

# Study to Identify Member States at Risk of Non-Compliance with the 2020 Target of the Waste Framework Directive and to Follow-up Phase 1 and 2 of the Compliance Promotion Exercise

---

## Final Report: Appendix 1 – Member State Performance Data

**Dr Dominic Hogg**  
**Timothy Elliott**

20<sup>th</sup> March 2018

Report for the European Commission, DG Environment, Waste  
Management and Secondary Materials Unit

Prepared by Timothy Elliott

Approved by



.....  
Dr Dominic Hogg  
(Project Director)

Eunomia Research & Consulting Ltd  
37 Queen Square  
Bristol  
BS1 4QS  
United Kingdom

Tel: +44 (0)117 9172250  
Fax: +44 (0)8717 142942  
Web: [www.eunomia.co.uk](http://www.eunomia.co.uk)

*Disclaimer*

Eunomia Research & Consulting has taken due care in the preparation of this report to ensure that all facts and analysis presented are as accurate as possible within the scope of the project. However, no guarantee is provided in respect of the information presented, and Eunomia Research & Consulting is not responsible for decisions or actions taken on the basis of the content of this report.

## Contents

---

|            |  |          |
|------------|--|----------|
| <b>1.0</b> | <b>Current Recycling Performance .....</b>   | <b>1</b> |
| <b>2.0</b> | <b>Future Recycling Performance.....</b>     | <b>4</b> |
| 2.1        | Countries not Retained for Phase 2.....      | 6        |
| <b>3.0</b> | <b>Programme of Member State Visits.....</b> | <b>8</b> |



## 1.0 Current Recycling Performance

Details of historic recycling performance – as measured by Member States’ chosen calculation methods – were provided by the European Commission and are presented in Table 1-1. The 20 Member States who’s reported recycling rates were below 50% in the latest year for which data was provided were consulted individually as part of Phase 1 of the study and these countries are shown in Table 1-1.

**Table 1-1: Member State Historic Recycling Rates Reported Under Chosen Calculation Methods**

| Member State   | Calculation Method | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   |
|----------------|--------------------|--------|--------|--------|--------|--------|--------|
| Austria        | Method 2           | 78.60% | -      | 78.80% | -      | 86.50% | -      |
| Belgium        | Method 3           | 57.90% | 58.50% | 56.50% | 57.60% | 58.70% | 57.40% |
| Bulgaria       | Method 4           | 29.00% | 31.50% | 28.20% | 30.10% | 30.80% | 29.30% |
| Croatia        | Method 2           | -      | 15.40% | 26.20% | 26.20% | 21.90% | 24.70% |
| Cyprus         | Method 2           | 21.60% | 25.90% | 25.10% | 27.70% | 28.60% | 28.20% |
| Czech Republic | Method 2           | 37.90% | 49.60% | 45.50% | 45.60% | 48.30% | 49.10% |
| Denmark        | Method 1           | -      | -      | 51.70% | 51.90% | 52.70% | -      |
| Estonia        | Method 2           | -      | 26.70% | 26.80% | 31.20% | 35.00% | 32.60% |
| Finland        | Method 4           | 32.60% | 34.80% | 33.30% | 32.50% | 32.60% | 40.00% |
| France         | Method 2           | -      | 59.40% | -      | -      | -      | -      |
| Germany        | Method 4           | 62.50% | 63.00% | 65.20% | 63.80% | 65.60% | -      |
| Greece         | Method 2           | -      | -      | -      | 26.20% | 25.70% | 26.50% |
| Hungary        | Method 2           | 34.20% | 39.80% | 38.50% | 39.00% | 40.60% | 42.00% |
| Ireland        | Method 1           |        | 44.50% | 44.50% | 46.90% | 44.60% | -      |
| Italy          | Method 2           | 36.70% | 38.50% | 41.10% | 42.00% | 45.00% | 46.00% |
| Latvia         | Method 4           |        |        | 18.40% | 25.80% | 26.90% | 26.80% |
| Lithuania      | Method 2           | 37.20% | 43.20% | 42.00% | 41.00% | 42.40% | 45.50% |
| Luxembourg     | Method 2           | 50.60% | 49.80% | 50.30% | 50.00% | 51.50% | -      |
| Malta          | Method 1           | -      | 22.80% | 22.60% | 21.70% | 19.00% | 16.00% |
| Netherlands    | Method 2           | 47.50% | 49.30% | 50.70% | 50.00% | 49.30% | 50.60% |
| Poland         | Method 2           | -      | -      | 18.40% | 23.50% | 26.10% | 26.00% |
| Portugal       | Method 2           | 18.60% | 19.20% | 22.20% | 27.70% | 29.20% | 32.40% |
| Romania        | Method 4           | 12.80% | 11.70% | 14.80% | 13.20% | 13.10% | 13.00% |
| Slovakia       | Method 4           | 9.30%  | 13.40% | 12.90% | 12.10% | 10.30% | 20.10% |
| Slovenia       | Method 4           | 22.10% | 34.20% | 42.00% | 34.90% | 36.00% | 37.10% |
| Spain          | Method 4           | 29.20% | 26.70% | 29.80% | 32.50% | 30.80% | 33.00% |
| Sweden         | Method 2           | 62.00% | -      | 62.20% | -      | 61.40% | 61.40% |

| Member State   | Calculation Method | 2010   | 2011   | 2012   | 2013   | 2014   | 2015   |
|----------------|--------------------|--------|--------|--------|--------|--------|--------|
| United Kingdom | Method 3           | 40.40% | 42.90% | 43.90% | 44.10% | 44.90% | 44.30% |

*Source: Information made available by the European Commission and includes data supplied to Eurostat and submitted as part of Member State Waste Framework Directive Implementation Reports.*

*Note that for some countries, as will become clear, reporting under Method 4 in the Implementation Reports is not consistent with the reporting to Eurostat under the Eurostat / OECD Joint Questionnaire (whereas it should be). Also, some countries offered more up to date data against their chosen method.*

Table 1-2 indicates the countries included and not included in Phase 1.

**Table 1-2: Overview of Member States Calculation Methods, Recycling Rates, and Inclusion in the Early Warning System Process**

| Member State   | Calculation Method    | Year of Data | Reported Recycling Rate Under Chosen Calculation Method | Country Included in Phase 1 of the Early Warning System Process |
|----------------|-----------------------|--------------|---|---|
| Austria        | Method 2              | 2014         | 86.50%  | No  |
| Belgium        | Method 3              | 2015         | 57.40%  | No  |
| Bulgaria       | Method 4              | 2015         | 29.30%  | Yes   |
| Croatia        | Method 2              | 2015         | 24.70%  | Yes   |
| Cyprus         | Method 2              | 2015         | 28.20%  | Yes   |
| Czech Republic | Method 2              | 2015         | 49.10%  | Yes   |
| Denmark        | Method 1              | 2014         | 52.70%  | No  |
| Estonia        | Method 2              | 2015         | 32.60%  | Yes   |
| Finland        | Method 4              | 2015         | 40.00%  | Yes   |
| France         | Method 2              | 2011         | 59.40%  | No  |
| Germany        | Method 4              | 2014         | 65.60%  | No  |
| Greece         | Method 2              | 2015         | 26.50%  | Yes   |
| Hungary        | Method 2              | 2015         | 42.00%  | Yes   |
| Ireland        | Method 1              | 2014         | 44.60%  | Yes   |
| Italy          | Method 2              | 2015         | 46.00%  | Yes   |
| Latvia         | Method 4              | 2015         | 26.80%  | Yes   |
| Lithuania      | Method 2              | 2015         | 45.50%  | Yes   |
| Luxembourg     | Method 2              | 2014         | 51.50%  | No  |
| Malta          | Method 1              | 2015         | 16%.00  | Yes   |
| Netherlands    | Method 2              | 2015         | 50.60%  | No  |
| Poland         | Method 2              | 2015         | 26.00%  | Yes   |
| Portugal       | Method 2              | 2015         | 32.40%  | Yes   |
| Romania        | Method 4 <sup>1</sup> | 2014         | 13.10%  | Yes   |
| Slovakia       | Method 4              | 2015         | 20.10%  | Yes   |
| Slovenia       | Method 4              | 2015         | 37.10%  | Yes   |
| Spain          | Method 4              | 2014         | 30.80%  | Yes   |
| Sweden         | Method 2              | 2015         | 61.40%  | No  |
| United Kingdom | Method 3              | 2015         | 44.30%  | Yes   |

<sup>1</sup> Romania is considering changing the method, but no data on its performance according to Method 2 is currently available.

*Source: Information made available by the European Commission and includes data supplied to Eurostat and submitted as part of Member State Waste Framework Directive Implementation Reports.*

## 2.0 Future Recycling Performance

---

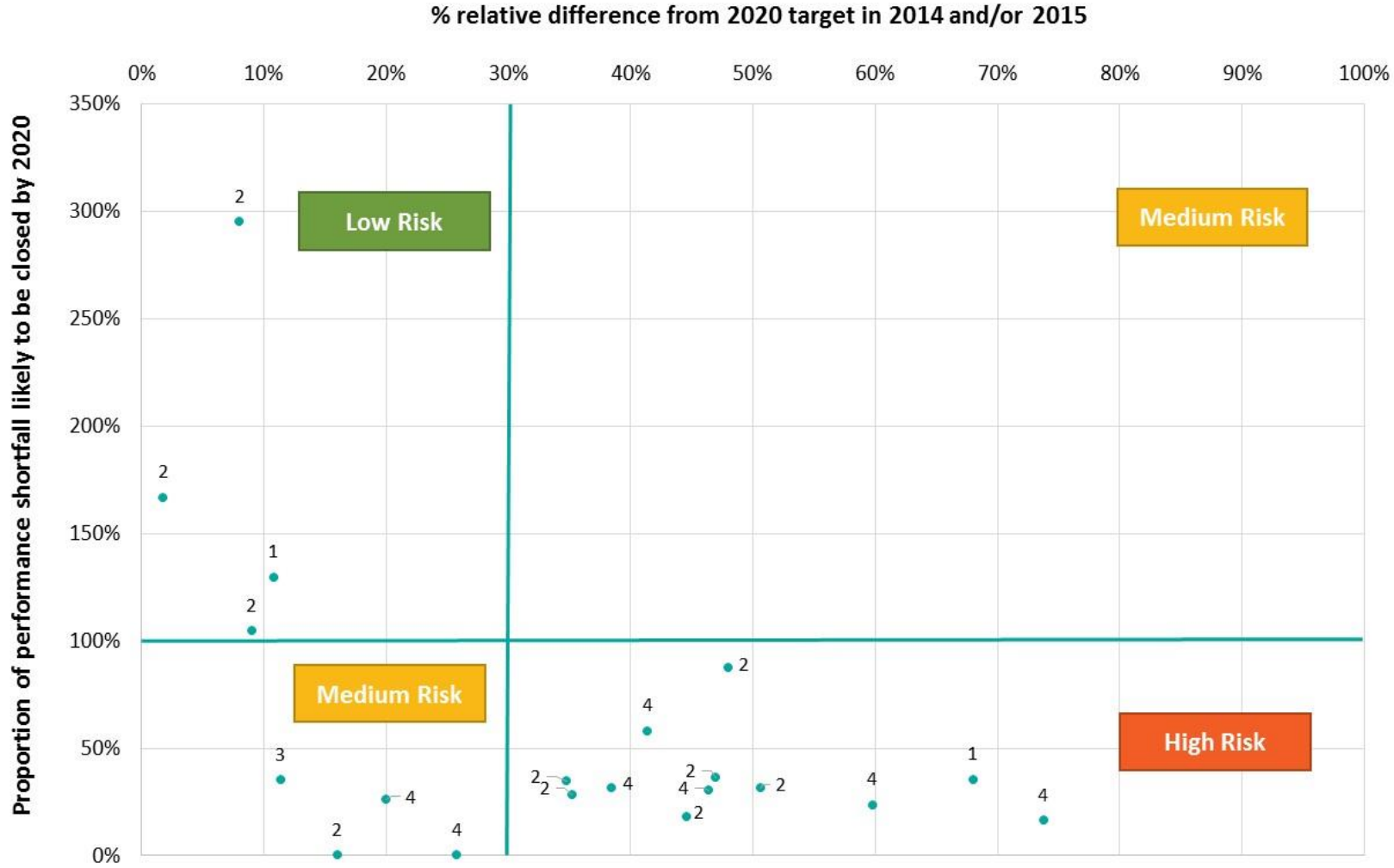
Figure 2-1 provides a visualisation of the results of the Phase 1 assessments. Further details regarding the review of each of the member states involved in Phase 1 of the project, can be found in the relevant separate country reports, prepared as part of this project.

In Figure 2-1, each country is represented by a data point, and the number beside the point indicates the chosen method for reporting performance. The x-axis indicates the proportion of the target still to be met: it expresses the 'distance to target' as a fraction of the target itself (so, if the Member State has a latest performance figure of 25%, then in order to achieve the 50% target, they have a further 50% of the target to meet. The higher this number, a priori, the more likely Member States are to fail to meet the target.

However, in principle, Member States could have already put in place a plethora of measures that actually make it quite likely that the performance gap will be closed. Arguably, it is easier for small countries to move further at a faster pace than larger ones. The y-axis indicates the proportion of the gap we expect to be closed by policies already in place, and policies already being implemented (or firmly planned). The y-axis has figures in excess of 100%, indicating by how far we believe some countries may clear the hurdle that currently faces them.



**Figure 2-1: Summary of Risk Considering Likely Relative Difference From Target and Proportion of Performance Shortfall**



## 2.1 Countries not Retained for Phase 2

During Task 2 of the project, twenty member states were selected for inclusion within Phase 1 of the project. During March 2017, fourteen of these countries were visited by the project team. The estimated level of future performance is based on reviews and visits for these 14 countries. Six Member States not yet recycling 50%, were not retained for Phase 2. The rationale for this decision is list below:

- **Ireland** – Provisional conclusions – made in the absence of receiving an update from the authorities – have concluded that Ireland could increase its recycling rate by a further 5-9% by 2020 under Method 1. This would bring the country's recycling rates to 49-53%; as such, Ireland is deemed to be at relatively low risk of missing the 2020 target. Further details of the country's risk ranking, relative to other Member States, is provided in the main report to which this Early Warning Report is appended.
- **Czech Republic** – It was concluded that the Czech Republic could increase recycling rates by a further 2% by 2020 under Method 2. This would bring the country's recycling rates to 51%. However, there are some ongoing issues with data reporting that may lead to a decrease in the reported recycling rate. There is therefore some risk that the Czech Republic would miss the target, however, on the basis of the existing data they were not taken through to Phase 2.
- **United Kingdom** – It was concluded that the United Kingdom could increase recycling rates by a further 2% by 2020 under Method 3. This would bring the country's recycling rates to 45%. Strong performance in Wales and potential in Scotland could improve this further. In addition, it seems likely that the UK could meet the 50% target by switching its chosen method of reporting to Method 1. However, it is worth noting that cuts in local government budgets have made it more difficult for local authorities to focus on enhancing their services.
- **Lithuania** – In summary, it was concluded that Lithuania could increase recycling rates by a further 4.7% by 2020 under Method 2, if no changes to the deposit system are made and no further measures are taken which undermine the system's performance. This would bring the country's recycling rates to 49.7%. There have been positive trends in recent years, and therefore, given the estimated figure is very close to 50%, Lithuania was not taken forward to Phase 2. However, given the closeness of the estimate it is important to point out that there are still risks to meeting the target and appropriate effort must be given by the Ministry of Environment to ensure it is met.
- **Italy** – In summary, it was concluded that Italy could increase recycling rates by a further 14% by 2020 under Method 2. This would bring the country's recycling rate close to 60%.
- **Slovenia** – In summary, current data (for 2015) as provided to Eurostat indicates that Slovenia has already met the 50% recycling target under

Method 4. However, improvements in the quality of the data are expected to reduce performance for dry recycling, such that its performance would then fall below that required to meet the target. It is difficult to give a clear estimate as to the likely performance in 2020 for the simple reason that current performance remains to be confirmed. Improvements in the data may reduce overall performance considerably, perhaps to little more than 40%. There is clearly scope for Slovenia to make good some of the shortfall over the next few years through the roll out of door to door dry recycling services in under-performing areas, which may take it back towards, and potentially in excess of, 50%.

## 3.0 Programme of Member State Visits

---

This sections provides a summary of the meetings carried out with the twenty Member States listed below. All meetings in Phase 2 were held face-to-face, with relevant representatives in each of these countries being present.

Information gathered through these meetings allowed for a picture of historic, current and likely future trends in municipal waste management to be developed. In all cases, draft priority actions were developed and discussed in advance of the meeting to ensure the most efficient use of the time available.

| Country               | Phase 1         | Phase 2    |
|-----------------------|-----------------|------------|
| <b>Bulgaria</b>       | 19/04/2017      | 06/10/2017 |
| <b>Croatia</b>        | 16/03/2017      | 12/10/2017 |
| <b>Czech Republic</b> | n/a             | n/a        |
| <b>Cyprus</b>         | 21/03/2017      | 21/10/2017 |
| <b>Estonia</b>        | 15/03/2017      | 08/06/2017 |
| <b>Finland</b>        | 13/03/2017      | 15/08/2017 |
| <b>Greece</b>         | 14/03/2017      | 18/07/2017 |
| <b>Hungary</b>        | 01/03/2017      | 10/07/2017 |
| <b>Ireland</b>        | 19/06/2017      | n/a        |
| <b>Italy</b>          | 14/03/2017      | n/a        |
| <b>Latvia</b>         | 22/03/2017      | 13/09/2017 |
| <b>Lithuania</b>      | 17/03/2017      | n/a        |
| <b>Malta</b>          | <i>Declined</i> | 02/08/2017 |
| <b>Poland</b>         | <i>Declined</i> | 04/10/2017 |
| <b>Portugal</b>       | 17/03/2017      | 06/09/2017 |
| <b>Romania</b>        | 16/03/2017      | 06/09/2017 |
| <b>Slovakia</b>       | 27/03/2017      | 14/09/2017 |
| <b>Slovenia</b>       | 09/03/2017      | n/a        |
| <b>Spain</b>          | 17/03/2017      | 05/07/2017 |
| <b>United Kingdom</b> | n/a             | n/a        |

