1 Country reports — <https://www.isp.org.pl/en/projects/ceecaw-challenges-for-organising-and-collective-bargaining-in-care-administration-and-waste-management-sectors-in-central-eastern-european-countries>

investigated much more thoroughly. In any case, the number of references to the issue of lifelong learning for blue-collar workers (and even more so to the involvement of trade unions in this process) is negligible.

The available literature and documents emphasise the structural challenges within the waste industry in relation to EU environmental objectives, rather than focusing on working conditions. **It seems that the following thesis can be put forward: while there are many factors that influence the progressive construction of a circular economy (for example, organisation of the production and consumption process and consumer behaviour), the working and pay conditions of waste management and recycling workers are also crucial factors. Neglect of their working conditions and lack of action to make this work more attractive and prestigious can negatively impact the creation of a circular economy.**

As noted above, the number of studies and, in particular, empirical research on the sector is small. The country reports that have been produced, based on desk research and a limited number of interviews, show what we do not fully know rather than what the precise answers are. In most cases, the country reports were the first attempt to lean into the issue of industrial relations in this sector in CEE.

In any case, there is hope that the report produced by the CEECAW project, which you are holding in your hands, will encourage further, more thorough analysis of the situation of waste management workers in the sector in Central and Eastern Europe.

#### Background information

Effective waste management is a crucial pillar in the European Union's drive toward environmental sustainability and the circular economy. Despite collective efforts, many EU nations have fallen short of critical targets set under the Waste Framework Directive and related policies. The European Union has established comprehensive waste management targets to promote environmental protection, human health, and the transition to a circular economy. These targets are outlined in various directives and regulations, focusing on waste prevention, recycling, and reduction of landfill use.

As already emphasised, the task of this paper is not to analyse EU policies in the area of waste management or the degree of their implementation in individual countries in CEE. The subject of interest is industrial relations in this sector and the challenges faced by the labour force and social partners. As background, however, it is necessary to signal the basic determinants of policy in this sector.

The first important indicator is **Municipal waste recycling targets**, which state that: by 2025 — recycle at least 55% of municipal waste; by 2030 — recycle at least 60% of municipal waste; by 2035 — recycle at least 65% of municipal waste.

The second important indicator is **Packaging waste recycling**. It is necessary that by 2025 the following recycling rates for packaging materials must be achieved: Overall: 65%; Plastic: 50%; Wood: 25%; Ferrous Metals: 70%; Aluminium: 50%; Glass: 70%; Paper and Cardboard: 75%. By 2030 these rates will be increased.

The third important indicator is **Landfill reduction**. By 2035, the amount of municipal waste landfilled must be limited to a maximum of 10% of the total municipal waste generated.

## 1. General description of the sector and workforce situation

The information below is a summary of the information provided in the country reports on the general description of the waste management situation and the main problems and challenges.

### **Bulgaria**

In the late 1990s and early 2000s, many Bulgarian municipalities introduced private operators. There is a belief that some local companies have ties to organised crime and serve to fund political parties or exert pressure on local governments. The move towards privatisation has not been universal, and some municipalities still have kept this activity in-house. Foreign companies have tried to enter the sector, but their presence is still rare. There are no

statistics based on ethnicity, but we could hypothesise that the majority of the sector employees are poorly educated Roma people.<sup>2</sup>

The introduction of technology and machinery is an important element in this sector, but manual physical labour cannot be replaced. However, the workers are low-skilled and the question is how to increase their wages and improve their working conditions. This is particularly challenging in the case of municipal enterprises, where wages depend on municipal budgets. A major challenge is high staff turnover. According to the interviewees, wage levels in the big cities and the capital are not so bad (their salaries are relatively close to the average in Sofia).

## Croatia

Local government oversees most municipal enterprises, while private waste management companies have a minimal presence. Many workers face low wages, limited benefits, and poor job security, contributing to high workplace injury rates. Young workers tend to leave after a short period, leading to an estimated 25–35% shortfall in the needed workforce. Operational areas, especially street cleaning, municipal services, and bulky waste removal, are particularly affected by this shortage.

## Czechia

At the municipal level, both public and private waste management providers operate, with municipalities determining the service model. Outsourcing is common, dominated by three large international firms: Veolia, FCC, and AVE, alongside Czech-owned Pražské služby in Prague. The prevalence of private companies leads to contracting practices that worsen working conditions, resulting in low wages, increased workloads, and precarious employment. Workers handling waste face higher injury rates, averaging 2.5 injuries per 100 workers, significantly above the national average of 1.02. Although

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<sup>2</sup> *National Strategy of the Republic of Bulgaria for Equality, Inclusion and Participation of the Roma (2021 - 2030)*, [https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/combating-discrimination/roma-eu/roma-equality-inclusion-and-participation-eu-country/bulgaria\\_en](https://commission.europa.eu/strategy-and-policy/policies/justice-and-fundamental-rights/combating-discrimination/roma-eu/roma-equality-inclusion-and-participation-eu-country/bulgaria_en) and *Roma access to decent and sustainable employment in Bulgaria, Czech Republic, Hungary, Romania, Slovakia, Spain. With additional benchmarking evidence from Ireland*; ERGO Network, <https://ergonetwork.org/wp-content/uploads/2024/11/ERGO-casestudy-nov2024-web-FINAL.pdf>

digitalisation and automation are expected to reduce health risks, progress is limited. Currently, Brno and Ostrava have implemented two automated sorting lines, while the majority remain manual. A new automated line was expected in Prague in 2023, but supplier issues have delayed its launch. The sector's lack of digitalisation hampers recycling efficiency, with municipal waste landfill rates double the EU average. Aiming to cut landfill use by 2035, revitalising energy recovery is central to this initiative.

## Estonia

The local authority plays a leading role in the development of waste management in its administrative area. The local authority organises the separate collection of waste to prepare it as far as possible for reuse, recycling, or other treatment. However, labour shortages are evident.

## Hungary

The legislative and regulatory framework has become complex due to the government's overhaul of the national waste management system over the past decade, initiated in 2011 with the nationalisation of household waste. In 2015, NHKV Zrt. was established as a state-owned company to coordinate the waste management system. Consequently, foreign-owned companies exited Hungary, replaced by municipal non-profit organisations, while over 750 SMEs continued managing industrial waste. Municipalities now face increased challenges in maintaining public services within tight budgets. Starting from 1 July 2023, they must engage concessionaires or subcontractors for waste management issues and report unresolved matters to the Minister of Construction and Transport.

## Latvia

Waste management in Latvia is managed by municipal corporations and private firms, with one international company being the largest. There is a labour shortage in the waste sector, affecting both manual workers and specialists in treatment plants. However, employee turnover in the surveyed management company is low, with workers either leaving early or remaining long-term, with truck drivers being slightly different and often switching to better-paying seasonal jobs before returning. The trade union criticises what it views as unfair pay practices, where salaries consist of a base amount (60–70%) and an allowance (30–40%), which may not always be paid and is



difficult to challenge. Overtime pay is calculated solely on the base salary, excluding allowances, an issue flagged by trade union members. Additionally, there are concerns about companies operating in a grey area, especially in hazardous and construction waste management. The country also lacks effective vocational training programs for waste management workers.

## Lithuania

Waste management in Lithuania is primarily categorised into two types: municipal and private companies. Municipal waste management firms not only handle waste disposal but also provide a range of other utility services. These companies are regulated by municipalities in terms of service tariffs and by a state price regulator regarding profit margins, ensuring that public interests are safeguarded and services remain affordable and of high quality. In contrast, private waste management companies, which are mostly national in scope, experience less stringent oversight from the government. The unique demographic landscape of Lithuania — characterised by numerous small towns with a shrinking working-age population and a significant concentration of people in larger cities — presents challenges for recruitment in the waste sector. Younger individuals tend to choose higher-paying employment opportunities, while older individuals often shy away from physically demanding roles. Compensation in the waste industry tends to lack competitiveness, with most employees earning only the minimum wage, apart from certain categories such as lorry drivers and higher-skilled positions involved in areas like software, routing, and data processing. Furthermore, waste management jobs in Lithuania are often viewed as lacking in prestige and respect, compounding the difficulties in attracting and retaining workers.

## Poland

Polish municipal waste management regulations require municipalities to self-finance. Despite this, the financial statements of local governments reveal a chronic imbalance in the system. From 2017 to 2021, 77% to 84% of local authorities reported higher expenses than revenue. Most waste is collected by private firms, which handled 61.1% of municipal waste in 2021, similar to 61.2% in 2020. Foreign-owned companies collected 7.2% in 2021, primarily in large cities. Alarming, the pace of change in waste management has significantly slowed, yet with notable improvement prior to 2018.

Financial data shows stark disparities in the financial health of private versus public entities, with the latter demonstrating weaker investment activity.

## Romania

Solid waste management is executed by various entities, including municipalities, public organisations, private operators, or a combination of both in public-private partnerships. Notable municipal companies are Salubrizare Sector 5 SA, RADP Cluj-Napoca, and Administrația Serviciului Public de Salubritate Sector 6. Private sector participants consist of companies such as the ROSAL Group and Romprest Service SA. Instances of public-private cooperation can be observed in the waste management systems of counties like Sibiu, Timisoara, and Arad. Furthermore, international firms such as Veolia, Suez, and FCC Environment are also active in some urban areas. A significant challenge facing this sector is the shortage of both skilled and unskilled labour. This shortage is primarily driven by inconsistent working conditions, as well as various risks and violations present in the workplace. A stakeholder noted that while general working conditions have seen improvements, employees remain susceptible to numerous diseases due to inadequate protective measures.

## Serbia

The waste management sector is predominantly comprised of state-owned enterprises established by cities and municipalities, with a smaller portion operating as public-private partnerships. Currently, there is limited participation from multinational companies, with the most notable exception being a waste processing facility located in Vinča. Significant modernisation initiatives are in progress in major cities such as Belgrade, Novi Sad, Kragujevac, and Niš, which include the integration of electric and hydrogen-powered vehicles, as well as the adoption of innovative technologies. However, smaller municipalities with constrained budgets continue to utilise outdated equipment, suffering from minimal safety measures and inadequate health protections for their employees, alongside insufficient attention to environmental impacts. This situation persists despite the obligation of local authorities to formulate and execute waste management strategies and plans. Additionally, a particular challenge facing the sector is the scarcity of labour, as alternative job opportunities with comparable pay, such as

those in retail, do not require the physical demands associated with waste management.

### Slovakia

In Slovakia, large public organisations like OLO operate alongside smaller private firms that often cater to specific regions or municipalities. These companies offer a range of services, including the management of hazardous waste. Additionally, notable multinational corporations like Veolia, which primarily specialises in energy and building management rather than waste management, and Marius Pedersen a.s., a prominent Danish company recognised as one of Slovakia's largest waste management service providers, are present on the market. The current overcapacity in waste-to-energy processes has led to a reliance on waste generation and importation, which is detrimental to recycling initiatives. To establish stability and predictability in waste management, Slovakia requires a well-defined strategy. Furthermore, there is a pressing need for substantial enhancements in the accessibility and quality of data related to waste management practices.

### Slovenia

In Slovenia, the waste management industry primarily consists of limited liability companies, with a majority being owned by local municipalities. Alongside these public enterprises, there are private companies engaged in waste collection and recycling. The sector is currently experiencing a significant labour shortage due to various factors, including the unpleasant and often unhealthy conditions associated with the work. To mitigate this issue, employers are increasingly adopting automation and robotics. Nevertheless, many operations still necessitate manual labour, creating obstacles for future workforce strategies within the industry. Efforts are underway to encourage employment opportunities in this field and to showcase technological advancements in automation, emphasising that not all tasks require manual intervention.

## 2. Social dialogue and collective agreements in the sector

The data on the presence of trade unions and employers' organisations extracted from the country reports are shown below.

## Bulgaria

*Trade unions.* Waste management is almost not covered by trade unions. There are three trade unions at a sectoral level, although their coverage in waste collection companies is extremely low. On the trade union side, there are three federations, one of which is affiliated to [CITUB](#) (the Independent Trade Union Federation of Employees in Commerce, Cooperatives, Tourism, Credit and Social Services (ITUFECCS)—“CITUB”) and two others—CL “Podkrepa” (the National Federation, Trade, Services, Control Bodies and Tourism (NFTSCBT)—CL “PODKREPA”) and the Federation of Construction, Industry and Water Supply—Podkrepa (FCIW)—representing small numbers of employees in a few, still municipal companies.

*Employer organisations.* There are no employers’ associations in the waste sector. The [Bulgarian Recovery and Recycling Association \(BRRA\)](#) is a voluntary, non-profit, non-governmental association and a FEAD—European Waste Management Association—member.

## Croatia

*Trade unions.* In the capital, Zagreb, the municipal waste management company *Čistoća Zagreb* is part of Zagreb Holding, so its representative trade unions negotiate and sign collective agreements with the city administration as an employer. The biggest trade union is *Sindikat Čistoća Zagreb*, which has 750 members of the 1,750 employees in the company. In the city of Split, representative trade unions of the municipal waste management company *Čistoća Split* negotiate with the local government. The municipal company *Čistoća-Rijeka* is in charge of maintaining cleanliness and waste management in the city of Rijeka and its surroundings and its trade unions negotiate with the local administration. Most of the companies’ trade unions in the waste sector are members of the *Sindikat komunalnih radnika* (the Trade Union of Utility Workers), which is affiliated with the largest trade union federation, the [Union of the Autonomous Trade Union of Croatia \(UATUC\)](#). Some companies’ trade unions like *Nezavisni sindikat Čistoća Split* (the Independent Trade Union *Čistoća Split*) and *Sindikat Čistoća Zagreb* (Trade Union *Čistoća Zagreb*) are members of the second largest trade union federation *Nezavisni hrvatski sindikati* (the Independent Trade Union of Croatia).

*Employer organisations.* *Udruženje općina* (The Croatian Union of Municipalities), is a non-profit organisation based on the principle of voluntary association, founded by the Croatian municipalities to promote and protect their interests. Another is *Udruženje gradova* (The Croatian Union of Cities) with 127 members.

## Czechia

*Trade unions.* Trade Union in Services (*OS UNIOS*), reports having 34 trade union organisations covering 3,300 employees in 34 companies in waste management. Some of the employees in waste management are associated with the transportation trade union (*OS Doprava*), especially drivers (e.g. the trade union organisation in AVE).

*Employer organisations.* The Czech Waste Management Association (*Česká asociace odpadového hospodářství*).

## Estonia

*Trade unions.* Waste management workers have not formed a union. Some employees at the companies of Ragn-Sells and Keskkonnateenused are members of the Estonian Transport Workers' Union, but the union is very small, with only a few dozen members.

*Employer organisations.* There are no employers' associations in the waste sector.

## Hungary

*Trade unions:* *HVDSZ 2000* (Local Industry and Urban Economy Workers' Union 2000).

*Employer organisations:* Municipal Services Association.

## Latvia

*Trade unions.* Trade union representation is weak. The Latvian Trade Union of Public Service and Transport Workers represents workers in the waste sector in 8–9 companies (mainly in municipal waste management and utility

companies). As workers in the sector are poorly organised, the establishment of trade union organisations in two of the largest companies in the sector — the country's largest landfill site and one of the largest private waste management companies — should be seen as a success.

*Employer organisations.* The Latvian Association of Waste Management Companies (*Latvijas Atkritumu saimniecības uzņēmumu asociācija, LASUA*) is a member of the European Waste Management Association (FEAD) and represents over 50 companies across Latvia involved in waste collection and management. These companies cover almost 90% of the total market in the country.

## Lithuania

*Trade unions.* The Lithuanian Federation of Public Service Unions (*Lietuvos visuomeninių paslaugų profsąjungų federacija*) and the Lithuanian Industry Trade Union Federation (*Lietuvos pramonės profesinių sąjungų federacija*) are both affiliated to the national-level union — the Lithuanian Trade Union Confederation (*Lietuvos profesinių sąjungų konfederacija*). The second largest Lithuanian Trade Union, Soldarumas (*Lietuvos profesinė sąjunga "Solidarumas"*), probably also represents waste workers.

*Employer organisations.* The Association of the Municipal Utility Companies of Lithuania (*Lietuvos savivaldybių komunalinių įmonių asociacija, SKIA*), representing mostly municipal utility companies (including waste management), the Lithuanian Association of Regional Waste Management Centres (*Lietuvos regioninių atliekų tvarkymo centrų asociacija, RATCA*), which is mainly responsible for landfills, and the Lithuanian Association of Utilities and Waste Managers (*Lietuvos komunalinių ir atliekų tvarkytojų asociacija, LKATA*), which generally brings together private entities working in the field of utilities and waste management.

## Poland

*Trade unions.* The Federation of Trade Unions of Municipal and Area Workers in Poland (*Federacja Związków Zawodowych Pracowników Gospodarki Komunalnej i Terenowej w Polsce*) operates within the *Ogólnopolskie Porozumienie Związków Zawodowych* (The All-Poland Alliance of Trade

Unions, OPZZ). Naturally, this federation represents a broader spectrum of workers — they are not just workers in the waste sector.

Within the trade union, NSZZ Solidarność, it is possible to point to structures in the form of the Secretariat of Public Services (*Sekretariat Służb Publicznych*) and the National Section of Public Utilities and Housing (*Krajowa Sekcja Gospodarki Komunalnej i Mieszkaniowej*), as well as the National Section of Water and Sewage Workers (*Krajowa Sekcja Pracowników Wodociągów i Kanalizacji*) operating within the latter. Both of these structures, in isolated cases, bring together organisations representing workers in the waste sector.

*Employer organisations.* The Polish Chamber of Waste Management (*Polska Izba Gospodarki Odpadami*). The Association of “Polish Recycling” (*Stowarzyszenie “Polski Recykling”*). The National Chamber of Waste Management (*Krajowa Izba Gospodarki Odpadami*). The Council of Regional Municipal Waste Treatment Facilities — Employers’ Union (*Rada Regionalnych Instalacji Przetwarzania Odpadów Komunalnych — Związek Pracodawców*).

## Romania

*Trade unions.* The Federation of Trade Unions in Community Services (*Federația Sindicatelor din Servicii Comunitare — FSSCUP*). Trade union membership in the sector is relatively low.

*Employer organisations.* There are no employers’ associations in the waste sector.

## Serbia

*Trade unions.* In the sector, there are about 3,500 registered unions, most of which are members of the four largest union federations: the Confederation of Autonomous Trade Unions of Serbia, the Association of Free and Independent Trade Unions, the United Branch Trade Unions, and the United Trade Unions of Serbia ‘Sloga’, but there are also independent trade unions that are not members of any central trade union operating in the Republic of Serbia. These unions operate only in certain companies and are commonly called “in-house unions” (*kućni sindikati*).

*Employer organisations.* There are no employers' associations in the waste sector.

## Slovakia

*Trade unions.* 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 waste management.

*Employer organisations.* The municipalities as employers are associated with an umbrella organisation, the Union of Towns and Municipalities of Slovakia (*Združenie miest a obcí Slovenska, ZMOS*). The Association of Entrepreneurs in Waste Management (APOH). The Association of Waste Industry (*Zväz odpadového priemyslu, ZOP*). The Association of Independent Secondary Raw Materials Processors ([Asociácia nezávislých spracovateľov druhotných surovín, ANSDS](#)).

## Slovenia

*Trade unions.* The Trade Union of Public Utilities, Security, and Real Estate Workers of Slovenia (a member of the Association of Free Trade Unions of Slovenia) and *Neodvisnost* — The Confederation of New Trade Unions of Slovenia.

*Employer organisations.* The Employers Association of Slovenia (*Združenju delodajalcev Slovenije*) and the Chamber of Public Utilities of Slovenia (*Zbornica komunalnega gospodarstva Slovenije*).

In the vast majority of CEE countries (according to desk research and interviews in the CEECAW project), the degree of organisation of workers in the sector is minimal. The situation in Croatia and Serbia is slightly different.

In Serbia, the authors of the country report estimate that around 70% of workers in the sector are union members. It is difficult to determine the exact number of members because workers often have multiple union memberships, mainly for the financial support and other benefits provided by the unions. Although it may sound anecdotal, it is a fact that due to multiple



union memberships, there are often more union members than employees in these waste sector companies.

In this respect, it is worth mentioning the 2017 publication (EPSU 2017) which concludes: “The circular economy presents challenges and opportunities for trade unions. Recycling is an important aspect of the transition to a circular economy and should therefore be promoted. More research on working conditions in recycling plants is highly recommended, as initial research on recycling plants in Northern and Central Europe suggests that most working conditions are poor, that a predominantly migrant workforce is exploited and that wages are low. Organising these workers creates opportunities to facilitate a transition to a circular economy that is not only sustainable but also non-exploitative”. One can only nod in agreement that this idea is still fully valid.

**Unfortunately, and at the same time very worryingly, the country reports did not indicate that this situation will improve in the future (no visible plans/strategies to organise workers in the sector).** There is also no indication that the process of organising workers will increase as recycling processes expand.

None of the reports indicate a relationship between trade unions and employers’ organisations (there is a noticeable lack of employers’ organisations in CEE, e.g. no employers’ organisations in the sector in Estonia or Bulgaria).

The Hungarian report includes information on the formal functioning of the bilateral team—but no information on any results of joint meetings related to the area of waste management (on the sectoral level, special bipartite negotiation committees are created, where employers and trade unions are present. In Hungary, these committees are named ÁPBs *Ágazati Párbeszéd Bizottság* (APBs)—Sectoral Social Dialogue Committees. For the waste sector, the Sectoral Social Dialogue Committee on Urban Services (Településszolgáltatási Ágazati Párbeszéd) is present. Here, as an official representative is present, the HVDSZ 2000 is from the side of the trade unions, while on the side of the employers is the Municipal Services Association).

**The country reports also provide no examples of the impact of tripartite dialogue directly addressing the challenges or needs of waste management workers.**

**It is worth noting that there are no separate trade union structures representing these workers. The Bulgarian report suggests that because the trade union confederations covering waste management are involved in many other areas (mainly services), their leaders do not have a very precise idea of the situation in waste collection companies. The content of the other country reports seems to confirm indirectly that this situation is not unique to Bulgaria.**

Reports point to several reasons for poor organising. General misperception of trade unionism is one, with the fragmentation of the trade union movement being another. The report from Lithuania points directly to these two causes. Trade unions in Lithuania were negatively affected by a belief that they were a Soviet legacy, leading to reluctance among workers to join them. This perception is still persistent. The organisations faced huge challenges during the privatisation processes, losing members and attractiveness, and experiencing leadership shortages. This also affected trade unions in the utilities and waste sectors. Another important factor is the fragmentation of trade unions: trade unions at a company level are dispersed into multiple centres, hindering significant progress in trade union growth.

Some reports underline that with such expressed labour shortages, employers are forced to offer attractive working conditions and wages (for example the Estonian report states: “From the interviews, it was also understood that employees in the field of waste management can have better remuneration due to the large shortage of labour in this area and companies’ willingness to pay, and therefore they do not have the motivation to stand up for their interests”).

In the Slovenian report, there was a theme of the consequences of collective agreements with *erga omnes* effect (“Acquiring new members is challenging. There are several reasons, but according to a union representative, the fundamental reason is that the collective agreement has *erga omnes* validity, and consequently, workers do not see added value of membership. At the same time, they are aware of their shortcomings, such as not organising collective assemblies or attracting workers to the union. More effort needs to be invested in recognising the benefits of the union among workers. Smaller companies face greater difficulties in organising workers, where there is a lower awareness of the importance of the union, and the union representatives themselves lack sufficient knowledge and awareness of the importance

of their work. According to the union representative, this is a result of poor leadership by the Union President, which should be improved in the future”).

Another problematic aspect when unionising the employees is the workers’ education level. According to the stakeholders in Romania, employees with low levels of basic skills (literacy and numeracy) are more difficult to unionise. Education and wage aspects are often intermingled and amplified by other forms of social exclusions along intersectional lines among these workers. The literature showed that inequalities and marginalisation, including ethnical divisions/segregation, especially for Romani people, are linked with exploitation and participation in the informal economy. This point also resounded in the Bulgarian report.

Of course, on the basis of the country reports, some successes can also be claimed.

While the level of unionisation is low, successes are highlighted, such as the establishment of trade union organisations in two of the largest companies in the sector — the largest landfill site in the country and one of the largest private waste management companies in Latvia — or successful collective bargaining at OLO, a waste management company in Bratislava.

The situation is assessed somewhat more optimistically in Croatia (according to the interviewed trade union representatives, it is relatively easy to organise the members because they work mostly in one company in the municipality. Therefore, trade unions have quite a strong membership basis in the sector) as seen in this country’s concrete description of trade union success. In the municipal waste management company, *Čistoća Zagreb*, 160 workers worked for up to 6 years through temporary employment agencies. They were in a precarious form of employment relationship, deprived of many workers’ and financial rights, like a supplement for Christmas and Easter, and adequate covering of travel costs. Due to their insecure position, they were not able to take a bank loan. However, with persistent and dedicated work the *Čistoća Zagreb* trade union negotiated with the city’s government and enabled the mentioned workers to become employed for an indefinite time with all legal workers’ rights.

A second example of the concrete success of trade union action comes from Hungary. In 2022, garbage collectors employed by the Budapest Metropolitan

Public Area Maintenance (FKF) Company undertook strike actions in response to a previous statement issued by the head of the public relations office of the Budapest Public Utilities Company, which oversees FKF. This statement asserted that garbage collectors and waste carriers received monthly salaries ranging from 400,000 HUF to 500,000 HUF (approximately 1,050 to 1,300 EUR), whereas the actual compensation was found to be approximately half of that amount. In light of this situation, municipal companies reached an agreement with the HVDSZ 2000 trade union that included a one-time wage bonus of 200,000 HUF for the workers, as well as a Christmas bonus amounting to 150,000 HUF. Furthermore, a significant outcome of the negotiations was the joint revision and restructuring of the salary incentive components by the social partners, resulting in half of the incentive bonus being incorporated into the workers' basic salary.

The information extracted from the country reports about collective agreements is summarised below.

### Bulgaria

There is no collective bargaining at a sectoral level, and there are only a few collective agreements in companies (most of them municipal companies). In general, these agreements provide slightly better working conditions than the labour legislation.

### Croatia

In Croatia's waste sector, collective bargaining plays a pivotal role in shaping labour conditions and industry standards.

The success of collective bargaining varies greatly between individual cities. For example, in the city of Zagreb, there is a positive atmosphere and very encouraging results of collective bargaining, yet the situation in the city of Zadar is quite hostile often with conflicts and strikes.

The three largest collective agreements, with the largest number of employees in the waste sector, are the Collective Agreement for Employees in Zagreb Holding (*Kolektivni ugovor za radnike u trgovadkom drustvu Zagrebaeki holding d.o.o.*), followed by the *Kolektivni ugovor Čistoća d.o.o. Split* and *Kolektivni ugovor Čistoća Rijeka*.

## Czechia

Collective agreements in the sector are heterogeneous, as these are concluded at the level of organisations (or establishments).

Challenges related to working conditions and social dialogue in the sector evolve around low wages, severe labour shortages, seasonal work, and high turnover of employees. As reported by the trade union representative, even in unionised workplaces, it is challenging to attain a higher wage, as many workplaces are falling under the regulation of wages in the public sector, which limits opportunities for gains in collective bargaining. An emerging topic that can help promote the importance of social dialogue in the workplace is occupational health and safety (OSH). Sector-level trade unions employ specialists in the field, which can provide control at the workplace to help company-level trade unions, recognise and name the main issues in OSH. This is also valuable for employers, as they are required to ensure a safe workplace.

## Estonia

No collective agreements have been concluded in Estonia.

## Hungary

Information on collective bargaining and the specific wording of collective agreements in the waste sector is not available. Evidence suggests that collective bargaining does not take place at a sectoral level in this sector and that negotiations are therefore limited to a company level. Trade unions have expressed significant concerns about the challenges posed by the restrictive legal framework of Hungarian labour law, which can lead to an imbalance in power dynamics, particularly between employers and trade unions. The situation is further complicated by the representativeness criteria, which set a 10% membership threshold and may hinder effective bargaining.

## Latvia

As trade union representation in the waste sector is weak, collective bargaining coverage is minimal. If there is no trade union organisation in a company, Latvian labour law allows employees to conclude collective agreements through representatives of their choice. A collective agreement initiated by one of the largest employers in the sector, which manages waste in about

one-fifth of Latvia's territory, was concluded with employee representatives without the involvement of a trade union. The agreement provides for free transport to work, meals at work, work clothes, additional holidays, allowances for important life events, and collective activities for employees and their families, over and above what is required by law. Company websites in the sector suggest that these benefits are also offered by companies without a collective agreement.

The interviewed representative of the employer organisation expressed support for negotiations on the general agreement, as it would help bring order to the sector.

## Lithuania

According to the information, provided in the National Register of Collective Agreements, there are four currently valid collective agreements signed in companies with their main activities in NACE 38. In total, these agreements cover approx. 900 employees or 10% of sectoral employees. However, these figures might not show the real situation, first, because not all valid collective agreements might be registered at the Register and second, because waste workers are usually classified as public utility workers and usually work for public utility companies. It is therefore likely that collective agreements in companies, if they exist, cover all public utility workers, without excluding waste management workers.

Employers' associations claim they do not have a mandate from their members to sign sectoral collective agreements. Moreover, municipal employers are accountable to municipalities, which raises the question of whether each municipality will agree to provide funds to meet the needs set out in the agreements. The sufficiency of funds for the provisions of collective agreements is also called into question by the strictly state-regulated and limited profit ceilings of municipal enterprises.

In many cases, collective agreements deviate slightly from legislation. The respondent described the content of the collective agreements as follows:

“ All the collective agreements analysed mostly provide for additional compensatory or vacation days for employees, depending on seniority, benefits for childbirth, marriage, funerals, etc. Also, considerable attention is paid to guarantees for employee safety, allocation of funds for leisure, sports, and additional benefits for vacations, incentives,

specific guarantees for trade unions and the like. Yet, there is a lack of special provisions for professional training, retraining, information and consultation procedures, which would be important in the context of waste management companies.

## Poland

Collective agreements are concluded exclusively at a company level.

Unfortunately, they largely duplicate provisions stemming from the Labour Code. Of the issues that are often present (and which go beyond the norms of the Labour Code), one can point to procedures and deadlines for negotiating salary increases, as well as agreements that include elements of remuneration, such as seniority bonuses or specific allowances related to working conditions (e.g. allowances related to the collection of heavier waste).

## Romania

There is no collective agreement within the waste sector or among a group of units. The last collective contract was 2013–2014 and comprised 207 organisational units with activities related to public services, such as transportation, waste management, and water services.

## Serbia

Collective agreements have been concluded for the territory of the Republic of Serbia, the Autonomous Province of Vojvodina, Belgrade, and other cities and municipalities. These agreements have been established in nearly 95% of enterprises and employers in the sector.

## Slovakia

There was successful collective bargaining at OLO, a waste management company in Bratislava.

## Slovenia

The Collective Agreement for Public Utility Services.

Companies may also conclude collective agreements on a company level, but it is not mandatory.

The country reports draw attention to a problem that exists in collective bargaining in general and is not unique to this sector (the weakness of the collective agreement for public utility workers, which does not significantly differ from other sectoral collective agreements, lies in a large number of salary supplements, leading to considerable opacity and unmanageability of salaries. However, this is a problem of the entire salary model in Slovenia, both in the public and private sectors. The system of low wages with numerous supplements is indeed a reflection of the outdated socialist system and needs to be reformed).

### 3. The influence of European social dialogue

The [European Federation of Waste Management and Environmental Services](#) (FEAD) represents the private waste and resource management industry across Europe. Its members are national waste management associations in 18 member states, including Norway and Great Britain. The presence of organisations from the CEE area is indicated in a footnote<sup>3</sup>.

[Municipal Waste Europe](#) is the European representative umbrella organisation of public sector associations operating in the waste sector. Its members are national public waste management associations from 13 member states,

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3 Members from Central Eastern Europe

Bulgaria — [Bulgarian Recovery and Recycling Association](#) (BRRA) is a voluntary, non-profit, non-governmental association

Czechia — [The Czech Circular Economy Association](#) (ČAOBH) is a voluntary, non-political union of citizens and corporations connected by an interest in conserving primary resources, reducing costs at industrial concerns, and reducing negative impacts on the environment and human health by reducing the amount of waste produced

Estonia — [Estonian Waste Management Association](#)

Latvia — [Latvian Association of Waste Management Companies](#)

Poland — [Polska Izba Gospodarki Odpadami](#) (PIGO)

Affiliate members (Private companies or other legal entities of waste management and environmental services from a country already represented by a full member): Poland  
ELTE SMART

Associate members (Private companies or other legal entities of waste management and environmental services from a country not yet represented by a full member): A. R. S. M. D, Romania and ENERGESMAN, Lithuania



including Norway and Iceland. The presence of organisations from the CEE area is indicated in a footnote<sup>4</sup>.

[SGIEurope](#) represents employers and enterprises providing public services. SGIEurope favours the circular economy approach compared to a linear approach to waste management and in particular it advocates a quick ban on landfilling.

The [Council of European Municipalities and Regions](#) (CEMR) is a European association of local and regional authorities that defends the interests of those authorities as employers. The CEMR is a consulted partner in all European initiatives relating to working conditions and work organisation. Through the European social dialogue of local and regional governments, it works with EPSU to negotiate and agree on common solutions to European social policy. In a footnote, are listed the members of the CEE region<sup>5</sup>.

Regarding publicly-employed waste workers, social dialogue is taking place in the [Sectoral Social Dialogue Committee for Local and Regional Government](#), which was established by the European Commission in 2004. EPSU and the Council of European Municipalities and Regions (CEMR) are the most important EU-wide representatives of the sector's employers and

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4 Poland — [KIGO](#) (National Chamber of Waste Management)

5 Estonia — [Association of Estonian Cities and Municipalities](#)

Latvia — [Latvian Association of Local and Regional Governments](#)

Lithuania — [Association of Local Authorities in Lithuania](#)

Poland — [Association of Polish Cities](#) and the [Association of Polish Counties](#)

Czechia — [Union of Towns and Municipalities of the Czech Republic](#)

Hungary — [Hungarian National Association of Local Authorities](#) and the [Partnership of Hungarian Local Government Associations](#)

Croatia — [Croatian County Association](#) [Croatian Union of Municipalities](#)

Slovenia — [Association of Urban Municipalities of Slovenia](#)

Romania — [Association of Communes of Romania](#), [Romanian Municipalities Association](#), and the [National Union of County Councils of Romania](#)

Bulgaria — [National Association of Municipalities in the Republic of Bulgaria](#)

Serbia — [Standing Conference of Towns and Municipalities of Serbia](#)

employees<sup>6</sup>. However, the Social Dialogue Committee did not directly address the topic of waste management.

There are no known ad hoc joint opinions or positions signed by EPSU and the European Federation of Waste Management and Environmental Services (EFAD) or Municipal Waste Europe.

European works councils (EWCs) are a fundamental aspect of social dialogue. Veolia, Suez and PreZero have EWCs, but FCC, Remondis and Alba do not. There is, however, no study of EWC activity in the waste sector (it should also be remembered that for corporations such as Veolia or Suez, waste management is only a small part of the activity).

**It is therefore not surprising that with such a rudimentary form of European dialogue in the waste sector, it was not possible to ‘detect’ any impact on the dialogue at the level of the CEE countries.**

## 4. Conclusions

As can be seen from the need for action by the European Commission, which can be diplomatically described as a call for Member States to mobilise, the vast majority of countries are not doing what is necessary to meet the commonly agreed indicators<sup>7</sup>. However, if progress is to be made, one of

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6 The last joint position (in any area of work) was created in 2020, [https://employment-social-affairs.ec.europa.eu/policies-and-activities/european-employment-strategy/social-dialogue/social-dialogue-texts-database\\_en](https://employment-social-affairs.ec.europa.eu/policies-and-activities/european-employment-strategy/social-dialogue/social-dialogue-texts-database_en)

7 Confirmation that countries are not fulfilling the obligations they have assumed under certain policies and directives is proved by the fact that the European Commission has decided to open infringement proceedings by sending letters of formal notice to each of its 27 members for failing to meet waste collection and recycling targets. Based on the latest available data reported by European Union members, the Commission assesses that all have failed to meet several waste collection and recycling targets set under current EU legislation.

Each country now has two months to respond and address the issues raised by the Commission. If the responses are deemed unsatisfactory, the Commission may issue a reasoned opinion asking the countries to comply with EU law. If issues remain unresolved, the Commission may refer the matter to the EU Court of Justice. [https://ec.europa.eu/commission/presscorner/detail/en/inf\\_24\\_3228](https://ec.europa.eu/commission/presscorner/detail/en/inf_24_3228)

the success factors (which seems to have been forgotten) is a motivated workforce.

The waste industry is currently facing labour shortages and an ageing workforce. Due to its physically demanding nature, the industry is less attractive to younger generations, resulting in a demographic shift towards older workers. This trend could exacerbate labour shortages, particularly in jobs requiring physical labour, as older workers retire and fewer younger people enter the industry. As it has been stressed here on many occasions, working in this sector is associated with very little prestige, which also makes it difficult to attract employees.

The question that naturally arises is to what extent social dialogue can be an answer to the challenges that lie ahead. Unfortunately, we have to be very sceptical about a positive answer to such a question.

The country reports showed a low level of trade union organisation among workers (except for Croatia and Serbia). This confirms earlier predictions. However, what is most worrying (at least to the author of the comparative report) is that there is no visible plan for organising on the part of the trade unions.

Trade unions face understandable limitations in organising waste management workers. Reports from Romania and Bulgaria highlighted the problem of difficulties in organising people with very low levels of qualifications, including social qualifications, and those experiencing ethnic exclusion (Roma).

Country reports did not show even any informal or ad hoc relations of trade unions representing waste management workers with employers' organisations.

A problem in some CEE countries is the lack of sectoral employer organisations and the existence of only sector-specific associations. However, the reports did not show any trade union relationships (fairly regular meetings as part of some formal or practice-based team or group) with associations or organisations, including employer organisations, representing waste management and recycling in the broad sense. Nor did the reports show that trade unions have any defined demands regarding working conditions in the sector (including health and safety or lifelong learning), which they would formally communicate to public authorities.

**Another issue is the proliferation of waste management workers among unionised water, sewage, or urban transport workers. It has been reported that the number of union structures exclusively representing waste management workers is very limited. It is reasonable to assume that even within the internal structure of the trade union movement in Central and Eastern Europe, these workers do not have the possibility of a breakthrough with their needs and expectations.**

**This observation seems worth highlighting, as it calls for reflection within the trade union movement itself.**

We are all witnessing the dismantling of ‘brown’ jobs in the economy, and the consequence is the loss of trade union members employed in ‘brown’ jobs. From the unions’ point of view, this is not only a loss of a relatively well-paid membership base (these were jobs covered by collective bargaining and therefore relatively well-paid), but it is also a loss of jobs where the unions could point to themselves as co-organisers of working conditions and pay (Zwysen 2024).

The role of collective bargaining must be emphasised here, not as a source of better working conditions and pay for workers, but as a source of social and economic legitimacy for the trade union movement. To maintain their legitimacy, unions need to focus on organising workers in the emerging ‘green’ jobs (and this includes jobs in the wider recycling process) and seek to bring workers in this sector under collective bargaining. This is about the trade union movement’s ability to demonstrate its commitment and participation in the ongoing process of economic and social transformation, usually referred to as the ‘twin transition’.

Demonstrating the usefulness of trade unions as actors in the twin transitions<sup>8</sup> could be a new source of strengthening their legitimacy. The research carried out as part of the CEECAW project did not look at the organisation and representation of workers in CEE in new ‘green’ workplaces but rather a small segment related to waste management. However, there is no evidence that trade unions in any of the countries covered have a strategy aimed at organising workers in waste management and recycling. The interviews

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8 ‘Twin transition’ means the process of change associated with the digitalisation and greening of the economy. These changes affect each other, which is why the term ‘twin transition’ has been adopted.

suggest that there are no trade union structures dedicated to these workers and that they are not visible within the public service trade union structure itself. In addition to the assessment from Croatia, the interviews and desk research indicated an insufficient level of organisation.

Main findings:

- The level of organisation of workers in the waste sector in the CEE countries is very low (an extreme example is Estonia, where the researcher points to the complete absence of any trade unions in the sector).
- There is no separate trade union structure in the CEE countries dealing with the organisation and representation of workers in the waste sector. This is the case in Poland, for example, where there is no section within NSZZ Solidarność responsible for the sector. The lack of a separate structure (distinct from that of workers in services such as water and sewage or transport) results in a disastrously low level of unionisation in private companies in the sector.
- There is no evidence in the country reports that national trade unions in CEE have a strategy for the future organisation of these workers or for putting more emphasis on organising and representing them.
- In order to maintain (let alone increase) the current level of membership, it is necessary to organise workers in 'green' sectors — recycling being one of them. Trade unions in CEE have a weak presence in the classic stages of waste processing (collection) and their presence in companies involved in various recycling processes is even weaker.
- Lack of information on trade union action to address the specific needs of waste management workers in the areas of health and safety or lifelong learning.
- Labour shortages in the sector are reported in almost all CEE countries — but it cannot be assumed that trade unions in CEE can act as an effective factor in improving the quality of jobs (based on the findings above).

## 5. Recommendations

For national trade unions:

- ^ Take steps to assess whether it is possible to increase the pressure to organise workers in the sector and to develop a plan to increase the membership base, including waste management workers employed in the private part of the sector.
- ^ Carry out an analysis of the situation of workers in the waste sector in terms of their training needs, health and safety risks — to develop and present demands in these areas externally, and ultimately to start a dialogue on them with the employers' organisations in the waste management and recycling sector (or business associations in the absence of employers' organisations) and the public authorities.

For the European trade union structure:

- ^ Given the lack of formal structures for social dialogue in the waste sector, the possibility of working together with European employers' organisations should be explored to develop impulses that could inspire action at the national level.
- ^ Trade union representatives at a national level would benefit from the EU-level social dialogue that regulates the sector, especially when it comes to occupational health and safety and its consultation with workers' representatives, or issues related to access to information on the implementation of new technologies. Ultimately, social partners at the EU level should agree on recommendations covering these issues in the sector.

For national authorities in CEE:

- ^ The countries lack adequate vocational training programmes for the waste management workforce. Industry representatives highlight the need for higher-level vocational training.
- ^ Develop targeted strategies to attract younger workers into the sector.

For the European institutions:

- ^ Strengthen social dialogue on health and safety issues by involving workers in the development and enforcement of safety standards.
- ^ Promote dialogue on the impact of digitalisation and automation to ensure that workers are not left behind when new technologies are introduced.

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