



THE REPORT IN BRIEF

The Benchmarking Report on Solid Waste Management in South-East Europe 2019 has been prepared as a joint effort by the members of NALAS Task Force on Solid Waste and Water Management from eleven Local Government Association (LGAs), utilizing data from 2018 from ten economies in the region.

This is the third edition of the Benchmarking Report, aimed to follow the developments in the waste management sector in the region and to show trends, but also to foster sharing of insights on the factors influencing such trends and exchange of good practices among LGAs in South-East Europe (SEE).

This edition of the Benchmarking Report introduces the Circular Economy as EU paradigm and tool for decoupling of economic growth and pressure on the environment and natural resources. The Report helps to improve the understanding about Circular Economy and its implementation in the observed economies.

MAIN FINDINGS OF THE REPORT

- This edition of the Report shows a **positive trend in the waste management sector** at the level of NALAS members' economies. The most obvious differences within the region of SEE are between EU members and candidate economies.
- If compared with the EU28, the Gross National Income (GNI) of the SEE economies clearly shows the **unfavourable economic situation** in the region. The EU28 average (38.705 \$ per capita) is **four times higher** than the average GNI of SEE (9.652 \$ per capita). Comparing with 2015, it is notable that all economies have increased income levels, which indicated economic development in the region.
- The **average waste generation per capita in the region is 0,95 kg/day**, which is less than the EU 28 average of 1,33 kg/day.
- The 2014 GNI per capita has increased for more than double in the target economies. However, average **waste production per capita is mainly keeping steady** from 2014 to 2018 with insignificant upward trend. Yet, the economic development and waste generation are still coupled which requires more efforts to be in place for **shifting the national economies of SEE towards the circular economy**.
- **79,6%** of the population in SEE region is covered by **municipal solid waste management service**. Croatia and Turkey are close to reaching the target of 100% with a value of 99% each. The rest of the target economies are around the SEE average, while Moldova has only 35,2% of the population covered with solid waste management service.
- **Waste composition** reported by pilot municipalities shows a prevalence of the **biodegradable waste**, with up to **55%** of the total waste volume. On the other hand, there are only modest efforts to exploit the opportunities of biological waste treatment.
- **Landfilling remains the primary option for waste treatment** in SEE with an average of **79%** of the generated waste disposed on landfills. The amount of landfilled waste shows an upward trend (from 67,3% in 2014, 77,5% in 2015 to 79% in 2018) which is far from the EU28 average of 46,4% (2017). 99,5% of the generated waste in Macedonia is disposed on the landfills, while in Albania around 60%.

- **Biological treatment** of waste is available in Bosnia and Herzegovina, Romania, Croatia and Turkey, although in a very small amount of less than 1%. Substantial 10% of **thermal treating** of waste is implemented only in Romania, accompanied with Croatia, with only 0,05%.
- The greatest progress in the SEE region has been made in controlling waste disposal, which is visible by the **decrease in the number of illegal dumpsites** and thus decrease of the percentage of illegal dumping from 20,8% in 2015 to 14.2% of the total waste generated in 2018. Still, **majority of municipal solid waste is disposed at noncompliant landfills** and illegal dumping sites. Turkey, Serbia, B&H, and Kosovo¹ have more sanitary landfills, but still insufficient considering their population. A large number of non-compliant landfills, 1147, have been reported in Moldova. Only B&H and Montenegro reported **landfills for inert waste**.
- 57,1% of the population in South-East Europe is covered by compliant landfills. Serbia, Albania, B&H, and North Macedonia have less than half of the population covered by compliant landfills, Moldova only 0,8%, while Kosovo* and Croatia have the biggest coverage of 92% and 97,2% respectively.
- The **region is still struggling with recycling** although the majority of economies are showing upward trends. Despite the very high percentage of waste recovery by recycling in Slovenia (58,9%), the overall recycling rate for municipal waste in the region is three times smaller (15,5%) than the EU28 average of 46,4%. The full potential of separate waste collection and recycling of Refuse-derived Fuel (RDF) is not adequately exploited.

Only 13 out of 21 sample municipalities included in the survey have reported recycling activities. Only 6 out of these 13 have reported a more significant recycling rate of over 20%.

- The **material footprint** is an indicator showing domestic material consumption per capita. A higher value indicates greater pressure of the economy to natural resources. It also shows the potential for waste generation in the respective target economy. Several economies in the region are above EU28 average which is 13,8 t/capita. Namely, Romania and Bulgaria are well above (21,56 and 19,60 t/capita), while Serbia, Slovenia, and Montenegro are slightly above this line. The others are below the EU average with Moldova showing the smallest value of 7,7 t/capita.
- The **circular economy** in the majority of SEE economies except for Slovenia is still a relatively new, unknown, not promoted and low priority topic.
- The most common **pricing method** among the sample municipalities is still m² of the household regardless of the amount of waste generated.

The average waste management **fees collection ratio** in the sample municipalities is 78%, where the urban areas have a higher collection rate than rural.

- The **informal sector** in solid waste management is present in almost all sample municipalities. It is not recognised neither by the authorities nor by the legal framework. Informal waste pickers are found in low-income communities with income below the poverty line, among unemployed people and homeless people. The most common type of waste collected by informal waste pickers is metal, PET and paper.
- Even though most of the participating economies have regulations that are governing waste management data collection and reporting, it can be observed that **reporting systems aren't fully implemented**, which to some extent compromises data reliability. Furthermore, in some cases, the data is missing or given based on estimates rather than measurements.



* This designation is without prejudice to positions on status, and is in line with UNSCR 1244 and the ICJ Opinion on the Kosovo Declaration of Independence.