



Challenges for Organising and Collective Bargaining in Care, Administration and Waste collection sectors in Central and Eastern European Countries

Hungary: Waste Management Sector

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1. Methodological preface

This report maps the Hungarian waste management sector and focuses on its structure, employment relations, and social dialogue. It is based on desk research and key findings from previous research on Hungarian waste management.

2. General characteristics of the sector

The statistics on Hungarian waste management reveal contradictions. Although the country excels in recycling, with nearly 70% of its total waste production is recycled (refer to Table 1), the European Environmental Agency indicates that Hungary, located in Central and Eastern Europe, faces challenges in achieving the 2025 recycling targets for municipal and packaging waste. In 2022, only 32% of municipal waste was recycled (KSH, 2024b; EEA, 2023).

Table 1: Quantity of each waste type by treatment method (thousands of tonnes)

	2017	2018	2019	2020	2021	2022
Material recycling	10 366	11 112	12 313	13 537	14 054	14 347
Energetically utilized	1 617	1 363	1 045	1 079	1 137	1 014
Combustion, without energy recovery	70	76	92	142	114	95
Disposed of by landfilling	5 445	5 049	5 310	4 954	4 926	4 802
Other disposal	376	633	298	442	269	173
Total	17 874	18 233	19 057	20 154	20 500	20 431

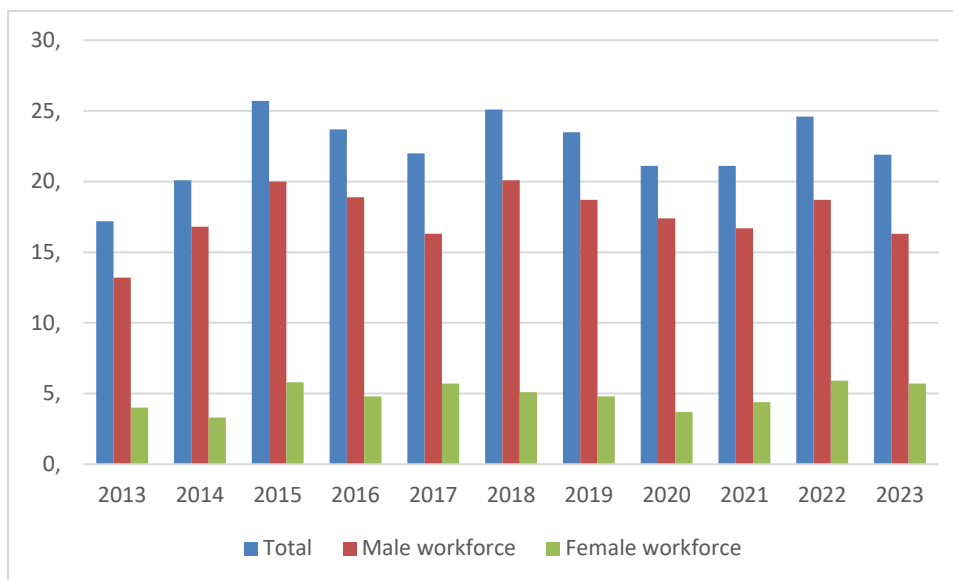
Source: KSH, 2024b

Detailed statistics on employment in Hungary's waste management sector are not publicly accessible. Data from the Hungarian Central Statistical Office (KSH) indicates that in 2023, about 47,200 individuals were employed in the NACE E sector (Water supply, sewerage, waste management and remediation activities), with the majority being male (33,600). This sector accounts for less than 1% of total employment in the country (KSH, 2024). The

EurObserv'ER online database provides the only dataset specifically addressing employment in particular areas of Renewable Energy Sources (RES). Their records reveal that in 2022, around 400 direct and indirect job opportunities were identified in the Renewable municipal waste sector (EurObserv'ER, 2024). Additionally, another Hungarian source reports that nearly 2,500 firms were operational in the waste management sector before 2023, employing approximately 21,000 people (Bucsky, 2023). This number is also supported by the Eurostat database, according to which, in 2023, the Waste Collection NACE group employed 21,900 employees. Since 2014, the workforce data indicates a relatively stable employment level, with numbers fluctuating between 20,000 and 25,000 individuals. Notably, more than 60% of this workforce is male. The age distribution reveals a significant presence of younger workers, particularly those aged 25 to 49, who number approximately 13,100. Additionally, the older age group, comprising workers aged 50 to 64, is also substantial, with around 8,100 individuals (Eurostat, 2024, as illustrated in Figure 1).

In 2021, the top 25 companies accounted for 46% of the total revenue. Among these companies, 14 were publicly or state-owned, while the remainder were private, with all but one being foreign-owned (Bucsky, 2023).

Figure 1: Employment by sex in the Waste collection, treatment and disposal activities, materials recovery sector (by thousands)



Source: Eurostat, 2024 (database: lfsa_egan22d)

The legislative framework governing waste management is established by Act CLXXXV of 2012 concerning waste, Act V of 2013 pertaining to the Civil Code, Act CLXXXIX of 2011 regarding Local Governments in Hungary, and Act LIII of 1995 which outlines the General Rules for the Protection of the Environment. Following a comprehensive analysis, it can be asserted that no specific legislation addressing employment and labour standards exists within the waste management context, indicating that the applicable legislation remains the Labour Code enacted in 2012 (netjogtar.hu, 2024; Kiss, Balla, Mester, & Fazekas, 2018).

Defining the actual legislative and regulatory framework is complex. This complexity arose from the government's overhaul of the national waste management system over the decade. This procedure started in 2011 with the transformation of the entire waste management system, for example with the nationalisation of the residential waste. In 2015, the NHKV Zrt. was established as a state-owned coordinating and asset management company responsible for the management and coordination of the waste management system (NHKV, 2024). As a result of this transition, the foreign-owned companies ended their activity in Hungary and were replaced by municipal non-profit entities, while the industrial waste remained in the competence of more than 750 SME companies (Glosszár, 2020).

The management of the waste management system was heavily criticised and is still criticised by experts present in the field. For example, in 2018, the Ombudsman also, in one of its documents, addressed the challenges of the waste management system. According to his document one of the main problems is also the frequency of the amendments provided in the regulatory framework of the waste management system, which reached over 400 changes in the law. This, according to his statement, might cause legal inconsistencies and has an impact also on the sufficiency of waste management in Hungary. Financial issue was also highlighted in the report, because the service fees paid by citizens do not cover the actual costs of the companies dealing with the waste collecting. The document concluded that Hungary's waste management system requires a cohesive regulatory framework that promotes waste reduction, ensures the financial sustainability of service providers, and fulfils environmental protection goals. This development caused the nationalisation effort of the government to become a failure, and the government moved towards alternatives for dealing with the issues related to waste management. The result was the introduction of the so-called waste concession system (Wiedermann, 2023; ajbh.hu, 2018). The goal of this transformation was to align the system with the needs and standards of the circular economy model in Hungary. As of July 1, 2023, a

waste management concession is in effect, which designates a single licensor responsible for the collection and pre-treatment of municipal waste. The concession agreement lasts for 35 years, extending until 2058, and the responsibility for waste management lies with a new subsidiary of the Hungarian multinational gas and oil company, MOL (hvg.hu, 2022).

The MOHU company has taken charge of the new centralized waste management system, replacing the previously fragmented approach provided by both governmental and municipal bodies. As indicated in the MOL Group presentation, MOHU has supplanted an operation reliant on 26 independent providers, aiming to enhance the efficiency of the waste management system (MOLGroup, 2022). However, this transformation has faced challenges. Waste management organizations in Hungary are resisting MOL's newfound market dominance. Professional associations allege that MOL failed to secure essential permits on time, which could jeopardize their 35-year waste management concession, and have escalated the matter to the Economic Competition Office. Over 3,000 SMEs in Hungary's waste management sector are anxious about their futures as they transition to being subcontractors for MOHU, MOL's waste management branch. They express concerns regarding payment rates and the sustainability of their businesses. Legal complications have emerged, as MOL and MOHU are accused of not obtaining necessary environmental permits and capacity agreements by the established deadline. Transparency International has asked for these documents but has yet to receive them, raising suspicions of irregularities. MOL's strategy to enter the waste management market aims to recover losses from residential waste management by tapping into the more lucrative industrial waste sector. Existing companies are apprehensive about their financial viability and commitments to investments. MOL has pledged substantial investments, including establishing a new facility to process municipal solid waste and enhance recycling rates. By 2040, they aim to decrease landfill waste from 50% to 10% and boost recycling rates from 32% to 65%. Despite calls to adjust the concession to exclude for-profit entities, government responses have been vague, leaving many uncertainties about the future of Hungary's waste management landscape (Wiedermann, 2023).

Meanwhile, the role of the NHKV Zrt. has also changed since 2023. The introduction of the concession-based model significantly altered the company's role, expanding its responsibilities to include oversight, expertise, and support for concession companies, while also maintaining certain tasks from the previous public service system (e.g. financial tasks, billing, waste management assets, etc.) (NHKV, 2024).

3. Major problems and challenges in the sector

According to Cseh (2024), local governments encounter numerous challenges in sustaining public services and utilities, highlighting that these responsibilities have increasingly strained their budgets. Since 2010, particularly from 2012 onwards, local government funding and regulatory frameworks have drastically changed due to inadequate local resources. A prominent issue discussed in the paper is the struggle to enhance the quality of public services provided by municipally owned enterprises, such as waste management, which is complicated by a blend of administrative and private law factors. The COVID-19 pandemic intensified these challenges, especially for the labour-intensive waste management sector, where worker absences necessitated economic and organizational reconfigurations. The text references legislative changes, particularly the 2021 Act II and Government Decree 675/2023, which significantly reshaped the powers and responsibilities of local governments regarding waste management. Starting July 1, 2023, municipalities must engage concession companies or their subcontractors to resolve issues in waste management services and report any unresolved matters to the Minister of Construction and Transport. While the article does not present arguments for or against waste management reorganization, it aims to outline the fundamental causal connections. It draws a parallel between the restructuring of waste management and that of healthcare services, motivated by similar economic and funding challenges.

4. Characteristics of social dialogue organisations in the sector

Information regarding the current organizations involved in social dialogue is quite limited. On the employee's side, the active trade union is the HVDSZ 2000 (Local Industry and Urban Economy Workers' Union 2000), which stands as the largest national and sectoral trade union in the waste management sector (szakszervezetek.hu, 2023; hvdsz2000.eu, 2024).

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 – Sectoral Social Dialogue Committee). For the waste management sector is present the Sectoral Social Dialogue Committee on Urban Services (Településszolgáltatási Ágazati Párbeszéd). Here, as an official representant 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 (Településszolgáltatási Egyesület).

There is currently no literature or other sources available regarding the concrete role and strategies of the Sectoral Social Dialogue Committee. However, the original purpose for establishing this committee was to encourage social partners to negotiate sectoral collective agreements. The ÁPBs were established in 2004, and a total of 21 committees were created across different economic sectors (Matheika, Borbély & Krokovay, 2021). Currently, only 17 sectoral committees are operational, which falls significantly short of the initial expectations for activity at the sectoral level. This disparity can be attributed to the complex technical and legislative framework that governs the establishment and management of these committees. Furthermore, the ÁPBs were instituted by the government in a top-down approach, resulting in a lack of identification and commitment from social partners toward these committees. Consequently, since the inception of the ÁPBs, only a single sectoral agreement has been negotiated, and not all economic sectors have yet established these committees (Szabó, 2024: 34-35).

The waste management sector exemplifies the absence of sectoral collective bargaining. According to available information, the trade union engaged in discussions with the employer's organization regarding the formation of a sectoral collective agreement; however, this agreement has not been signed (Lupkovics & Borbély, 2014).

4.1. Challenges and good practices for organising employees

Deep and relevant research on the main characteristics of social partnerships and the involvement of social partners, as well as the concrete involvement of employees and employers, is missing in the context of the Hungarian waste management sector. As was stated in the previous chapter, in the social dialogue is present one main trade union (HVDSZ 2000) together with one employer organisation (Municipal Services Association). According to the available information, HVDSZ 2000 has approximately 10,000 members. However, it does not mean, that it represents one-half of the entire workforce active in the sector, because the trade union represents the interests of both municipal workers and workers with reduced working conditions, as well as the trade union defines itself as an „open and collecting union”, meaning that everyone who wants could join the union (Szakszervezetek.hu, 2017).

Challenges for organising employees could also be present in the context of valid labour law and legislation. According to the Hungarian legislation, more than one trade union could be present at one workplace or in one company, but when we are talking about collective bargaining, the fact is, that the

negotiation is possible only if all the active trade unions must participate in the negotiation and in case of success each of them is part of the final collective agreements. Trade unions are required to collaborate; however, divergent preferences or opinions regarding negotiations may jeopardize the efficacy of collective bargaining. A pertinent issue within this context pertains to working conditions and inadequate wages. 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 (Tenczer, 2022; RTL, 2022).

In 2014, a survey was conducted of the trade union representatives and the role of the trade union in collective bargaining. The survey found that the representatives expressed significant concerns about the challenges they face in collective bargaining, especially due to the restrictive legal framework established after the introduction of the new Labour Code in 2012. The discourse revealed a significant imbalance in power dynamics, wherein employers frequently possess the authority to unilaterally amend employment conditions, thus complicating negotiations. Participants underscored the necessity of sectoral-level dialogue and agreements to effectively address common challenges across various industries. They contended that sectoral agreements may provide enhanced stability and fairness compared to single-employer contracts. Nonetheless, they acknowledged the fragmentation present within the public sector and the constraints of government support, which hinder efforts to establish more comprehensive collective agreements. Trade union representatives highlighted the need for better training and resources to enhance their negotiation capacity. Limited access to these tools hinders their effectiveness in navigating legal frameworks. There was also frustration over the lack of engagement from employers and the government, which maintains centralized control over public sector negotiations, limiting unions' influence on employment conditions. Representatives promoted legal reforms to support fair collective bargaining practices. According to the

statements, the HVDSZ 2000 trade union actively communicates with its members, focusing on key priorities such as wage flexibility, job security, and training rights, particularly in municipal services. They emphasized the need for legal protections to ensure the enforceability of collective agreements and uphold workers' rights (HVDSZ2000, 2014).

5. Collective bargaining and other forms of social dialogue in the sector - characteristics

Currently, information regarding collective bargaining and the specific wording of collective agreements within the waste management sector is unavailable. Our findings suggest that sector-level collective bargaining does not exist in this industry, thereby confining negotiations to the company level. Trade unions have articulated significant concerns regarding the challenges posed by the restrictive legal frameworks of Hungarian labour law, which may result in an imbalance of power dynamics, particularly between employers and trade unions. This situation is further complicated by the representativeness criteria, which stipulate a 10% membership threshold, potentially impeding effective negotiations.

Despite multiple efforts by the trade union active in the waste management sector, sector-level collective bargaining has not yet been established. However, the HVDSZ 2000 trade union remains actively involved in negotiations. A salient example of this engagement is the 2022 strike at the Budapest-based FKF company. This dispute, which focused on wage discrepancies, culminated in an agreement achieved through the constructive participation of local social partners. This case underscores how enterprise-level negotiations can yield limited yet crucial financial benefits, despite the ongoing lack of resolution for broader sectoral concerns.

The Sectoral Social Dialogue Committee on Urban Services provides a formal platform for bipartite dialogue between the already mentioned trade union and the employer's organisation, represented by the Municipal Services Association. However, this Committee has had limited success in fostering sectoral agreements due to overly complicated technical and legislative frameworks necessary to reach sectoral collective agreements and due to a top-down approach applied during the creation of the Sectoral Committee, which has failed to resonate with social partners.

Works Councils could also be relevant actors in the context of the waste management sector. Veolia company, as a foreign-owned multinational

company, has established the European Works Council, which also has representative members from the Hungarian subsidiary (EPSU, 2005).

6. Conclusions and recommendations

The Hungarian waste management sector faces **significant challenges in fostering effective social dialogue and collective bargaining**. The **lack of sectoral collective agreements** limits the ability to address industry-wide issues such as wage disparities, job security, and occupational health and safety. While enterprise-level agreements offer localized solutions, they are insufficient for tackling broader systemic concerns. The restrictive legal framework, particularly the Labour Code of 2012, further exacerbates these issues by requiring unanimous trade union participation in negotiations, making the process cumbersome and reducing the scope of effective dialogue. Centralized government control over public sector negotiations also diminishes the influence of social partners. Sectoral Social Dialogue Committees, such as the Sectoral Social Dialogue Committee on Urban Services, have not reached their full potential. Structural barriers, such as overly complex legislative frameworks and limited engagement from both trade unions and employer organizations, hinder their effectiveness. Furthermore, Hungarian social partners have limited integration with European sectoral social dialogue, missing opportunities to leverage international best practices and support.

To address these challenges, several actions are recommended. **Strengthening sectoral-level dialogue and agreements** is essential. Simplifying the technical and legislative frameworks governing Sectoral Social Dialogue Committees would encourage broader participation and make processes more efficient. The **government should support** these efforts by providing funding and administrative resources. Legal reforms are also crucial, including reducing the requirement for unanimous trade union participation and establishing safeguards against unilateral changes to employment conditions by employers.

Building the capacity of social partners is another priority. Training and resources for trade unions and employer organizations can improve their negotiation skills and understanding of legal frameworks, enabling more effective bargaining. Additionally, **expanding participation in European sectoral social dialogue bodies**, such as the European Federation of Public Service Unions (EPSU), could bring valuable insights and resources to the Hungarian context.

Despite the challenges, opportunities exist to strengthen social dialogue in the waste management sector. Government support, cross-sector collaboration, increased alignment with European practices, and **worker mobilization** can create a more equitable and effective framework for collective bargaining and social dialogue. By addressing these issues, the sector can move towards greater stability, fairness, and inclusivity.

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