2026-01-27 – Minutes Municipal Waste TF – 1st Meeting Drafting Team

Participants

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- Petros Nikolau, RAAEY, Greece
- Giovanni Taglialatela, ARERA, Italy
- Antal Andras, MEKH, Hungary
- David Horvath, MEKH, Hungary
- Tamas Voros, MEKH, Hungary
- Inara Teibe, PUC, Latvia
- Matas Taparauskas, VERT, Lithuania
- Claudia Videira, ERSAR, Portugal
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- Diogo Rosa, ERSAR, Portugal
- Vittorio Graziano, WAREG

Recap and context (Giovanni Taglialatela – ARERA, Italy – GT)

GT recalled that the Drafting Team work follows up on the exchange with the European Commission during the 3 December 2025 meeting, and WAREG's earlier policy proposals submitted in the context of the Circular Economy Act (CEA) consultation.

GT stated that the Commission is now seeking practical, implementable inputs, and specifically requested concrete examples and figures demonstrating:

- regulators' contribution to efficiency/effectiveness in municipal waste (MW) systems
- options to improve the efficiency of EPR schemes.

GT clarified that WAREG's previously agreed proposals remain valid; the present exercise is about providing evidence and operational examples to strengthen the Commission's drafting work.

1. Regulators' contribution to MW system efficiency - main points discussed

Scope of monitoring: beyond separate collection only

ERSAR (Portugal) suggested that the Drafting Team should avoid focusing exclusively on "separate collection costs" and instead recommend a broader approach: monitoring and reporting for the entire waste management service, because in many countries the same operators provide both mixed/residual waste and separate collection/sorting.

ERSAR noted that, in practice, activity cost-separation criteria are often difficult to define uniformly at operator level. A realistic stepping stone would be to require operators to report a detailed set of standardised activities (costs, outputs, and operational indicators), which could work across different Member State institutional models and, over time, support stronger/clearer regulatory powers.

2. Need for evidence ("figures") to support claims of efficiency gains

GT stressed that the Commission's request is essentially: "show us that regulators improve efficiency, with measurable effects." The challenge is that waste regulation is relatively recent in many jurisdictions, so long historical series are limited, but credible early evidence exists and should be consolidated and presented.

3. Country examples and evidence (as discussed)

1. Portugal (ERSAR) investment control and output leverage
   ERSAR explained that on separate collection/sorting, recent developments increased the overall revenue allocated to those activities (with impacts on EPR charges). However, ERSAR indicated stronger "good news" evidence exists for the overall MW system:
   - average 30–40% reduction in investment plans (CAPEX) proposed by operators (following regulatory scrutiny)
   - 7–10% increase in outputs for the given cost level, referencing the last two regulatory periods (approx. six years).

2. Italy (ARERA) transparency, cost control, tariff dynamics
   GT described the main regulatory contribution as ex-ante cost control and transparency: since regulation was introduced, users can understand what is being paid for (investment, operations, sorting improvements), and the regulator can challenge and moderate operators' cost and tariff expectations.

   GT added that inflationary effects may still require tariff revisions over time; the core message for the Commission is governance and cost discipline (controlling cost trajectories, not simply "raising" or "lowering" tariffs).

   Following a question on whether the chart data are available in a database, GT clarified that the graph was compiled using official databases (including ISPRA and ISTAT), combining multiple sources.

4. EPR efficiency discussion points

The group reiterated the relevance of WAREG's earlier convergence on minimum EU-wide transparency/data obligations as a feasible entry point for improving EPR governance and comparability.

Additional points raised in the exchange included:

- the importance of addressing quality disputes between municipalities and recyclers (material characterisation/quality criteria), and that EU-level work appears to be moving on this front;
- the need to pursue measures that stabilise and strengthen EU recycling markets, including via traceability along the value chain (linked to upcoming obligations under packaging rules, as mentioned);
- recognition that some instruments (e.g., taxation) are politically sensitive at EU level, so proposals should remain implementable and proportionate.

5. Members' interventions

5.1 Hungary (MEKH)

MEKH confirmed it will contribute mainly in a reactive mode (reviewing/commenting) given sensitivities and internal alignment needs. MEKH supported the approach of sharing the final package as an informal contribution.

5.2 Latvia (NERC)

NERC proposed to compile/update a structured overview of EPR/PRO models across countries (e.g., public/private, monopoly/competition, regulated/non-regulated, profit/non-profit) and, where possible, connect this to indicators of effectiveness (waste managed/collected for recycling) and cost information (fees/costs). Latvia noted it can provide figures on the deposit system, and that mixed vs separated collection cost figures for recent years are available.

5.3 Greece (RAAEY)

RAAEY indicated initial availability for the next meeting, subject to internal confirmation (management availability).

6. Working method and output format

GT proposed converting the presentation into an editable document to allow Members to add, delete, or flag elements, enabling quicker convergence on shared wording. It was agreed that the deliverable should be sent to the Commission contact as an informal contribution package (rather than a formal TF position), to keep flexibility and reduce procedural constraints.

7. Decisions and next steps

Output format: proceed with an informal contribution package to the Commission contact (Florian).

Evidence gathering:

- ERSAR to prepare a short note consolidating the Portuguese efficiency figures (investment control and output leverage).
- GT to circulate the Italian data references and the Excel compilation used for the chart(s).
- NERC to prepare an overview of EPR/PRO models and provide available deposit-system and cost/effectiveness figures.
- Next meeting: agreed in principle for Tuesday 3 February 2026, same time as the current meeting, subject to final confirmations; flexibility to adjust if needed.