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Heterogeneity and conflict

The waste sector in Austria

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Introduction

The waste sector in Austria is heterogeneous in nearly all senses: We find public and private ownership, small regional and large multinational companies, parts and subsidiaries of companies, interdependent ownerships, and mixed funding of waste management services. The public sector still is a central actor both as provider and client of waste management services. Privatisation here is limited, most municipalities retain a controlling interest in waste disposal, and state-owned or partly state-owned utility companies also play a part. Types of competition are varied and dependent on the concrete situation. Generally, '[p]rivate companies continuously aim to cut the cost associated with the provision of services, to discover and develop lucrative areas of business, and spot areas that do not cover cost and either improve their revenue or reduce their extent. Of course, occasionally deficient services are continued, for example in order to remain in a promising market or to be able to offer a full service to clients' (Hutterer et al., 2009: 128, translation by the authors). The fragmented character of the market thus renders some cost obscurity and cross-subsidiarisation of services highly likely, regardless whether the actors involved are located in the public or private sector or hybrids of both.

As elsewhere, the development of the sector has been driven by legal regulation on both the national and increasingly the European level. A sector expert from the public sector context puts it this way, representing a general experts' narrative:

'In the 1980s, the picture was, here's the bin, that gets emptied into a truck, then brought to the waste site, tipped out, that's it, that's how it started. And nowadays, waste management is about management. You divide up these material flows and consider at the collection point what gets collected separately and so on, and then these flows go through particular treatment routines.'

This regulation has increasingly created and differentiated markets, business models and sector structures along the lines of types of waste, their recycling and reuse properties, their commercial potential and the strategies of actors in the field. Some municipal monopolies ('obligations to deliver' = Andienungspflichten) are being dissolved, but in Austria we see less a consistent privatisation trend than a proliferation of networked, multi-layered arrangements and divisions of labour that are not always transparent and often contingent upon regional or federal-state-specific configurations.

With regard to employment, the sector has expanded by half since 2000, but still, not all waste management functions and jobs are located in NACE 38. Experts agree that problematic working conditions concentrate in waste sorting, a generally unskilled labour-intensive production-line operation epitomising 'dirty' work done by diverse vulnerable groups with few labour market alternatives. For other jobs in the sector such as garbage collection they disagree with any notion of 'low-wage' work – but for the public sector refuse to name actual wage levels.

Employment figures for NACE 38 do not show an increasing diversity in the sector. It remains consistently male-dominated and native Austrians are not replaced by migrants

but retain or even increase their share in newly generated jobs. The complexity and non-transparency in the sector was to some extent reiterated in the research. Several interview partners from both the employer and labour side were somewhat uncomfortable with our request and mistrustful during the interviews, frequently wanting to know how we had come by some information or why we wanted to know something at points that to an outsider did not appear sensitive. With regard to labour issues this may be explicable since negotiations for a collective agreement are underway, but we had an overall distinct impression of actors in a field that likes to keep itself closed to outside observers.

1 Section 1: General background on the organisations and the interviewees

For this report, we interviewed nine stakeholder representatives. Since the sector and its companies are so heterogeneous, it has several unions representing it: PRO-GE, the manufacturing union, GdG, the union of municipal employees, Vida, the service sector union, and the white-collar union GPA-djp for the clerical and white-collar employees. Which union is present in a company often depends on that company's sectoral roots, and companies from logistics, energy, building or the chemical industry all have subsidies or branches in the waste sector. There is one employer association, the Association for Waste and Sewage Management (= Fachverband Abfall- und Abwasserwirtschaft) established in 2000 and incorporated into the Austrian Economic Chamber, hence with compulsory membership of private-sector companies. We interviewed two representatives of this association. Representatives of a different industry association and of an involved cities' association were unavailable for an interview. In addition, we talked to one representative each of the Chamber of Labour and of the Working Group of Austrian Municipal Waste Management Syndicates (=ARGE Österreichischer Abfallwirtschaftsverbände), which represents the waste management syndicates of smaller municipalities.

PRO-GE is the manufacturing union, the result of a merger in 2009 of the Metalworkers, Textile and Food Union (GMTN) and the Union of Chemical Workers. It negotiates some 140 collective agreements and has more than 250,000 members according to its website, thus being the largest blue-collar union in Austria (www.proge.at). The union of municipal employees (GdG) represents some 155,000 employees of municipalities. It merged with the union of culture, media, education and sports employees KMSfB in 2009. Organisationally, it operates like a company union with union secretaries and functionaries located in the respective municipalities with overlapping roles as works councillors. Its central organisation only has officers for issues such as collective agreements, legal matters, member service, finance, international affairs, IT and sports (!). Vida is the service and transport union which was established following the merger of the railway, hospitality and personal services, and retail and transport unions in 2006. It has some 155,000 members. It has three sections: transport, health, social and personal services, and private services in which the respective industries are further divided up in 'Bundesfachgruppen', and the Fachgruppen in 'committees' which roughly correspond to NACE 2-figure codes. Waste management is represented by a union secretary who

introduces himself as ‘the small union within the union’, being responsible for a whole range of scattered blue-collar occupations: employees of sports clubs, cemeteries, former holdings of the City of Vienna, petrol stations and waste. In addition to the expert interviews, this report is based on a range of reports on the industry by several research institutes published on behalf of the Ministry for Agriculture and the Environment, Chamber of Labour and others. These are mostly descriptive and emphasise sectoral structure, material flows and regulation, with little information available on work and employment.

2 Section 2: Economic and employment development in the sector

2.1 Regulation

The regulation of the sector is strongly interlinked with political, economic and environmental decisions and regulations. Moreover, regulation is situated in an area of tension and overlapping responsibilities between EU, national and local level (provinces and municipalities). Developments on the EU level stimulate those on the national level and vice versa, with Austria generally implementing European directives to a fairly high standard.

Generally, the waste sector is regulated by the national waste management law of 2002 and separate laws on the federal state level, which assign the responsibility for urban waste disposal to the municipalities. To handle this, municipalities form syndicates that handle procurement of waste services, collection and treatment of residual and bulky waste, and recycling of secondary materials. The syndicates also occasionally run their own treatment plants. However, there is considerable regional variation in systems of collection and waste treatment.

Since 1992 the ‘packaging directive’ (=Verpackungsverordnung) shifted the responsibility for collecting and recycling of packaging from municipalities to companies. It requires them to ensure free collection and recycling of packaging – which obviously is paid for through price premiums. This has been taken over by the Altstoff Recycling Austria (ARA), an organisation owned by an association of packaging manufacturers and retailers that represents all these groups and also the different types of packaging. In 2008 it collected some 774,000 tons of packaging and recycled 87% of it. Where new jobs emerged in this area, they are mainly unskilled, manual jobs.

Since 2004 the ‘landfill directive’ (=Deponieverordnung) prohibits the dumping of untreated or organic waste in landfills. This decreased the share of dumped urban waste from ca. 23% in 2003 to 3.7% in 2008. It also increased the share of incinerated urban waste from 28.3% in 2004 to 34.7% in 2008 (Germany Trade & Invest, 2010).

In sum, regulations in the sector have three major aspects, which can go hand in hand or contradict one another: environmental considerations, political and economic motives. Desirable and undesirable working conditions in the sector are mostly a side issue. While

the sector's shape is indeed dependent on political direction, workers' interests are a low priority. This may also apply to the current debate on 'green jobs' which mostly is interested in employment growth and skill development and somewhat disregards the quality of work or the extent to which jobs are merely shifted between sectors. An expert explains:

'That is, the relevance of the public sector is to be found in the rules: What has to happen? In providing the necessary resources in order to make something happen. And in the political decisions on who bears the costs for it.'

Experts, depending on their political and stakeholder affinities, disagree on the advantages and disadvantages of particular forms of regulations along predictable lines. Labour-oriented experts argue that the regulations that have been implemented all represent steps towards more politically intended privatization in the sector, which both employers and liberal/conservative political actors try to enhance. Employer- and conservative-oriented experts argue in favour of the market and regard obligations to deliver waste to the municipalities as overly expensive and non-transparent – which does not necessarily change with privatisation, especially considering the mixed ownership structures in the sector.

2.2 The market

The draft of the 2011 Federal Waste Management Plan (Lebensministerium, 2011) estimates that in 2008, the private sector part of waste management (including outsourced municipal companies) had a turnover of ca. EUR 4,000 million and employed some 25,000 people. The public sector's own part generated 1,000 million EUR and employed 6,000 workers. This is well above the sector's representation in labour statistics, where we only find 8,749 employees in 2009 (see chapter 4.1.1). The reason for this is that the NACE classification only covers a company's central economic activity, and a considerable part of waste management is located in other sectors such as construction, municipalities, utilities or transport (Weingärtler, 2009).

All primary waste in Austria in 2010 amounted to 51.72 million tonnes of which 3.9 million tonnes are household waste. In the big cities, household waste reached its peak in ca. 2003 with 600 kg per person and in 2007 was at slightly above 500 kg. The reason for that is the separate collection and recycling of paper, glass, metal and plastics, the recycling of cars and electric goods following the respective EU guidelines. During the economic crisis since 2009, prices for secondary materials have taken a dive, and manufacturing waste also decreased. With respect to some materials, especially metals, experts expect a recovery, but with regard to both incinerators and other treatment plants, Austria faces some excess capacity (Hutterer et al., 2009).

Waste management is funded in a mixed way: citizens pay municipal fees for residual waste and also for special services; manufacturers as originators of waste pay licensing fees to collective waste management systems (for example for packaging), which of course is included in their prices, secondary materials may generate sales revenues, and

municipalities may contribute extra funds from their budgets (Hutterer et al., 2009). The key change in the sector in this pattern of mixed funding during the last few decades was that waste became increasingly perceived as a commodity – but at the same time, political and environmental concerns gained weight. Both changes result in higher complexity with regard to different treatments of materials. In addition, prices for secondary materials are also somewhat volatile and likely to remain so.

Other changes were related to the virtual abolition of landfilling. This has furthered a concentration process in the private sector with larger companies pushing aside smaller ones, due to technical as well as financial resources. In the past, it was relevant whether a company had access to a landfill site. Now, access to incineration plants has become more important. As a consequence, smaller companies, many of which originate in the transportation sector, can hardly compete.

With regard to incineration, experts observe a kind of pork cycle. In 2004, the capacity of incinerators was low in Austria, while currently there is excess capacity – not resulting in lower prices. When the public sector tendered incineration services from 2004 onwards, mid- and long-term contracts were signed at higher prices due to the lack of capacity at the time. Meanwhile, many plants have extended their capacities, but municipalities are unable to make cost-saving use of the new competition due to the prevailing contracts. Waste incineration plants are mostly owned by energy providers which in turn are owned mostly by the respective federal countries. Sorting and chemical/physical waste treatment sites are mostly run by private waste management companies. There are ca. 850 waste management companies (including the municipally-owned companies) of which the majority are SMEs.

All observers, both sector reports and experts agree that while the private waste sector still has a large proportion of SMEs, there is an incremental concentration going on. The three largest private sector waste companies are Saubermacher, AVE and ASA. Styria-based Saubermacher is owned by the Roith family with a minority share held by Swiss bank UBS. It was established in 1980 and first concentrated on waste collection services for municipalities. Only later did it enter into waste sorting and treatment, and buying up the Rumpold company in 2006, intensified these activities that now also include treatment of hazardous waste. It also runs some public-private partnerships and is active in most South-East European countries, especially Hungary, Slovakia and the Czech Republic. The foreign subsidiaries have a share of some 60% of employees and 30% of turnover. Both AVE and ASA are connected with the public or state sector. AVE is a subsidiary of Energie AG Oberösterreich which is owned by the federal state for 51% and by a consortium of banks, utilities, Voestalpine steelworks and municipal companies. Its origins lie in a family-run firm, Kröpfel, which was bought up in the 1990s by the Energie AG's predecessor and RWE, a large German utility. AVE collects waste from some 2 million citizens and 130,000 industrial customers, and has subsidiaries in Hungary, the Czech Republic and Slovakia. A.S.A. was established by the Austrian state holding ÖIAG at the end of the 1980s, and eventually bought by a Spanish building company, FCC (=Construcciones y Contratas). It mostly serves industry customers, used to run several landfills and now runs treatment plants. It is also active in Eastern Europe, running public-

private partnerships on waste removal, sorting, treatment and disposal with municipalities which may also include street cleaning, snow removal and cemetery management (Hutterer et al., 2009).

Obviously, new products and patterns of consumption also play a part in shaping divisions of labour in waste treatment. An interviewee gives a striking example:

‘Especially in this society shaped by advertising, we’ve changed a lot. And in waste management, we have trouble because professionally, we don’t want that Nespresso system with the aluminium capsules, [but] now we do recycle them, that’s smart and well done, even if, with my green soul, I say, all right, but aluminium is way too valuable to use it for that, even if it gets collected separately and recycled, and everyone who collects it knows that and feels bad about it, but they do drink the coffee, don’t they. So there was this group of managers of waste management syndicates, and they all agree, no, we don’t do that. Three weeks later, 3, 4, 5 of them come back, and have been directed by their political bosses to implement it because the pressure is so high, now we have to collect Nespresso capsules separately. [...] So they must implement that [separate collection], and in Upper Austria, believe it or not, at the 180 recycling centres, in six months, they collected 41 tonnes, 41000 kilograms just of Nespresso capsules!’

Since 2009, capsules are brought from the recycling centre to the state-level waste logistics centre and from there to an Austrian company that separates out aluminium and coffee, Aluminium is recycled and coffee residues are composted.¹ The Nespresso company markets the concept as a sustainable company strategy under the trademark of ‘ecolaboration’ and offers coffee drinkers in all of Austria the possibility to return used capsules to its coffee ‘boutiques’, feeding them into the collection system.

2.3 Internationalisation

Compared to other European countries, particularly those in the South and East, Austria has rather strict regulations in the waste sector and apparently comparatively good working conditions in waste collection. Some experts see the high waste management standards in Austria due to Austria’s status as a tourism country in which the cleanliness of public spaces is prized. On the one hand, a high standard is thus visible, on the other, it presents stronger incentives to cut corners and save cost by exporting waste to countries with lower costs and standards. An interviewee sees demand for a reduction of internationalization by the public actors in this context because landfill prices vary substantially. For example, in Austrian municipalities the price for one ton of waste that is to be deposited is EUR 160. In Eastern European neighbouring countries such as Hungary and Slovakia, the prices are much lower with EUR 17 to 25. The Ministry in charge exerts controls, but in Schengen countries, controls are difficult to carry out. Therefore, some waste still goes abroad despite the prohibitions. According to the expert

¹ [http://www.umweltprofis.at/en/local-authorities/braunau/aktuelles/detail/datum//12/18/n Nespresso-kapsel-sammlung.html?tx_ttnews\[year\]=2009&cHash=c436f4564bd4535da12289a257008d58](http://www.umweltprofis.at/en/local-authorities/braunau/aktuelles/detail/datum//12/18/n Nespresso-kapsel-sammlung.html?tx_ttnews[year]=2009&cHash=c436f4564bd4535da12289a257008d58)

interview, neither the price nor the quality of waste disposal in Eastern European countries is likely to adapt in the near future.

As a rule, it is legal to transport safe secondary materials abroad, but not hazardous ones. With few exceptions, it is prohibited to deposit waste across state borders. Here, too, EU regulations as well as (even stricter) Austrian regulations are at place. However, there are exceptions and grey areas, as several interview partners tell us. In the case of incineration with exhaust air treatment, hazardous residues are (legally) brought to Germany, as there are no appropriate disposal sites in Austria.

As for the 'other side' of internationalization, companies from the Austrian waste sector have expanded to the NMS in the past 15 years or so. Indeed, the large players dominate the waste sectors in Eastern European countries, such as the Czech Republic, Slovakia, Hungary, Romania, Bulgaria, Serbia and Croatia. Usually, companies in those countries have been bought up or newly established which are owned by Austrian companies in group holdings.

2.4 Outsourcing, privatization and public procurement

With the multiplying paths of waste management due to changes in markets, regulations, technologies and products, outsourcing from the public sector and public procurement of services play an increasing part. There has not been a coherent move towards privatisation but more incremental changes on the level of municipalities, syndicates and federal states. Some larger municipalities have outsourced their waste management into municipality-owned companies and holdings that are formally located in the private sector. Others use tenders, form public-private partnerships or enter into different arrangements for different types of waste. Public procurement then is a contested area, influenced by local, national and EU regulations. Still, municipalities or their syndicates have alternatives in including quality and social criteria in tenders or aiming for the lowest price. Hence it is mainly them who would be able to implement improvements with regard to working conditions. On the other hand, public authorities tend to have less money at their disposal and need to cut cost. This pressure is transferred to the private contractors. Hence, there is not a consistent picture of quality criteria that are regularly included in tenders. Employer organisations point out the inclusion of social criteria while employee organisations see this happening too infrequently. Nevertheless, companies need to take an increasing number of competitive factors into account, including technical equipment, qualification, employees' wages etc. Contracts are usually over several years in duration, and if there is a change in the contractor structure, e.g. a new owner, usually the existing staff is transferred for the contract.

Contracts and collaborations are not always clear-cut. One interviewee mentions instances of 'sloppy public-private partnerships' in some places in which neither cost is saved nor are contractors monitored well. Not least, such constructions have an impact on cost transparency for private households. In general, waste collection charges are perceived as very non-transparent regardless of outsourcing, and interview partners from all sides assume that municipalities either use waste charges to subsidise other activities

or do not keep house well, also insufficiently monitoring private sector partners. Predictably though, employers' representatives assume that municipalities running their own waste management have higher charges than those with outsourced waste collection, and that their earnings act as hidden taxes. Accordingly, the representatives of private sector employers would favour an unrestrained liberal market-regulated system.

A political move towards privatisation is however somewhat blocked by the multiple responsibilities on the national, federal state and regional/local level, which leads to a well-known dilemma of federal systems. A sector expert says:

'Privatisation is always on the agenda. The [national] ministry contracts some studies and asks study authors if they couldn't establish a new limit on the obligations to deliver waste, to somehow compress that. But then in Austria, this is the exclusive responsibility of the federal states, so they scream and shout "that's us" and then the ministry can't do anything but say, all right, we're neutral. Even if the packaging directive is implemented in a silly way, and the competition isn't really working, so we [the ministry] neither dare shift that back to the municipalities nor move into the other direction [of massive privatisation]'.

An example for a persistently municipal waste collection is the city municipality of Vienna, a municipality which is also a federal state, traditionally governed by Social Democrats (recently in a coalition with the Green Party). Urban waste, and also street-cleaning and snow removal, are located in a separate department of the city administration ('Magistratsabteilung 48', MA 48). This also covers packaging, which in Vienna is chiefly incinerated and the energy fed into the city's district heating system. Employees' representatives perceive the current construction as favourable for the workers, as it is linked to public sector job security and clear-cut conditions with regard to the pay agreements. However, even in Vienna some small-scale outsourcing is in place. For peak periods, the city hires day labourers either from external companies or directly, e.g. for snow removal, which is also under the responsibility of MA 48. Overall, outsourcing in Vienna does not appear to be planned for the near future, but it is, of course, an issue. Furthermore, private companies are interested in doing business with the city, as it seems to be booming and very lucrative. Hitherto, however, from the point of view of Viennese experts, private companies in pilot projects have not been able to deliver the same quality as the current provider.

Other municipalities or their syndicates outsource waste management into companies that mostly are still owned by the municipality. There are some public-private-partnerships, but most cities or syndicates aim to keep full control. Other municipalities or their syndicates outsource waste management into companies that mostly are still owned by the municipality. In Linz or Salzburg, e.g., there are holdings or corporations owned by the city. There, with the lack of a collective agreement for the sector, decisions on pay and working conditions are made on the company level, without involvement of the city council. Outsourcing to municipality-owned companies means that workers are partly or wholly employed as private employees instead of public employees. Hence, with on-going restructuring, one and the same employer may have diverse employment relationships

with employees hired before restructuring employed by the municipality and the more recent hires under a private employment contract. This implies different wage patterns for the same kind of job, and sometimes more importantly, different levels of job protection. Both aspects make it difficult for the trade unions to act. According to a unionist, there are attempts to achieve harmonization by means of company agreements or extra-pay systems. For the employer, there is the advantage that private employees are not as difficult to dismiss as municipal employees.

2.5 Technology

Working conditions as well as technological changes are closely linked to the regulation of the sector and the technological changes in waste treatment as such. Historically, an important change started when the collection of waste paper was introduced. This was less motivated by environmental considerations than by economic ones (i.e. the fact that waste paper, if it was collected separately, could be sold to paper factories). This trend continued and was applied to ever more components of waste. In this context, an expert identifies a lot of manoeuvring space on the part of the responsible political actors. In national legislation and shaping of the waste sorting procedure, they are not completely determined by EU directives. Thus, much of the organization of waste and the accompanying working conditions is a matter of political and economic decisions. For example, the city of Vienna has restricted the separate collection of packaging to plastic bottles, which can largely be sorted automatically and physically recycled. Other packaging is collected together with other urban waste and incinerated. One of the reasons was that MA 48 was reluctant to extend its activities to manual sorting, a labour-intensive process notorious for problematic working conditions.

Experts on the one hand see massive technological improvements that also have impacts on the quality of work, others on the union side emphasise the remaining health and safety risks and the limitations of automation. In waste collecting, low-floor vehicles make it easier for waste collectors and drivers to step on and off the truck. Lifting and emptying of waste containers can be automated to some extent. This will, however, not make waste collectors redundant, as bins still need to be brought to the collection truck from basements, courtyards etc.

In sorting, health and safety has also improved: dust exposure has been reduced with the increased use of evacuation systems, and with overall automation. Experts describe sorting plants where much work on the conveyor belt is done by machines, e.g. electronic scrap where magnets and sensors are used and materials identified by infrared or x-ray. Automated pre-selection may also reduce risks of exposure to hazardous substances or sharp objects. Completely automated sorting, however, is not available in any area yet, and a remaining rest of tasks will always have to be done by intense manual work.

Finally, in waste treatment, regulations for dust emissions are rigorously followed. Incineration plants are controlled every 5 years and need to adapt to the new technical state of the art. This has positive effects for the workers too and is thus an example for a case where environmental protection and worker protection go hand in hand.

3 Section 3: The representation – looking back

3.1 The unions

Traditionally, a part of the sector was and still is very well organised. Municipal waste collectors in Vienna are reported to have a union density of 95%. Employees of utility companies that run incinerators or other waste treatment plants are covered by the collective agreement for utilities, also a favourable one. A PRO-GE representative describes his membership base as follows:

‘Mostly male and a considerable share of non-Austrian employees. That depends on what jobs people are doing. There is an association of skills required, responsibility, pay and the question where people doing that are coming from. Especially the less attractive jobs have an above-average proportion of foreign employees. The more demanding the job is, the more that changes’.

In the white-collar union, density in the sector is limited to clerical workers in larger companies and some engineers etc. in the knowledge-intensive high-tech parts of the sector. Small private-sector companies are often family-run and unlikely to organise.

3.2 Representation of vulnerable groups

Unions do not mention social vulnerability as an issue of interest representation in the sector much. Interest representation appears to be mostly contingent on the size of the company and its sectoral roots. For small companies it is chiefly non-existent. In addition, the unionised strongholds of the former public sector companies tend to have fewer migrant workers than those that were always located in the private sector. Hence, the representation of migrants is regarded as more of a general issue that unions are gradually approaching. The emphasis in addressing migrant issues appears to be more on those sectors where representation and issues are more homogeneous, such as retail.

Overall, the Austrian industrial relations system has had some limitations on the representation of migrants. Until 2004, only Austrians could be elected as works councillors (and as representatives in the Chamber of Labour), a rule that was rejected by the European Court of Law in 2004 and then abolished. Before, it did not just exclude non-nationals from taking an active role in interest representation, but also gave employers additional opportunities to hinder works council elections. Nevertheless, the issue was controversial in the unions. Unions in Austria have been traditionally oriented towards more exclusive labour markets, and are only becoming more universalist in recent years. Since works council elections are conducted by lists, fears were that elections could be complicated by national differences in addition to the political ones among Austrians.

4 Section 4: Current developments and estimates

4.1 Employment trends and restructuring processes

Employment in the waste sector

Data on employment in the waste sector have been gathered from national labour market statistics and the Austrian LFS which due to the distinct data sources are not compatible. Due to the implementation of the NACE 2008 classification, data from the LFS are only available since 2004. <http://www.dnet.at/bali> offers the employment data generated by the Austrian Central Association of social security agencies (=Hauptverband der Sozialversicherungsträger) for employees covered by social security.

As we noted in chapter 1, the NACE sector 38 only covers a part of the employment in waste, as many waste management operations take place in other sectors such as construction, transport, utilities or, for composting, agriculture. These figures thus represent the employment structure in companies whose main economic activity is waste management. The sector has grown by half since 2000. It is and remains strikingly male-dominated, with only a slight increase in the number of women employed to 23.5%. The share of non-Austrians in the sector is also small and has been decreasing – among men, from 20.6% in 2000 to 16.0% in 2009. Among women the share of non-Austrians went down from 14.8% to 9.4% in 2005, then up again to 12.3% in 2009. Hence, we are neither observing a feminisation nor an influx of migrants into this sector which is expanding. It is possible that, with the decrease of the number of other low-skilled jobs and also the decentralised, regional distribution of jobs in the sector, it continues to draw on a workforce of male Austrians with limited alternatives in the labour market.

Table 4.1: Employees in the waste sector, number of employees by gender, nationality and year

Ex	Nationality	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Men	Austrian	3537	3811	3978	4173	4490	4779	5296	5648	5707	5620
	EU15 without AUT	27	30	34	43	49	62	81	111	124	127
	EU12	96	101	103	100	113	117	122	137	156	158
	non-EU nationals	797	786	755	754	774	761	834	884	832	785
	All	4457	4728	4870	5070	5426	5719	6333	6780	6819	6690
	% EU nationals	2.8%	2.8%	2.8%	2.8%	3.0%	3.1%	3.2%	3.7%	4.1%	4.3%
	% non-EU nationals	17.9%	16.6%	15.5%	14.9%	14.3%	13.3%	13.2%	13.0%	12.2%	11.7%
	% all non-Austrians	20.6%	19.4%	18.3%	17.7%	17.3%	16.4%	16.4%	16.7%	16.3%	16.0%
	Index 2000=100	100	106	109	114	122	128	142	152	153	150
Women	Austrian	1023	1194	1261	1280	1332	1419	1565	1723	1789	1806
	EU15 without AUT	12	14	15	16	17	20	18	23	24	30
	EU12	11	8	10	10	12	17	21	25	32	28
	non-EU nationals	155	151	141	147	135	110	137	160	182	195
	All	1201	1367	1427	1453	1496	1566	1741	1931	2027	2059
	% EU nationals	1.9%	1.6%	1.8%	1.8%	1.9%	2.4%	2.2%	2.5%	2.8%	2.8%
	% non-EU nationals	12.9%	11.0%	9.9%	10.1%	9.0%	7.0%	7.9%	8.3%	9.0%	9.5%
	% all non-Austrians	14.8%	12.7%	11.6%	11.9%	11.0%	9.4%	10.1%	10.8%	11.7%	12.3%
	Index 2000=100	100	114	119	121	125	130	145	161	169	171
Men + women		5658	6095	6297	6523	6922	7285	8074	8711	8846	8749
% women		21.2%	22.4%	22.7%	22.3%	21.6%	21.5%	21.6%	22.2%	22.9%	23.5%
% non-Austrians		19.4%	17.9%	16.8%	16.4%	15.9%	14.9%	15.0%	15.4%	15.3%	15.1%

Source: Social security agencies, <http://www.dnet.at/bali>

Note: Employees in the waste management sector = ÖNACE E38.

Table 4.2: Development of employment in the subsectors

	2000	2008	Change
Collection of non-hazardous waste	2848	4299	50,9%
Collection of hazardous waste	98	156	59.2%
Disposal of non-hazardous waste	1479	2807	89.8%
Disposal of hazardous waste	186	240	29.0%
Recovery of sorted materials	1047	1344	28.4%

Among the subsectors (for detailed figures, see annex), the disposal of non-hazardous waste had the largest increase, by 89.8%. Here, women also notably increased their share of employment, from 22.4 to 28.3%. A disproportionate part of that job growth went to Austrians. The number of men's jobs in non-hazardous waste disposal peaked in 2006, whereas women still added jobs until 2008. Especially men from outside the EU lost jobs from 2007 onwards, whereas non-EU women increased their share in that period. This partly mirrors the expansion of garbage sorting with slight changes in employees' diversity. The recovery of sorted materials gained jobs below the average for the sectors. Job growth stopped in 2005, and both non-EU migrants – whose share had been declining since 2000 from 33.8% to 21.7% in 2009 – and women lost a disproportionate amount of jobs. Women, both Austrians and non-Austrians, recovered 'their' job losses since 2006, and so did male Austrians. Male migrants from outside the EU only recovered a quarter of their lost jobs. Nevertheless, experts report that some waste collection companies complain that they cannot hire Austrian workers for waste collection anymore since they would not accept the wages that are paid.

The use of the LFS for the waste sector is limited due to small cell sizes and correspondingly high sampling errors. However, the share of part-time work in the sector is below 20% and as we might expect, a female domain. Ca. 95% of men work full-time and half of women have part-time jobs.

Some employment in the waste sector is also generated by non-profit employment projects in all Austrian provinces, particularly with regard to the avoidance, re-use and recycling of waste. In Upper Austria, for instance, there is a network of projects, including maintenance and repair stations which collect and mend repairable goods and second-hand shops where the repaired objects are sold. One of the experts interviewed sees this combination of utilization of waste and social employment as an important future issue in the next five years or so.

4.2 Quality of work and job characteristics

Tasks, problems and improvements

A generic description of the process of waste disposal looks as follows: Household waste is collected with a garbage truck with a driver and two waste collectors. The waste collectors take the waste containers, move them to the truck and empty them. Thanks to technical devices, this task is not necessarily physically demanding. Usually, the containers are emptied by being moved into a device in the truck and by pressing a button. The truck then drives to the waste company, where the waste is temporarily stored and moved to a conveyor belt. Here, some pre-sorting is done, by sorting out plastic and other material. Even though recycling is practised in Austria, a lot of recyclable material is still to be found in residual waste.

Overall, the typical work strains include noise, dirt, partly fast-paced work, work outdoors (independent of the weather), lifting and carrying. The focus is thus on physical strain and a kind of strain summarized as 'inconvenience' by a unionist. Regarding the health risks in the sector, a unionist describes:

'Try and step on the conveyor belt. That's not only dirty, but also infectious. Try and run around on those premises! That's, although there's daily cleaning, there's always dust, let's call it dust for the moment, but partly infectious dust, where those people have to work. There is danger at the dumpsite by gas, thus ...'

In municipalities, another kind of job is working in waste collection centres. These are centres where people can bring their bulky or hazardous waste material; the submission is controlled by municipal employees. Usable goods may be redirected to the second-hand trade or refurbished. This work, too, is mainly done outdoors and often linked to dust and dirt exposure. While there were two or three deaths due to the exposure to dangerous substances in the beginning of the 1990s, there have not been any serious accidents afterwards. Measures that were implemented were trainings for workers, focussed on the clarification of risks, which the employers are now obliged to provide. Furthermore, workers wear protection clothes.

Since the beginning of the 1990s, when separate collection of some materials became common, there have been major improvements with regard to quality of work. The jobs that have developed are jobs in the area of collecting companies, particularly waste collectors standing in the back of the trucks. While, e.g., waste bags could be as heavy as 110 litres before, there are now regulations limiting the weight of bags to 25 kilograms. New regulations also concern standing on the boards at the back of the trucks, implying more security, and safety clothes for the workers. These improvements are due to national regulations as well as EU regulations (e.g. the maximum bag weight).

Working conditions are different for different jobs in the waste chain: Waste collectors and drivers are subject to the employment regulations, which have seen improvements over time. They have become tighter and more rigid, for instance with regard to the regulation of breaks which used to be a big issue. Poor working conditions occur both in the public

and in the private sector. However, there appears to be a stronger tendency to bad working conditions in private companies. In particular, the wage level tends to be considerably higher with public employers. Some experts expect a worsening of working conditions in general, wages in particular and also a worsening of service quality linked to further outsourcing. In sum, social partners agree that the main issues for the social partners are the 'bread and butter' issues of money, working time, and health. These are complemented by more individual issues, depending on the life phase and the kind of activity.

Good job perceptions

Experts agree that as a rule, people who work in the sector have not aimed to get there. Rather, jobs in the sector can be seen as options for people who would not get any other job, as the formal requirements (education, training, skills) are low.

An important exception is waste collection in a large Austrian municipality which is reported to be a job very much in demand. It is secure, compared to the private sector, the pension system is beneficial and the wages are rather high – although we failed to get actual figures from interviewees. The working time of 6 a.m. to 2.30 p.m. is perceived as attractive. In the last 20 years or so, there have been some improvements with regard to dust exposure, work clothes, hydraulic lifters, and modernized waste containers with lower weight. The new work clothes provide more security, workers have become more visible and recognised in the public space and there are now safety shoes for summer and winter respectively. All the clothes and equipment are provided by the employer, which, according to a municipality representative, is not always the case in private companies.

Another job that is perceived as a rather favourable one is composting of organic waste in the country, often done by farmers to supplement their income. Apart from the bad smell, there are no major risks or problems linked to this activity.

Finally, attractive jobs are those with very exclusive, sometimes very expensive specialised vehicles; they are perceived as interesting, are linked to good wage options, provide training opportunities and imply responsibility. Another group of well-paid and interesting jobs is that of skilled professionals, e.g. in maintenance or process plants, such as electricians, mechatronic specialists or chemical engineers.

Working hours

Depending on the kind of activity, all kinds of working hours can be found in the sector. Often, the working hours depend on external factors. To name some examples: People whose jobs correspond to the activity of a sorting plant may work shifts. In other cases, working hours depend on the waste collection tour that a specific team has to accomplish. Handling of working times is sometimes flexible (starting earlier, leaving earlier, leaving as soon as a tour is completed). In sorting plants, two shifts are usual, while 24-hours-shifts exist in the field of waste incineration plants. According to legal regulations there are supplements for overtime and night work. There are also company-specific agreements in organized companies that exceed the legally set conditions. The issue of working hours

and overtime payment is closely linked to collective bargaining agreements. The situation with regard to wages, overtime supplements and working times is very heterogeneous, and more generous or vague in some agreements than in others.

In some fields of activity, fluctuations of capacity are an issue. For one thing, this concerns winter services. For another, the frequency of waste collection is often lower in the winter, when there is less organic waste.

The case of an Austrian municipality can serve as an illustration for typical working hours: Here, waste collectors (one driver and two refuse collectors), work together. The tour is planned with a tour book, including Monday to Friday and, if there is a holiday in the week, Saturday, too (e.g., one day collection of residual waste, one day plastic waste, etc.). There are about 130 job-hoppers who compensate for vacations, sickness absence etc. Other employees work in fixed teams. There are also 6-days-tours generally including Saturdays, depending on the building and its requirements. Extra work, such as removing waste at public events, is scheduled into shift plans. Night work occurs in case of snow fall in the winter service.

Wages

Altogether, wages in the sector are very heterogeneous, with large differences between municipalities and private companies, among different municipalities, and with regard to the kind of job and the different collective bargaining agreements that apply. It is noteworthy that wages are an issue which is not very explicitly talked about across the whole sector.

This is particularly true for wages in Vienna, which are widely assumed to be rather high but not made transparent. Information ranges from the assumption that waste collectors in Vienna earn 'more than many academics' to the statement that wages are located in the upper third of wages for this activity, compared to other employers. Employees in the city of Vienna are contract staff of the city of Vienna, their income being regulated in the wage scheme for contract staff and civil servants,² which precisely lists qualifications and according wages. The lowest wages start at EUR 1.250/month. However, these wages are rarely paid since qualification plays a part in the wage brackets and people with very low education are not even hired for low-skill jobs. In addition, in the municipal sector in Austria, a substantial share of the total wage consists of supplements, which are distributed according to a very complicated, hardly comprehensible system. Typically, in the public sector, wages automatically increase every two years. Furthermore, there are yearly salary increases, which are subject to negotiations with the employer. According to a unionist, similar to other sectors, these salary increases in recent years have not fully compensated for increases in the cost of living. In municipalities, overtime is a contested issue in employees' representation. On the one hand, the workload is sometimes high and overtime hours bring a higher total wage; on the other hand, the municipalities try to avoid them for financial reasons. According to an interview partner of the municipality, there are

² <http://www.wien.gv.at/recht/landesrecht-wien/landesgesetzblatt/jahrgang/2010/pdf/lg2010042.pdf>

no differences between men and women due to the regulation by the scheme, neither on employees' nor managers' level.

As for wages in private companies and outsourced services, statements of the interview partners contradict one another. While a unionist mentions 'dumping prices' (defined by one interview partner as 'anything below EUR 5 per hour') in the private sector as opposed to the public sector, an employers' representative speaks about rather high wages. He explains this high wage level by demand and supply, i.e. the fact that nobody would do the job otherwise because of the bad image. According to him, the wage level has always been high and has not changed very much. Another interviewee also identifies high wages in certain private companies even in low-skilled jobs, with people in some Austrian regions 'scrambling for the jobs'. Comparing one and the same job between different employers, the wage can vary within a range of about 50%.

Nevertheless, waste collectors in the private sector are currently at the lower end of the spectrum and would benefit most from a collective agreement even if unions claim starting wages at the level of the current minimum wage at EUR1,300 gross. In Salzburg, though, to name an example, waste sorters are found in a pay bracket for skilled workers and would lose with a new agreement. Currently, they earn about EUR 1,700 to EUR 1,800 gross wage (regular time-based income, not based on accord work or supplements).

4.3 Vulnerable groups

Vulnerability is closely linked to the type of activity performed in the sector. As a rule, it is particularly employees working in waste sorting in the private sector who are confronted with low quality of work.

Manual sorting

Being classical assembly-line work in character, manual sorting is regarded as the most problematic activity in the sector. It is characterized by exposure to dust, bad smell, ugly sights, monotonous work and reportedly very low wages, particularly in private companies, which keep wages low in order to be able to make cheaper offers. A specific problem is that of unpredictable risks in terms of dangerous substances, such as dangerous objects or inflammable material in the waste that has to be sorted. One of the interviewees describes the job and the workers as follows:

'And that's about the pits. Well, there are migrants, unskilled workers, women standing at the conveyor belt. This is the pits. And then, you can hope that they have a vacuum device, the dust exposure there is crazy. I don't know to what extent that's already common by now, [...], that there is a vacuum device etc. And this unpredictability of danger follows from that you never really know what's in it, yes. So it can happen to you that you reach into a plastic bag and there is an injection needle inside. Or other things which can hurt you.'

According to this expert, it is a matter of political will to change the situation in manual waste sorting. As he analyses, the protection of workers was simply not high on the

agenda when political and economy-driven decisions were made about how to organize waste sorting in a more general sense.

Summarized, the prevalence of manual sorting seems to be due to three factors: First, a lack of consideration of working conditions, second, economic interests, third, a limitation of the work protection regulations. An interviewee explains:

‘And from the economic point of view, for any sorting plant operator it’s certainly ... well, if you don’t earn more by this kind of mechanical sorting, then he just stays with his plant and says: ‘Well, then I keep it running for 2 more years, there is enough workforce for these jobs anyway, who I don’t need to pay anything for’, right? And why should he change that? Yes.’

Women and gender equality

Women in the sector are primarily found in sorting (cf. 4.1.1), although there, they also are a minority. The fact that the share of women employed in the sector is fairly low is explained by stereotypical perceptions of gender differences with regard to the physical character of activities with higher quality of work, such as waste collection.

In the municipality of Vienna, e.g., there are about 3 to 4 female employees out of 700 in total in the area of fleet and truck driving. In street cleaning, 10 to 12 out of 1,300 employees are women. Having to carry heavy garbage cans, sometimes located downstairs in the basement of a house, seems to be a self-evident reason for some of the interviewees explaining that women are not and are not supposed to be employed in these jobs – which have comparatively favourable working conditions and a tradition of masculinity (Billerbeck, 2000).

What becomes visible in this context is that the political agenda of equal opportunities, with politicians punctually trying to integrate women in the sector, and the approach of representatives and municipal managers diverge. With other employers, the picture seems to be similar, with women mainly concentrated in waste sorting and activities surrounding it. As a rule, the less manual and the more technical the activity, the higher is the share of male employees.

Linked to the concentration of women to waste sorting, this is also the area in which part-time work is more common according to experts’ statements. This is explained by the fact that part-time can be easily organized for the work at the conveyor belt. In waste collection, part-time work is perceived as difficult to organize as it does not go together with the workflows.

Migrants

Like women, migrants, too, are concentrated in sorting according to experts’ statements, and this is explained by the low quality of work (but see 4.1.1 where this is not observed in the NACE 38 employment figures). In this perspective, it is the typical kind of job that Austrians would refuse to do because of the low income and the characteristics of the job. In other words, waste sorting would not work if migrants did not do the job. According to

employers' representatives, however, the wages in the sector are rather good, as otherwise the job would not be accepted by any worker, and therefore, employees are rather heterogeneous with regard to qualification and origin. Nevertheless, a sector expert (from the employers' side) suspects that low-skilled workers are easily and quickly dismissed if they do not comply. However, from 2006 onwards migrants rather than Austrians have lost jobs, and it is possible that with the economic crisis and restructuring in other sectors, the sector attracts more low-skilled Austrians. Migrants are more present in private companies than in the public sector. In the MA 48, migrants work mainly in street cleaning, but they are usually Austrian citizens. Furthermore, the city of Vienna hires Romanian day-labourers in the context of charity initiatives for Romanians.

Meanwhile, some Austrian private companies apparently pride themselves on having a large share of Austrian employees. Other nationalities found in the sector are Slovaks, Turks and people from former Yugoslavia.

4.4 Skills and training

The generic unskilled worker

Interestingly, the stakeholders and social partners collectively do not express any particular interest in further training for low-skilled jobs in the sector, except perhaps in terms of health and safety. Workers in the sector, apart from engineers, are perceived as generic unskilled workers, not requiring any training and doing the simplest kind of work. How explicit this view is expressed can be illustrated by a quote of an employers' representative:

'In this sense you don't have any training, except for specialized areas, because it is not necessary at all. It's simply learned activities, where I just put the worker to the assembly line.'

A unionist's statement sounds similar:

'That belongs to the simplest schematic activities which you can carry out after a 3-hours training. So there are only basic hygiene prerequisites to be applied, in your own interest. To be careful that your finger doesn't get stuck in the conveyor belt. And that's that then.'

In summary, neither the social partners nor the employers, neither the state nor the clients appear to be committed to any skill upgrading. The same is assumed with regard to the workers. Rather, jobs in the waste sector are perceived as occupations in which people with low qualification still have the option to get a job that is reasonably paid. This includes people who formally do have a qualification, even if people cannot be said to be generally over-qualified. A trade unionist says:

'I think that for most people it is important to have the job, although they do not always consider it to be particularly attractive themselves. That's a matter of options you can choose between. In that sense, it is important that these jobs exist, because there are of course people who can only move in a very restricted labour market.'

And this is a concrete offer which they find on the labour market.'

In cases of long-term unemployment the education lacks can be substantial, including reading and writing. For people who somehow slipped through the education system, very-low-skill jobs may still be needed in the future.

On the other hand, there are some dissenting voices among experts. The representative of one of the unions involved points to the limitations of an industrial model of skill based on legally recognised apprenticeships as a basis for pay scales and job design (see chapter 5.2). He sees a wider range of informal skills and knowledge required in formally unskilled jobs and would like a more finely-grained recognition of ad-hoc trainings and experience. Another sector expert sees some further need for qualification with regard to accident prevention and also customer contact. This applies for example at the bring-in waste collection and sorting sites. Assisting customers there requires a general understanding for the process and an ability to evaluate what is valuable and could be refurbished and sold or what has to be treated with caution. In addition, employees with customer contact need social skills in how to interact with people, a certain social sensitivity and may need to be able to educate the public on how to separate waste. Furthermore, there are indeed skills that are required in spite of the image of the 'generic unskilled worker' and should be addressed rather than taken for granted: reading, writing, basic German skills, and soft skills such as punctuality, willingness to work, commitment, and mental flexibility. Such training is mostly pursued in secondary labour market projects aiming to improve the employability of the long-term unemployed, but could benefit the employed as well. Finally, an underrated 'skill' is the ability to cope with inconvenience and distress in unskilled and often problematic work.

Formal and informal skills

In theory, there is a formal vocational training for jobs in the sector in the shape of an apprenticeship for waste, sewage and recycling. However, few people chose to do this apprenticeship and few employers offer it. Stakeholders hardly ever mention it. The employers' association even perceives it as useless, as the majority of workers do not need it, except for some specialized areas where training – but another kind than the apprenticeship – is necessary. One problem of the apprenticeship is that the typical age group (between 15 and 19) cannot legally perform all the activities of the job because they are not allowed to work with dangerous substances or at certain working times. Those few people who are trained in this job are trained by the public sector.

Otherwise, skills are polarised, and the difference is clearly drawn along the line of blue-collar versus white-collar workers, which is still a very important (and controversial) distinction in Austrian labour law. In management and technical positions, there are of course highly educated specialists and academics. These employees are, e.g., responsible for the quality of recycled material and for obtaining adequate prices for sold material. Experts expect that more jobs with skills in chemical and industrial treatment of waste are developing with more complex treatments of waste.

Among the formal skills that can be found in the sector are professional drivers, electricians, metal workers, mechatronic technicians, or engineers. In addition, it is not uncommon for formally unskilled jobs especially in the public sector to be filled by workers with vocational training outside the sector who look for more security, especially in occupations with poor pay or precarious employment.

At the same time, some skills and company-specific trainings are restricted to a certain activity such as garbage collection truck driving. The employers' representative gives the following example:

'And then he is trained especially for this vehicle, where he works. [...] And apart from that he doesn't need anything, 'cause the whole day long he doesn't do anything else but drive around with his truck and mend and maintain it accordingly and make sure that the machine stays okay. Therefore I have a very special training segment here, and that is handled in the company. And that's it.'

Other special and short trainings are needed in areas such as work with sewers or tank trucks, or legally required certificates for working with certain machines, with an excavator, with a truck, with a crane or with a forklift. Hence, as a unionist summarizes, workers may have particular qualifications which are necessary for them to be allowed to do the job in the first place, but these qualifications are not acknowledged with regard to pay or career options.

Career options

An expert from the public sector describes a typical career in a municipality as follows: You start as a seasonal worker, fixed-term for 3 months, then for 10 months, for about 4 to 5 seasons. Then, a permanent contract is possible, if there are available jobs. Waste collectors may be promoted to become waste supervisors, who supervise routes and coordinate personnel demand. Linked to specific training and an exam, a further possible step is to become inspector, who is in turn the superior of the waste supervisor.

Of those who become waste collectors, most have a vocational training, though this is not a criterion for being employed. Usually, those who apply are young, doing so after their vocational training and the military service. Applications can be handed in at the city hall or at the local office. There is a long list of pre-booked applicants, and according waiting times. Due to the pension reform, current employees expect to have to work longer; therefore, the waiting list for new applicants has recently become longer, too.

Generally, however, in the sector as a whole, the typical un-skilled worker in the sector rather changes jobs than developing within the company. This is particularly true for slightly higher-skilled workers. The number of jobs in the sector that un-skilled workers could move on to is restricted.

5 Section 5: Collective bargaining and social dialogue

5.1 The current situation

Overall, social partnership in this sector is comparatively fragmented, especially for the Austrian context of comprehensive collective agreements. The unions involved are the public sector's GdG, PRO-GE (and previously both the metalworkers' union and the union of chemical workers), Vida, also the building and wood union (where construction waste is concerned) and for the white-collar segment, GPA-djp. The employer side is rather more organised with the Waste Management Association leading negotiations, although all in all, five guilds are involved. The employer side has been aiming for a sector-specific collective agreement since 2005 with no success so far. One reason for this, on which social partners agree, is the heterogeneity of the sector (see 5.2).

Currently, a range of collective agreements apply. Some of them have been established on the company level where works councils are in place, and sector-level may have been inherited from a company's original sector such as logistics or utilities. Where there is no interest representation, the provisions of the code of civil law apply. They require a wage to be customary for the place and the sector – 'quite a complex task to figure out for an individual', says a union expert. Obviously, the working conditions and also the respective union's or works council's position in negotiating a new collective agreement are contingent upon the standard provided by the current agreements. For white-collar workers the agreement for the 'general trades' is deemed more favourable by the experts in charge than a sector-specific collective agreement. In sorting, often the agreement for the chemical industry applies, whereas the non-municipal waste collectors are often covered by the transport collective agreement – 'not a high-class collective agreement' says one of the union experts.

5.2 The collective agreement in progress

Negotiations for a sector-specific collective agreement were initiated by the employer side and led by the fairly newly established Association for Waste and Sewage Management. The agreement was intended to establish a minimal standard and hence would have had provisions well below the ones in the currently existing agreements – especially those that apply in the stronger unionised companies. Unions and workers thus are in a somewhat paradoxical position: Those workers that would be most likely to benefit from a collective agreement, the 'new jobs' in waste sorting and processing, especially in the smaller businesses, are not the union's primary constituency. The better organised segments in the sector, however, have more to lose, and their works councils have tended to veto preliminary results of the negotiations. Pointedly, an employers' representative summarises the dilemma:

'Even if the union says, we're interested in reaching a collective agreement for the sector; you need to put that into perspective: Of course they have an interest but their primary interest is to satisfy the unionised companies, and that is some 2 or 3,

and their works councils. Because that's the ones who pay their membership fees, to whom the union is responsible [...] And that's why it's failing all the time. Breaking down these high demands from the organised companies on a level for the entire sector, that won't fly, can't fly.'

Of course, there is an overlap of interest between the union and the organised companies in levelling the playing field, but as the association's secretary says, 'we're representing some 3500 companies', not all of which have a union presence.

Nevertheless, making progress on a framework agreement was comparatively easy at first. Unions for example swiftly agreed to flexible working hours in the public interest, knowing that for example, holidays increase the demand for waste removal. Wages and the number of working hours were sticking points, in several instances. A comprehensive 38.5 hour work week was also regarded as impossible by employers.

Originally, both employers and several unions wanted to include white-collar employees in the agreement. However, the generic white-collar agreement for miscellaneous trades provides for bi-annual pay rises for white-collar employees which the employer side did not accept. Eventually, the white collar union left the negotiations and stayed with 'their' collective agreement, without making things much easier.

'In the blue-collar segment, we've had basic wages ranging from 1,000 EUR to 1,800 EUR, applying the different collective agreements. And in addition, the municipal pay-scale with lowest basic wages and an extremely strong complex of bonuses.'

While a collective agreement below some existing standards would not prevent companies from concluding more favourable agreements or paying higher wages, unions are concerned about eroding the existing achievements. Companies might terminate them or hire new recruits under the new collective agreement, or even dismiss employees pending a change of contract. A new collective agreement would contain interim arrangements that provide for existing rights up to a certain date. Afterwards, the new agreement would apply unless further assurances are negotiated on the company level. New recruits would normally be covered by the new collective agreement, possibly with some extras on the company level.

'There are companies and employees who have nothing, right now. And anything, any agreement would be an improvement. There are also companies with very good company agreements for whom a collective agreement wouldn't be a problem because what they are doing anyway is above that agreement. But then the question is: What is the effect of a new collective agreement on existing working conditions? And are we able, from the employee side, to keep a certain level with something different in the background?'

In addition, there were tensions among the unions that brought additional discontinuity to the negotiations. A unionist:

'So, someone started. Then we talked among the unions. Then a second union

stepped in and said, hey, here or there, I don't really agree with that. So the person in charge said, right, this was the maximum we could get, so you try and do it differently. And then, like a relay race, the responsibility was passed to the next person. This way, two or three unions at different points in time took the lead in the negotiations. And while the others were working, responsibilities in the first union changed.'

One reason for this problem of delegating responsibilities is that unions were concerned they would lose their connection to workers in the sector if they let another union negotiate on their behalf. In the view of representatives of the non-leading unions, then neither the negotiators would be able to increase their membership base nor they themselves. This is a problem in industries that operate across different sectors and are likely to continue doing so.

A part of these disagreements appears to result from different organising and negotiating traditions and mind-sets of unions with roots in manufacturing or the service sector. The manufacturing unions, originally the chemical and metalworkers' unions, tend to have notions of skill, remuneration and the labour market that are rooted in an industrial model of non-skilled, semi-skilled or skilled work with skills being acquired in an industrial apprenticeship. Indeed, their experts agree that work in the waste sector is mostly unskilled. Vida, organising the varied world of services, has a more differentiated view of skill:

'In the industrial framework, it starts with the lowest wage group, a typical unskilled entrant into the sector, and then it jumps to skill levels, some kind of skilled occupation, according to the Vocational Training Law, and then it goes up from there. That principle doesn't work. In such a framework, there's nothing to differentiate for everybody else, all those who are not working in that scheme end up in the cheapest wage group and the other groups are closed to them. And that's many employees in Austria, if things go on like this it will be the majority soon who do highly skilled jobs that aren't recognised as skilled by law. We just have this one framework, the Vocational Training Law and nearly half the population isn't covered by that. They have to have a lot of skills, need to learn a lot, but it isn't called vocational training.'

On the employer side, the uneven interest in a collective agreement is a problem. The manufacturing union representative's comment mirrors the remarks of the association secretary:

'There are the larger companies that say, that's part of an order in the sector that we would like to have, it obliges others like us not to undercut a certain level. [...] And then there are employers that say, we've never had a collective agreement, we can work without one. And then there's groups saying, well let's wait and see what it says, and if it suits us we're in.'

An employer association's spokesman does not leave much doubt to his frustration and somewhat cynically concludes:

‘Obviously, the worker side is satisfied, because if working situations were developing that employees regard as unsatisfactory, then the pressure would be greater. Apparently, that is not the case.’

Nevertheless, the union and employer sides agree that their problems can be overcome, pointing to other collective agreements for heterogeneous and unlikely sectors such as temp agencies in which collective agreements have been concluded. Still, the configuration may be instructive for ‘new and growing jobs’: If employment is growing outside established union strongholds, if sectors are recomposed involving actors with different backgrounds and mind-sets, increasingly divergences within one side of the social partnership make themselves felt – while the conflict between social partners is not getting easier to handle either (Thelen and Van Wijnbergen, 2003). Then, prerequisites for previous negotiating successes may become both resources and liabilities.³ A union representative concludes:

‘It’s not magic. We’re not doing this for the first time. It needs some more negotiation, internal negotiation. That’s the problem, if unions aren’t accustomed to that, with other unions, other approaches, from the employees, the constituencies, if they aren’t accustomed to considering both sides.’

5.3 Contested issues

Social partners agree that the key issue is the wage level – and the question how desirable a collective agreement for the sector actually is. Existing wage differences may amount to 50% or more between small and large, organised companies. A unionist illustrates:

‘So, what to put into the collective agreement? The guy paying 50% more will say, what I’m paying, then the other guy has to pay the same. The one who pays less, says, what do you want? I’m a small business, that’s a big one, I can’t pay people 50% more, how could I? And if you say, okay, let’s meet in the middle, then both are unhappy. The one is afraid he loses something, for the other a quarter more is still too much.’

Also, gains among employees would be unevenly distributed. Another trade union representative says:

‘The ones benefitting most would be the [private sector] garbage collectors, because the logistics collective agreement is on a low level. Losers would be the current employees in my view. Just now the approach is a starting wage at EUR 1,300, the typical ÖGB demand for a gross minimum monthly wage [ÖGB = Österreichischer Gewerkschaftsbund, Austrian Trade Union Federation]. And there would be losers, where people sorting waste on conveyor belts are also skilled. They would lose. Not

³ This pattern has more frequently been observed in the German context (cf. Hassel, 2007). In Austria it is generally moderated by the comprehensive character of collective agreements, but this case shows how it can assert itself in the instances where there is none.

necessarily the old ones. But the new guy is just as skilled and stands next to him and should get 1,300 where now he would get 1,700 or 1,800 at least?'

Working times, notice periods, continuation of sick pay and job categories are regarded as negotiable even if unions need some negotiation and discussion among themselves. With regard to health and safety, agreement may be easily reached – and social partners agree that there has been considerable progress in the sector where employers realised that a lack of investment drives up absenteeism.

6 Section 6: Networks/initiatives – Relationships with other actors and institutions

In sum, a whole range of employers' and employees' representatives is involved in the field; each of them focussed either on public or private activities. Collaboration is complicated, as we do not only find the usual tension between employers' and employees' representation, but also the one between a public and a private focus, and, additionally, different interests and perceptions among the trade unions involved. In addition to the trade unions, the Federal Chamber of Labour has been committed to the improvement of working conditions in the sector for several years. The influence of all social partners involved is perceived as limited by political decisions and legal frameworks on EU and national level.

The difficult and tedious implementation of a new collective bargaining agreement is high on the agenda of the various stakeholders. Meanwhile, there are some other fields of activity, priorities and pain points. The most pronounced one is the issue of health and prevention measures. In some parts of municipal waste collection the concept of a 'healthy work-place' receives increasing attention. Measures include medical examinations for the workers, attempts to move vulnerable employees to less heavy waste collection tours and the implementation of a so-called 'health street' with medical examinations, tests, vaccinations etc. Other unions approach the health issue by trying to enforce a limitation of effective working times to a regular 40-hours-week with 8-hours-workdays. The Federal Chamber of Labour focuses more on the political context by trying to enhance the attention to working conditions in political conceptualisation and decision processes with regard to the organisation of the sector.

Public relations and image campaigning are further important activities. A popular good-practice-example in this regard is Vienna's MA 48, which has succeeded in establishing a strikingly good image for its work and its workers through poster campaigns, and a very visible orange uniform. Garbage collectors who work for special events such as public fiestas and parades are given limited edition orange souvenir T-shirts.

A lack of cooperation is perceived in the relation between the Labour Inspectorate and the Ministry for the Environment. As an interviewee criticises, there is a clear-cut distribution of labour between the two authorities and their responsibilities. That is, environmental and quality-of-work-related issues are dealt with largely independently rather than developing

holistic, systematic concepts which interlink the two perspectives. With regard to the working conditions in sorting plants, the interview partner illustrates:

‘That’s not an issue for the Ministry; it doesn’t appear in any report. Well, a lot is being evaluated, they write reports and make controls, but the standard of these plants from a workers’ protection perspective is not an issue for the Ministry, because they say: ‘That’s the responsibility of the Labour Inspectorate and [...] we’re just not interested in that.’

7 Section 7: Perspectives

Hutterer et al. (2009) see future developments of the sector centrally contingent upon the legal framework, which divides up responsibilities between manufacturers, defines secondary materials, regulates import and export conditions. Experts agree that Austria is well among the leading states in Europe with regard to legal provisions, technological state of the art and involvement of citizens and consumers in separate waste and secondary material collection. This, together with the strong presence of the public sector, will lead to more incremental developments in the future. Concentration in the private sector has been gradual and mostly takes place through mergers and acquisition, and is likely to stay that way. However, coordination with the neighbouring countries will be essential in order to reduce the incentives for undercutting the Austrian standards.

The figures in Table 7.1 show that between 2004 and 2009 municipal waste has still grown a fair amount. The reasons for that are an increasing population, smaller households, the demand for convenience meals and an increasing supply of throw-away products – and generally increased consumption of, for example, short-lived electronic goods. So far, prevention of waste in households thus sounds like a fairly vague aim. However, most of the growth occurred among the waste streams that are collected and processed separately. Further growth is expected to be considerably more limited – households are unlikely to get much smaller and just possibly, initiatives towards more eco-friendly design and waste prevention are expected to take hold.

Table 7.1: Municipal waste in Austria 2004 – 2016

Municipal waste	2004 (tons)	2009 (tons)	Change 2009/2004 %	2016 (tons) anticipated	Anticipated change 2016/2009
All	3,418,700	3,895,000	13.9%	3,933,000	1.0%
of which:					
Residual waste	1,382,600	1,402,100	1.4%	1,442,000	2.8%
Bulky waste	236,400	259,100	9.6%	267,000	3.0%
Separately collected municipal waste	1,799,700	2,233,800	24.1%	2,312,000	3.5%
of which:					
Hazardous waste and electrical goods	41,300	95,700	131.7%	112,000	17.0%
Secondary materials	1,212,100	1,386,000	14.3%	1,426,000	2.9%
Bio waste	546,300	752,100	37.7%	774,000	2.9%

Source: Federal Waste Management Plan 2011 (draft), own calculations

As the separated collection of waste in Austria is already highly elaborated, substantial further development is not expected in this regard. Future changes may – and should, from a working conditions perspective – occur with regard to the use of technologies in waste sorting at the conveyor belt. Nevertheless, interviewees agree that some sorting always will have to be done by human beings and, as a consequence, non-skilled jobs in this area will persist.

The current activities of Austrian companies to expand in Eastern Europe are expected to intensify in the future and to be extended to Southern Europe as well. Furthermore, the relevance of the waste sector as a provider of secondary raw materials is assumed to increase in the future. This may be linked to a growing demand for qualifications in the sector and potential new areas of activity. As for the collective bargaining agreement, negotiations will be continued, presumably later this year.

With regard to a further internationalisation of the labour market, experts expect little impact of the May 1st 2011 extension of EU labour market mobility to citizens of the NMS except Romania and Bulgaria in Germany and Austria. To prevent wage dumping and evasion of social security contributions, a new law has been passed in April 2011 to adapt various labour laws that implement the EU posted workers directive ('Lohn- und Sozialdumping-Bekämpfungsgesetz') – at rather short notice to inform their members, say employers' representatives. As before, posted workers in Austria must be paid at least the minimum wage stipulated in the respective collective agreement according to that collective agreement's wage brackets. Now, this rule also applies to Austrian companies. Failures to pay that wage can be punished with in between EUR 1,000 and EUR 10,000 per worker and double that if there are more than three workers underpaid. In repeat cases up to EUR 50,000 can be charged and a foreign company can be barred from providing services in Austria. In addition, the new law mostly facilitates controls. Foreign

companies must keep documents on wages in German at the work site. Controls by the KIAB agency (Kontrolle illegaler Arbeitnehmerbeschäftigung = control of illegal employment) will be intensified and a new competence centre to fight wage dumping is established which can start legal proceedings.

8 Conclusions

In sum, these findings allow us to conclude that the waste sector is fairly untypical for Austria in terms of the lack of a comprehensive collective agreement and the fragmentation of representation. It is an instructive example for a 'new' sector which has been undergoing massive restructuring for at least two decades, shaped by EU, national, federal state and municipal regulation in parallel, interlinked and conflict-laden ways. In addition, the sector is characterized by a tension of public and private sector activities and their various hybrids, and by frictions of environmental, political and economic motives, which usually receive higher priority than the needs and working conditions of employees.

Furthermore, the sector is telling with regard to the complexity of employees' representation. As the case of the waste sector illustrates, trying to achieve 'the best for the worker' is not always as straightforward as it may seem in the context of a tidily organised sector where it is merely employees' and employers' representatives' perspectives that diverge. Rather, different unions' tradition and their respective mind-sets, priorities and standards influence their attitudes towards objectives and negotiations. Where unions' and employers' aims and standards differ, and where the situations of the groups of workers they are supposed to represent vary substantially, it is imaginably difficult to arrive at an agreement with the actual 'other side'.

The waste sector is a sector in motion; it has experienced repeated and substantial changes in the last decades and will continue to do so in the future – amongst other things with regard to EU and national regulations, with regard to outsourcing and public procurement, with regard to environmental standards, and with regard to collective bargaining. While it has an 'identity' as a sector with regard to technical, environmental and political issues, with regard to work and workers it is fragmented by the polarisation of strongly organised companies and the public sector on the one hand, non-unionised regional SMEs on the other, and parts of the sector at the margins of other collective agreements.

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Annex: Development of employment, by NACE 4-figure subsectors

Table A1: Collection of non-hazardous waste ÖNACE 2008 38.11, no. of employees

Gender	Nationality	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Men	Austrian	1,822	1,879	1,921	2,000	2,076	2,172	2,416	2,741	2,770	2,755
	EU15 w/out AUT	10	12	13	15	17	26	34	42	53	62
	EU12	41	40	41	39	43	46	47	54	64	64
	non-EU nationals	366	363	354	354	363	380	435	479	473	458
	All	2,239	2,294	2,329	2,408	2,499	2,624	2,932	3,316	3,360	3,339
	% EU nationals	2.3%	2.3%	2.3%	2.2%	2.4%	2.7%	2.8%	2.9%	3.5%	3.8%
	% non-EU nationals	16.3%	15.8%	15.2%	14.7%	14.5%	14.5%	14.8%	14.4%	14.1%	13.7%
Index	2000=100	100	102	104	108	112	117	131	148	150	149
Women	Austrian	543	564	573	561	573	619	683	791	830	823
	EU15 w/out AUT	5	7	8	9	9	10	9	12	12	14
	EU12	3	4	3	4	3	4	7	11	15	13
	non-EU nationals	58	58	55	60	56	54	68	80	82	69
	All	609	633	639	634	641	687	767	894	939	919
	% EU nationals	1.3%	1.7%	1.7%	2.1%	1.9%	2.0%	2.1%	2.6%	2.9%	2.9%
	% non-EU nationals	9.5%	9.2%	8.6%	9.5%	8.7%	7.9%	8.9%	8.9%	8.7%	7.5%
Index	2000=100	100	104	105	104	105	113	126	147	154	151
Men + women		2,848	2,927	2,968	3,042	3,140	3,311	3,699	4,210	4,299	4,258
% women		21.4%	21.6%	21.5%	20.8%	20.4%	20.7%	20.7%	21.2%	21.8%	21.6%
% non-Austrians		17.0%	16.5%	16.0%	15.8%	15.6%	15.7%	16.2%	16.1%	16.3%	16.0%
Men + women		2,848	2,927	2,968	3,042	3,140	3,311	3,699	4,210	4,299	4,258
% women		21.4%	21.6%	21.5%	20.8%	20.4%	20.7%	20.7%	21.2%	21.8%	21.6%
% non-Austrians		17.0%	16.5%	16.0%	15.8%	15.6%	15.7%	16.2%	16.1%	16.3%	16.0%

Table A2: Collection of hazardous waste, ÖNACE 2008 38.12

Sex	Nationality	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Men	Austrian	71	73	76	82	91	102	116	119	102	98
	EU15 w/out AUT	0	1	1	0	1	1	2	2	7	6
	EU12	1	1	1	1	1	1	1	1	1	1
	non-EU nationals	5	6	7	4	5	7	8	11	13	10
	All	77	81	85	87	98	111	127	133	123	115
	% EU nationals	1,3%	2,5%	2,4%	1,1%	2,0%	1,8%	2,4%	2,3%	6,5%	6,1%
	% non-EU nationals	6,5%	7,4%	8,2%	4,6%	5,1%	6,3%	6,3%	8,3%	10,6%	8,7%
Index	2000=100	100	105	110	113	127	144	165	173	160	149
Women	Austrian	21	21	24	26	27	34	35	34	32	30
	EU15 w/out AUT	0	0	0	0	0	0	0	0	0	0
	EU12	0	0	0	0	1	1	2	1	1	1
	non-EU nationals	0	0	0	0	0	0	0	0	0	0
	All	21	21	24	26	28	35	37	35	33	31
	% EU nationals	0,0%	0,0%	0,0%	0,0%	3,6%	2,9%	5,4%	2,9%	3,0%	3,2%
	% non-EU nationals	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Index	2000=100	100	100	114	124	133	167	176	167	157	148
Men + women		98	102	109	113	126	146	164	168	156	146
% women		21,4%	20,6%	22,0%	23,0%	22,2%	24,0%	22,6%	20,8%	21,2%	21,2%
% non-Austrians		6,1%	7,8%	8,3%	4,4%	6,3%	6,8%	7,9%	8,9%	14,1%	12,3%

Table A3: Disposal of non-hazardous waste ÖNACE 2008 38.21, no. of employees

Sex	Nationality	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Men	Austrian	977	1,144	1,212	1,306	1,486	1,677	1,854	1,827	1,814	1,771
	EU15 w/out AUT	2	1	3	5	5	11	17	32	33	27
	EU12	15	17	16	16	24	29	30	33	41	41
	non-EU nationals	153	153	142	158	176	204	210	201	146	134
	All	1,147	1,315	1,373	1,485	1,691	1,921	2,111	2,093	2,034	1,973
	% EU nationals	1.5%	1.4%	1.4%	1.4%	1.7%	2.1%	2.2%	3.1%	3.6%	3.4%
	% non-EU nationals	13.3%	11.6%	10.3%	10.6%	10.4%	10.6%	9.9%	9.6%	7.2%	6.8%
Index	2000=100	100	115	120	129	147	167	184	182	177	172
Women	Austrian	275	422	457	493	529	571	640	664	682	682
	EU15 w/out AUT	3	3	4	4	4	7	6	6	7	9
	EU12	4	2	2	2	4	8	8	7	8	6
	non-EU nationals	50	46	55	61	52	46	47	57	76	80
	All	332	473	518	560	589	632	701	734	773	777
	% EU nationals	2.1%	1.1%	1.2%	1.1%	1.4%	2.4%	2.0%	1.8%	1.9%	1.9%
	% non-EU nationals	15.1%	9.7%	10.6%	10.9%	8.8%	7.3%	6.7%	7.8%	9.8%	10.3%
Index	2000=100	100	142	156	169	177	190	211	221	233	234
Men + women		1,479	1,788	1,891	2,045	2,280	2,553	2,812	2,827	2,807	2,750
% women		22.4%	26.5%	27.4%	27.4%	25.8%	24.8%	24.9%	26.0%	27.5%	28.3%
% non-Austrians		15.3%	12.4%	11.7%	12.0%	11.6%	11.9%	11.3%	11.9%	11.1%	10.8%

Table A4: Disposal of hazardous waste ÖNACE 2008 38.22, no. of employees

Sex	Nationality	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Men	Austrian	124	133	144	141	152	162	171	172	168	167
	EU15 w/out AUT	0	1	1	3	4	2	4	4	2	4
	EU12	11	11	10	13	13	13	13	15	15	15
	non-EU nationals	16	17	13	15	16	14	14	14	12	12
	All	151	162	168	172	185	191	202	205	197	198
	% EU nationals	7.3%	7.4%	6.5%	9.3%	9.2%	7.9%	8.4%	9.3%	8.6%	9.6%
	% non-EU nationals	10.6%	10.5%	7.7%	8.7%	8.6%	7.3%	6.9%	6.8%	6.1%	6.1%
Index	2000=100	100	107	111	114	123	126	134	136	130	131
Women	Austrian	34	36	42	41	39	46	48	48	40	39
	EU15 w/out AUT	0	1	0	0	0	0	0	0	0	0
	EU12	1	1	1	0	0	0	0	0	0	0
	non-EU nationals	0	2	1	1	1	1	3	3	3	3
	All	35	40	44	42	40	47	51	51	43	42
	% EU nationals	2.9%	5.0%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	% non-EU nationals	0.0%	5.0%	2.3%	2.4%	2.5%	2.1%	5.9%	5.9%	7.0%	7.1%
Index	2000=100	100	114	126	120	114	134	146	146	123	120
Men + women		186	202	212	214	225	238	253	256	240	240
% women		18.8%	19.8%	20.8%	19.6%	17.8%	19.7%	20.2%	19.9%	17.9%	17.5%
% non-Austrians		15.1%	16.3%	12.3%	15.0%	15.1%	12.6%	13.4%	14.1%	13.3%	14.2%

Table A5: Recovery of sorted materials, ÖNACE 2008 38.32, no. of employees

Sex	Nationality	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Men	Austrian	543	582	625	644	685	666	739	789	853	829
	EU15 without AUT	15	15	16	20	22	22	24	31	29	28
	EU12	28	32	35	31	32	28	31	34	35	37
	non-EU nationals	257	247	239	223	214	156	167	179	188	171
	All	843	876	915	918	953	872	961	1,033	1,105	1,065
	% EU nationals	5.1%	5.4%	5.6%	5.6%	5.7%	5.7%	5.7%	6.3%	5.8%	6.1%
	% non-EU nationals	30.5%	28.2%	26.1%	24.3%	22.5%	17.9%	17.4%	17.3%	17.0%	16.1%
Index	2000=100	100	104	109	109	113	103	114	123	131	126
Women	Austrian	150	151	165	159	164	149	159	186	205	232
	EU15 without AUT	4	3	3	3	4	3	3	5	5	7
	EU12	3	1	4	4	4	4	4	6	8	8
	non-EU nationals	47	45	30	25	26	9	19	20	21	43
	All	204	200	202	191	198	165	185	217	239	290
	% EU nationals	3.4%	2.0%	3.5%	3.7%	4.0%	4.2%	3.8%	5.1%	5.4%	5.2%
	% non-EU nationals	23.0%	22.5%	14.9%	13.1%	13.1%	5.5%	10.3%	9.2%	8.8%	14.8%
Index	2000=100	100	98	99	94	97	81	91	106	117	142
Men + women		1,047	1,076	1,117	1,109	1,151	1,037	1,146	1,250	1,344	1,355
% women		19.5%	18.6%	18.1%	17.2%	17.2%	15.9%	16.1%	17.4%	17.8%	21.4%
% non-Austrians		33.8%	31.9%	29.3%	27.6%	26.2%	21.4%	21.6%	22.0%	21.3%	21.7%