



## NEWSFLASH

# Waste management Polen

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### Polish waste overview

#### Status of Waste Management Sector in 2011

9828 thousand tons of municipal waste was collected in Poland in 2011. Where was most waste produced? How much of it is recycled or was dumped at landfills?

Although in comparison to 2010 the amount of collected municipal waste decreased by 2,2%, the total amount of waste generated has increased. In 2011 it was 12 129 thousand tons, while in the previous year 12 038 thousand tons - according to the latest Polish Statistical Office report.

The highest amount of municipal waste was collected in the following voivodeships (in thousand tons): Mazowieckie (1450), Slaskie (1361), Wielkopolskie (928,4) and Dolnoslaskim (915), while the lowest amount in voivodeships: Swietokrzyskie (196), Podlaskie (252) and Opolskie (259).

In 2011 57,9% of municipal waste was collected by private companies (58,3% in 2010), 40,3% by public companies (39,9% in 2010) and remaining 1,7% by private-public companies (share similar to 2010).

In 2011 each citizen generated about 315 kg of municipal waste, while municipal waste collected per capita amounted to about 255kg. Most of the non-segregated waste (69,8%) was collected in households. The next significant sources of non-segregated waste were trade, small enterprises, offices and institutions (25%). Waste generated in municipal areas like streets, parks etc. amounted to 5,2% of total amount of non-segregated municipal waste (in previous year it was respectively 68,6%, 26%, 5,4%).

In 2011 in 2390 municipalities collected segregated waste, from this biodegradable waste was collected by 1031 municipalities, electronic waste by 1289 municipalities (in 2010 it was respectively 939 and 1113 municipalities). Only 89 municipalities didn't collect segregated waste (in 2010 it was 110 municipalities).

In 2011 most of the collected segregated waste was generated by households (mainly glass waste). Segregated waste collected in small enterprises, offices and institutions (mainly paper) amounted to 17,4%. Waste from municipal services (mainly biodegradable waste) amounted to 14,3 of total amount of municipal segregated waste. In the previous year it was respectively 69,4%, 17% and 13,6%.

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The amount of collected segregated waste increased from 8,6% in 2010 to 10,0% in 2011. Total weight of segregated waste collected in 2010 increased from 860 thousand tons to 984 thousand tons in 2011. In 2011 268,7 thousand tons of glass was collected for recycling (27,3% of total collected segregated waste). Collected paper and cardboard amounted to 174,6 thousand tons (17,7%), biodegradable waste 210 thousand tons (21,3%) and plastic 157,3 thousand tons (16%). The amount of collected waste has increased comparing to 2010 by 24,4% for glass, 2,8% for paper and cardboard, 26,9% for plastic. In 2011 16,9 thousand tons of metals was collected, that is 2,8% more than in 2010.

The amount of municipal waste collected on landfills decreased from 73,4% in 2010 to 70,9% in 2011. The actual weight of land filled waste amounted to 6967,1 thousand tons in 2011.

In 2011 98,3 thousand tons of municipal waste was incinerated, which is 4,1% less than in 2010. The share of incinerated waste in total collected municipal waste did not change and remained at the level of 1%. In 2011 about 1643,9 thousand tons of municipal waste was treated mechanically and biologically. That concerned mainly waste from gardens, parks, and kitchen waste. In comparison to the previous year share of the waste treated mechanically and biologically in total amount of collected municipal waste increased to the level of 16,7%. About 344,2 thousand tons of waste designed to recycling was sorted out from non-segregated municipal waste.

At the end of 2011 there were 578 existing municipal waste landfills. In total they covered area of 2350 ha. During 2011 58 municipal landfills with total area of 190 ha were closed. In 2011 428 landfills were equipped with out gassing system, while in 64,5% had gas escaped into the atmosphere. On the rest of landfills gas was utilized by burning without energy recovery as well as with recovery. In 2011 there was 73 244 thousand MJ of heat and about 249 178 thousand kWh of electricity recovered from landfill gas. Growing number of illegal landfills is still a big problem for waste management in Poland. At the end of 2011 there were 2539 existing illegal landfills. This makes 35% less illegal landfills than in the previous year.

At the end of 2011 about 75% of existing illegal landfills were located in rural areas and 25% in cities. In 2010 it was respectively 55% and 45%. Comparing to 2010 the number of illegal landfills in cities decreased by 64,2% and in rural areas decreased by 10,2%.

During 2011 13202 illegal landfills were liquidated, out of which 85,5% in cities and 14,5% in rural areas. In comparison to the previous year the number of liquidated illegal landfills increased by 36% (in cities increased by 45,3% and in rural areas decreased by 0,2%). During liquidation 53 thousand tons of waste was collected, out of which 81% in cities and the rest 19% in rural areas.

Source: Polish Statistical Office ( [http://www.stat.gov.pl/gus/5840\\_1523\\_PLK\\_HTML.htm](http://www.stat.gov.pl/gus/5840_1523_PLK_HTML.htm) )

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## **Waste more expensive by 300% ?**

Within three years, collection of waste in residential areas can become more expensive by about 200 to 300 percent. Local authorities responsible for waste management, will gradually increase recycling, which is more expensive than landfilling. That will result into a price increase for waste collection– we read in "Rzeczpospolita" newspaper.

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The largest increase- about 300-percent- can be expected by residents of multi-family homes. At a slightly lower increase in the cost of waste disposal can count residents of single-family homes. Fees will be lower for segregated waste and higher for non-segregated waste.

According to the Ministry of the Environment it is not always clear how the fees for waste collection will develop, as the amount will vary by region - writes "Rzeczpospolita".

Source: Rzeczpospolita, 9/11/2012

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## **NCoC: Incineration and sorting plants needed in Poland**

In Poland there is lack of waste installations other than waste disposal facilities, for instance incineration plants, states the experts from the National Chamber of Commerce (NCoC). The Ministry of Environment is aware about the problem and announces that the situation will improve in the coming years.

Chairman of the Environment Committee in NCoC Mr. Kawczynski said during press conference that the amount of non-sorted municipal waste going to the landfill should be significantly reduced in the coming years. This improvement would be the result of new law concerning waste management. „However the use of waste must grow both in recycling and recovery" - he stressed.

According to experts from the National Chamber of Commerce energy recovery from municipal waste should increase as well. They highlighted that it will be particularly important for the development of efficient waste management system in Poland. According to them, the program of large installations development such as waste incineration plants has not been carried out yet.

As pointed by the President of the Association for the Promotion of Alternative Fuels prof. Andrzej Jasinski, "we cannot avoid waste incineration (...) but we do not have installations to burn waste."

Under the new "Act on maintaining cleanliness in communities from July 2013" municipalities will take over full responsibility for the collection, processing, and waste segregation. They will also need to gradually reduce the amount of landfilled waste. The waste that cannot be recycled will be burned to provide energy or alternative fuels.

Specialist from the department of waste management in the Ministry of Environment Ms. Sklarzewska Monika admits that the Ministry sees the problem. "The main method of waste disposal is still landfilling, but we hope that this will soon change" - she said. She informed that, according to the Ministry by 2015 six new municipal waste incineration plants are expected to be built, for instance in Krakow and Poznan. Currently in Poland only one incineration plant is in operation, in Warsaw.

Sklarzewska added that in the coming years a network of plants for mechanical and biological treatment of municipal solid waste will be well-developed. Their number will grow from the current 11 up to 70 plants.

According to the Polish Statistical Office data in 2010 over 10 million tons of municipal waste was collected, of which about 70 percent was generated in households. This gives an average of about 250 kg per capita per year, which is one of the lowest averages in the EU. More than 8,5 million tons of waste were stored at 699 municipal landfills.

Minister of the Environment issued in May a regulation on the levels of recycling, preparation for re-use and recovery by other methods of municipal waste fractions.

Regulation comes in response to the EU directive, which requires Poland to reach, by 31 December 2020, levels of recycling and preparation for re-use: 50 percent - paper, metals, plastics, glass; 70 percent - construction and demolition waste.

Source: PAP 14-11-2012, <http://www.portalsamorzadowy.pl/gospodarka-komunalna/>

## **0,36 billion EUR for incineration plant in Poznan**

Three companies have submitted offers in the tender for the construction and operation of incineration line and disposal line for large waste, together with the city of Poznan.

The full name of this investment is "Waste Management System for the City of Poznan. Contract 1". The investment cost is estimated at 0,36 billion EUR, of which 84 million EUR is a grant from the EU.

Initially 11 companies took part in the contest, of which the city chose five in September 2011. Three of them made the final offer: "Sita Green Energy" together with French company Suez, "IPTOK Poznan" with the German company EON, "Articulus sp z oo" with British company Wheelabrator.

According to the rules of the competition the winner will be the company that offers the lowest price for incineration services for end users.

The entire investment will be completed in 2015. It will be able to treat 240 thousand tons of waste per year. The project consists of installation for thermal treatment of municipal waste and installation for removing bulky waste.

The project will be implemented by using a hybrid model of public-private partnership (PPP), which combines the use of private capital and funds borrowed from the European Union. The owner of the incineration plant will be the city, and the private partner will operate it for 30-35 years.

The goal of the investment is maintenance and organization of municipal waste management in Poznan.

Source: PAP 15-11-2012, <http://www.portalsamorzadowy.pl/gospodarka-komunalna/prawie-1-5-mld-na-poznanska-spalarnie,41084.html>

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## **Revolution in waste management system will eliminate many waste companies from the Polish market**

The new system will eliminate at least 2 thousand waste companies from the market and will be more expensive for citizens- we read in Puls Biznesu, a daily business newspaper.

From 1 July 2013, the municipality will take over the management of municipal waste. They will announce tenders, which will lead to the selection on the market - writes "Puls Biznesu". According to experts of the National Chamber of Commerce in Poland there are about 3-4 thousand companies specialized in waste collection. Only 500 of them will stay on the market.

Except commercial companies many municipal entities may be also eliminated from the market. Puls Biznesu pays attention that the new waste management system will be also harmful for residents' pockets. The average annual cost per capita will be 180 PLN (app.43 EUR), which gives 15 PLN per month (3,60 EURO/month) .

Source: Puls Biznesu 02-11-2012

## Proposed changes bad for windmills

According to the PwC report "Analysis of the impact of proposed changes in the system of support for wind energy in Poland" the new regulation prepared by the Ministry of Economy will have bad impact on the wind industry.

According to PwC, investments in windmills will no longer be profitable. Until recently the government wanted wind energy to become a major renewable energy source by 2020. Thanks to wind energy Poland was supposed to achieve the EU objective, which is to produce at least 15 percent of energy from non-conventional sources. Today, these guidelines have become questionable.

Number of licensed sources of energy in Poland (status as of 30 September 2010): 136 biogas power plants, 16 biomass power plants, 2 solar generators, 378 wind power plants, 737 water power plants, 440 power plants using co-combustion technology.

Source: "Wind energy in Poland", Polish Wind Energy Association (<http://www.psew.pl/en>):

It is forecasted that dynamic in wind energy growth will fall down. Today, 90 percent of new renewable energy capacity comes from wind turbines. The proposed law on renewable energy sources change basis of previous plan for capacity increase from renewable energy sources. This means that investors will build less wind farms than expected- says Mr. Grzegorz Skarzynski from Polish Wind Energy Association.

According to PwC investments in wind energy will no longer be profitable, if parliament adopts law on renewable energy sources (RES) as proposed by the government last month. This project introduces a number of changes in the support of renewable energy, which will be unprofitable to the wind farms constructed on land.

Experts pay attention to the fact that the new rules limit the support period and reduce the number of certificates awarded per 1 MWh without a transition period for projects in progress. Introduction of all these changes at once can significantly slow down the development of wind energy. Moreover, it may hinder the realization of the national target for the share of RES in gross final energy consumption.

When solutions proposed by the bill come into force, profitable projects suddenly become unprofitable. This could refer to even 95 percent of investments. Following it will drastically lead to decrease in number of new constructions –pointed Gregory Skarzynski.

Investors problems would also translated to the local situation. Municipalities gain currently 30 thousand EUR per year per windmill (2 % value of buildings).

In the "National Action Plan for energy from renewable sources", published in 2010, the government set up more than 6-fold increase in the production of energy by wind turbines in the years 2010-2020.

This means that in 2020, wind energy shall be major renewable energy source. As investors alarm, this requires ensuring adequate support for wind power in the long-term period.

The solution of the problem with wind energy would be modification of the current bill on renewable energy sources.

Source: [newseria.pl](http://newseria.pl)

## Projects, Tenders

Tender "Supply of brand new slow-speed shredders (operating leases). The cheapest offer will be accepted. Offers can be submitted till: 07.12.2012

More information: <http://bip.marszow.pl/zamowienia>; e-mail: [zzo@marszow.pl](mailto:zzo@marszow.pl); tel. +48 (68) 479-46-26; fax +48 (68) 479-46-36

State of the art line for electro waste recycling was established in Bolecin, Poland. Construction of the recycling plant for refrigeration and household equipment and household costed about 6,3 million EUR.

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## Agenda

### **Workshop "White certificates according to the new executive regulation"**

Warsaw, 5th December 2012

Scope: Identification, scope of obligation and exceptions in accordance to particular units and particular cases, the list and the types of entities and projects that can take advantage of the new system of white certificates, information on the competitiveness of various energy-saving technologies, tender procedures, the system of flow and the issue of white certificates, mandatory penalties etc.

More information: <http://cbepolska.pl/en/contact.html>

### **Workshop "The new energy law and introducing legislation. Changes in the functioning of the market."**

Warsaw, 6<sup>th</sup> December 2012

Scope: At the workshop a new law will be discussed. The workshop is dedicated for investors, companies from OZE sector, gas providers and distributors, developers, public institutions, etc.

More information: <http://cbepolska.pl/en/szkolenie-nowe-prawo-energetyczne-i-ustawa-wprowadzajaca.html>

### **Economic Forum „Energy and Environment“**

Warsaw, 11<sup>th</sup> December 2012

Scope: Subject of the VI Economic Forum is directly related to environmental issues, energy and conventional and unconventional social responsibility. Panel sessions are planned for groups interested in a particular subject and allow bidirectional exchange of views and experiences.

More information: <http://www.eis.org.pl/vi-forum>

### **Seminar "Photovoltaic – future and investment in the industry in light of the new law on renewable energy"**

Warsaw, 13<sup>th</sup> December 2012

Scope: During the seminar participants will gain information about photovoltaic in the light of the new law.

More information: <http://scc.com.pl/konferencje/en/pv/zaproszenie>

## Colophon

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NL Agency is dealing with implementing government policy on the themes of Sustainability, Innovation and International.

EUNITE advises and supports companies doing business in Central Eastern Europe.



## Agenda (continuation)

### VIII International Conference Power Ring 2012 – European Regional Market and III energy pack

Warsaw, 13<sup>th</sup> December 2012

Scope: EU energy policy - and in particular, the new rules for shale gas extraction, support for cross-price formulas for imported fuel; directions of development of the European energy market; Polish policy on low-carbon investments and the National Investment Plan; the role of the construction sector in the development of a low carbon economy.

More information: <http://www.pw.edu.pl/Badania-i-nauka/Konferencje/2012/Konferencja-VIII-Miedzynarodowa-Konferencja-Power-Ring-2012-Europejski-Rynek-Regionalny-i-III-pakiet-energetyczny>

### 2nd International Forum of Waste Management in Poland "SOSEXPO 2013"

Warsaw, 20-21 March 2013

Scope: waste management systems, waste volume reduction, waste screening systems, systems of recognizing and separating the different materials, sorting of waste for further processing, separation of waste miscible, modern equipment for the transport and storage of waste, innovative software, hardware and equipment for maintains, design, construction and modernization of facilities, recycling, recovery, environmental protection and other important topics for the sector. Invited specialists and experts will present solutions for the new form of operation in the waste management division in Poland and also will emphasis on selective collection, sorting and recycling of waste.

More information: <http://www.sosexpo.ztw.pl/en>

### Workshop "Gas- New regulations for 2013"

Warsaw, 6<sup>th</sup> December 2012

Scope: Gas Law of 09.10.2012 r - the most important provisions and changes; charging gas prices and market liberalization; excise duty on gas - the legal and economic implications for industry; create a stock exchange of the gas market in Poland, virtual trade in natural gas; analysis of the impact of new legislation on energy market etc.

More information: <http://cbepolska.pl/en/gaz-nowe-regulacje-na-2013-rok.html>