



environmental
services
association

Environmental Services Association (ESA)

Annual report 2020-2021



The ESA in numbers

The Environmental Services Association has **67 full members** and **38 Associate Members**, representing an overall increase in membership of 14% from 2019/20



Combined, we estimate that our full members have an annual turnover of **nearly £7.5bn** in the United Kingdom



Our members directly employ **in excess of 44,000 people** – well over a third of the entire sector in the UK



Between them, our larger members alone operate **more than 100** local authority collection contracts



We estimate that our members deliver services from **more than 1,500** operational and regulated locations across the UK



Our members serve well **in excess of 300,000** private business customers and **more than 17 million** people in households across the UK on behalf of their local authority partners



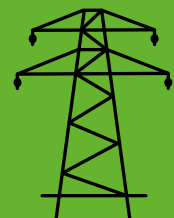
Combined, our members **collect or process tens of millions of tonnes** of waste material every year, of which a significant proportion is recycled



Our members have **invested £5 billion** in circular economy infrastructure in the UK over the last decade and plan to invest **a further £10 billion** over the next decade

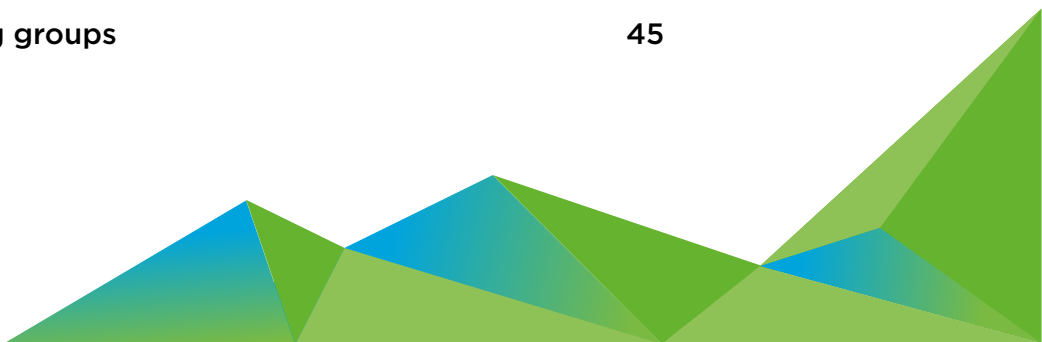


Collectively, our members divert **more than 10 million tonnes** of material from landfill each year and use waste to generate energy instead, producing over 5TWh of low-carbon electricity each year or enough to **power 1.5 million average UK homes**



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Chairman's foreword



Gavin Graveson
Chairman of the Environmental
Services Association (ESA)

There is only one place to start when looking back over the last twelve months and that is by thanking the thousands of dedicated people in the resource management sector who have continued to deliver essential services despite numerous issues caused by the Covid-19 pandemic. It is their hard work which has enabled us to maintain frontline services and contributed to the sector's enhanced national reputation for professionalism and resilience during this difficult period.

For the ESA too it has been an extremely busy year and I am pleased that my first as ESA Chairman has seen us make great strides on our strategic objectives, which are detailed in this report. On its members' behalf, the ESA has taken a leading role in a large number of important policy discussions that will shape the future of our sector in terms of infrastructure investment, recycling and carbon performance for the decade to come.

Not least of these is Defra's Resources and Waste Strategy (RWS), to which the ESA provided significant policy guidance through the consultation period this year to Government and industry stakeholders. This work will continue into 2022 as we await Defra's response to the consultations on Extended Producer Responsibility, a Deposit Return Scheme and Consistency in Household and Business Recycling Collections.



In May, we welcomed the launch of the ESA's ambitious Net-Zero Strategy, six months in advance of COP-26. This proactive initiative led by our Climate Change Working Group details the sector's strong ambition and credible plans to decarbonise our activities and support the UK in its Net-Zero goal.

The ESA, through our new Health and Safety governance structure and member working groups, has been working hard to deliver new sectoral safety standards across a number of different risk areas. We have also been working closely with the Environment Agency to improve standards and address problems within the environmental permitting regime. Ultimately it is absolutely vital these are addressed to enable our sector to fully play its important role in supporting the Green Recovery.

In addition to challenges caused by the pandemic, and labour market shortages – particularly for HGV drivers – waste crime remains a serious issue for our sector. This was evidenced by Eunomia's Waste Crime report commissioned by the ESA earlier this year and we will continue to support the Joint Unit for Waste Crime and press for tougher regulation to drive criminality out of our sector.

Next year looks set to be another busy one, with Defra's response to the RWS consultations heralding both significant change but also significant opportunity. Through the ESA we will work hard to ensure this delivers its full potential and unlocks an estimated ten billion pounds in investment in the UK by ESA members collectively.

The plastic packaging tax also remains a key piece of the puzzle to supporting this investment, helping to drive demand and close the loop on material flows, and this is due to be introduced from April 2022. Similar to the Landfill Tax, long-term we need greater clarity on a tax escalator mechanism, (on both a value per tonne basis and percentage of recycled content) to ensure the policy continues to drive investment and performance into the future.

Furthermore, now that we have an ambitious Net-Zero strategy for the sector, we must start delivering on our commitments. In the first instance this means working with the government to remove plastics from the residual waste stream, facilitate and connect the energy recovery fleet to a greater number of district heating networks and accelerate the transition to electric and zero-emissions vehicles.

We are grateful to all the organisations and individuals who have participated in the ESA's working groups this past year, along with the ESA policy team, who have been instrumental in delivering the work summarised in this report. The ESA will continue to keep up the momentum in 2022, both across the recycling and resource management sector and circular economy supply chains, working towards our strategic objectives to deliver less carbon, higher standards and more recycling.

Executive Director overview



Jacob Hayler
Executive Director of the
Environmental Services
Association (ESA)

In line with our first strategic priority, the principal focus for the ESA in 2020-21 was on the decarbonisation agenda and the development of a strategy to support the resources and waste management sector in pursuit of Net-Zero carbon emissions.

In 2020, we convened a Climate-Change Working Group, bringing together experts from within our members' organisations, alongside external consultants, to establish a holistic emissions profile for our sector and, subsequently, a credible roadmap towards Net-Zero.

I am proud to say that this work was completed early in 2021 and published later in the year, supported by a highly successful launch event attended virtually by more than five-hundred people, and including positive words from the Defra Minister and senior officials responsible for our sector.

This work ultimately found that, although our sector contributes huge net carbon savings across the economy, our direct emissions still account for eight per cent of the UK total. All public and private sector organisations involved in recycling and waste management, alongside government, therefore have a clear responsibility to pursue a Net-Zero trajectory and we ultimately believe this is achievable by 2040 with the right policy support from Government.

Since the launch of our strategy, at the time of writing, our sector's road to Net-Zero is already becoming clearer, with the granting of Royal Assent for the Environment Bill – underpinning legislation for the Resources and Waste Strategy (RWS); government support for our sector's involvement in carbon capture projects and positive discussions underway with various stakeholders about how the transition to zero emissions fleets could be expedited.

The ESA's Net-Zero Strategy reinforces the clear linkage between circularity of materials, resource efficiency and carbon emissions and the important role that recycling, re-use and waste avoidance will play in efforts to tackle climate change. The top priority of the Net-Zero Strategy is therefore to deliver on Government's ambition of achieving a sixty-five per cent municipal recycling target by 2035, which will be supported by the new policy regime across the RWS.

However, the RWS is underpinned by a highly complex new set of policy instruments and the ESA has been working closely with Defra and other government departments to ensure that each of the pillars of this strategy – producer responsibility, collection consistency, taxation and deposit returns – work together and do not result in market distortions, lower performance, unnecessary costs or other unintended consequences. In 2021, the ESA established a RWS Working Group to coordinate our response to Defra's second-round consultations and to scrutinise the options and proposals, which we continue to do leading up to Defra's response to the consultations expected in early 2022.

ESA members stand ready to invest an estimated ten billion pounds in new circular economy infrastructure over the next decade to meet the ambitions of both the RWS and Net-Zero goals, but need a clear and supportive policy landscape to underpin this investment.

In accordance with our second strategic priority to lead the progression of operational standards across our industry, we have also worked alongside other stakeholders involved in material reprocessing, to produce new industry quality standards for secondary materials – starting with fibre and plastics – building on our Standard for Responsible Export published last year. It is our intention that these new materials standards, once widely agreed and adopted, will underpin a revised and more pragmatic approach to regulation around the sale and export of these materials.

Perhaps our most comprehensive work on standards over the last year has been driven through the formation of a new ESA health and safety working group and governance structure, alongside a wide-ranging work programme outlined in more detail later in this report. Both the ESA and our members are proud of our efforts to set and improve health and safety standards and guidance across the sector through shared expertise and experience.

While on the topic of health and safety, unfortunately, the global COVID-19 pandemic has now extended across two annual reporting cycles and remains very much a part of our daily lives. Throughout the various phases of the pandemic, the ESA has supported its members by seeking regulatory adjustments, guidance and clarification where necessary, ensuring that the tens of thousands of dedicated frontline staff delivering essential waste collection and reprocessing services across the UK can continue to work safely – particularly over the lockdown last winter.

A mass vaccination programme throughout 2021 seems to have reduced the worst impacts for now, but our members remain vigilant to the safety of staff and to potential service impacts as we enter another winter season - which could see any staff shortages exacerbated by structural wider labour market issues that have arisen in 2021.

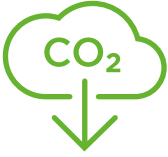
As we look towards 2022, we will see Defra's response to its RWS consultations, clarifying some of the detail and hopefully addressing some of the challenges and questions raised by industry this year. We also look forward to seeing more action on waste crime, with waste-tracking as well as reform of the Carriers, Brokers and Dealers regime - and of course the momentum on Net-Zero must continue.



ESA strategy overview

The Environmental Services Association has three strategic priorities that define its core activities. These priorities were established by the members in 2019 and will be reviewed again in 2022. Each of these three priorities are characterised by a number of objectives that guide our activities and operational focus.

We have indicated references in this report to just a few of the many examples evidencing progress towards these objectives.

Strategic priority	Objectives	Status update
 <p>PRIORITY #1 De-carbonisation De-carbonising the industry and maximising our contribution to carbon reduction across the economy</p>	<p>We will establish an ESA Climate Change Working Group, which will articulate our members’ ambitions for Net-Zero and develop a strategy to both measure and improve carbon emissions. A member network will be established to identify and explore low-carbon solutions for members’ fleets, offices, and operational facilities.</p>	<p>Complete — Section 6</p>
	<p>.....</p> <p>We will strive to achieve a zero-carbon waste and resources sector and maximise our sector’s contribution to wider UK Net-Zero targets by building relationships across Government and the NGO community. We will ensure that our sector’s integral contribution towards net-zero targets are recognised by both government and independent advisory bodies on carbon emissions and climate change.</p>	<p>.....</p> <p>Ongoing — Section 6.2</p>
	<p>.....</p> <p>We will publish an annual report on progress against these strategic objectives, which will include consolidated greenhouse gas emissions reporting for our membership from 2022 in line with our <i>Net-Zero Strategy</i> and the reporting methodology devised by our Climate Change Working Group.</p>	<p>.....</p> <p>In progress — Section 6.1</p>

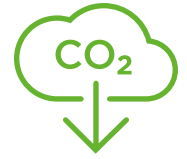
Strategic priority	Objectives	Status update
 <p>PRIORITY #2 High standards Achieving the highest standards within the sector to protect the environment, the public and our workforce</p>	<p>To ensure that our members' customers increasingly view ESA membership as a guarantee of quality, we will develop and adopt best-practice industry operational standards that will become the benchmark for ESA membership. Membership of the ESA will remain a key differentiator among operators in the resources and waste sector.</p>	<p>Complete — Section 7</p>
	<p>We will devise and implement a new Health and Safety Strategy to help our members maintain the highest standards of workforce protection within the industry, including tackling modern slavery.</p>	<p>Sections 7.1, 7.2 and 7.7</p>
	<p>We will develop new member standards to continually improve the quality of recycled material, building on the MRF Code of Practice. These standards will establish best-practice for handling and processing materials destined for both domestic and export markets.</p>	<p>In progress — Section 7.3</p>
	<p>The ESA will work with partners to tackle waste crime in its many forms. In particular, we will promote awareness and understanding of the Duty of Care requirements among waste producers and continue to push for policy reform that will prevent criminals from operating in our sector. We will also form strategic partnerships to support national and local crime-prevention bodies and will work with the Environment Agency to promote tougher action on waste crime and achieve more effective enforcement.</p>	<p>Ongoing — Section 7.4 and 7.5</p>

Strategic priority	Objectives	Status update
<p>PRIORITY #2 High standards Achieving the highest standards within the sector to protect the environment, the public and our workforce</p>	<p>We will review and update the ESA's rules and articles of association, which will include governance arrangements to ensure that all members have a strong voice.</p> <p>The activities of our member-led working groups will be aligned with our new strategic priorities and we will also review the membership and terms of reference of our working groups with these priorities in mind. We will continue to work on the range of benefits offered to members.</p> <p>.....</p> <p>We will build coalitions with other trade bodies to promote high standards across the sector.</p> <p>.....</p> <p>ESA will commit to promoting and championing the benefits of a diverse and inclusive workforce for our sector</p>	<p>Ongoing — Section 11</p> <p>.....</p> <p>Ongoing — multiple projects</p> <p>.....</p> <p>Ongoing — Section 7.10</p>
<div data-bbox="169 1240 328 1397" data-label="Image"> </div> <p>PRIORITY #3 Performance Delivering investment in an efficient and high-performing sector that helps the UK make the most of waste as a valuable resource</p>	<p>ESA members will deliver sustainable, efficient and high-performing infrastructure that is good for the environment and which facilitates a circular economy. The ESA will work with government and regulators to ensure policy and regulation supports this investment.</p> <p>.....</p> <p>We will strive to be a distinctive, influential and valued stakeholder by continuing to engage fervently with Government stakeholder and advisory groups, while strengthening alliances with parliamentarians, environmental groups and think-tanks across the political spectrum.</p> <p>.....</p> <p>We will work alongside local government bodies to help the public achieve the best quality recycling; improve recycling rates and address specific recycling challenges as they arise - while raising standards across the board.</p>	<p>Ongoing — Section 8.1 and 8.3</p> <p>.....</p> <p>Ongoing — multiple projects</p> <p>.....</p> <p>Ongoing — Section 8.1 and 8.2</p>

Strategic priority	Objectives	Status update
<p>PRIORITY #3 Performance Delivering investment in an efficient and high-performing sector that helps the UK make the most of waste as a valuable resource</p>	<p>We will set out a new communications and engagement strategy to build or enhance relationships with stakeholders across society in support of our three strategic priorities. As part of this strategy, we will commission and contribute annual original research relevant to our strategic priorities; publish parliamentary briefing papers and position statements; respond to government consultations and host events to increase interaction between our members and policy-makers. We will empower our various working groups to increase their public profile and to share their knowledge and expertise externally.</p>	<p>Completed – Section 8.4</p>



Decarbonisation of the sector



The ESA established a Climate Change Working Group tasked with developing, alongside external independent consultants, a Net-Zero carbon strategy for the recycling and waste management sector in the UK.

This body of work, underpinned by data gathering and analysis conducted by specialist environmental consultancy, Ricardo, was completed in March 2021 and launched publicly to the wider sector later in 2021 with ministerial support from Defra and coverage in the national mainstream media. The full strategy, alongside the underpinning data and appendices, can be downloaded from the ESA website at www.esauk.org

ESA Net-Zero Strategy - key points at a glance

- The recycling and waste management sector has reduced its GHG emissions by 46% since 1990 but still contributes **8% of UK carbon emissions**.
- Our sector's largest direct and indirect emissions contributions (scope 1 and 2) arise from recycling processing plants, which use significant amounts of energy. **These emissions are expected to increase** as more materials are collected for recycling over the coming decade and before the electricity grid is decarbonised.
- Other significant scope 1 and 2 emissions include those from the landfilling of residual waste and from waste collection and transport, followed by those from energy recovery operations and transfer stations.
- The ESA's Net-Zero strategy sets an ambitious but credible target for the recycling and waste management sector to **reduce these emissions to net-zero by 2040**. To achieve this the strategy sets three priority objectives for the sector:
 - Invest £10 billion in recycling infrastructure to drive up recycling rates and reduce residual waste, while also increasing the capture of methane emissions from landfill to 85% by 2030



- Decarbonise non-recyclable waste treatment by diverting organic waste from landfill to recycling and energy production by 2030, and by removing plastics from energy recovery facilities. Deploy carbon capture technology across energy from waste facilities where feasible by 2040
- Purchase only zero emissions collection vehicles from 2030, phasing out petrol and diesel entirely by 2040. Move vehicle and all on-site fuel use to zero emissions sources by 2040
- All priorities and targets within the Net-Zero Strategy will be assessed and reviewed every five years to take account of internal progress, policy changes and market shifts - ensuring that they remain both achievable and ambitious.
- Using the measurement methodologies within the report, the ESA will create and implement a carbon emissions reporting regime to track members' consolidated performance from 2022.

“The ESA’s commitment is absolutely vital in helping us achieve our world-leading target of net zero greenhouse gas emissions by 2050, building a net zero economy and leaving the environment in a better state for future generations.”

Rt Hon George Eustice MP
Secretary of State for Environment,
Food and Rural Affairs

Next steps

ESA members, their customers, and their supply chains – alongside the wider resources and waste management sector – will have a significant and direct role to play in achieving the targets outlined in our Net-Zero Strategy, but the sector will not be able to achieve Net-Zero without the actions of other sectors and stakeholders.

In accordance with our organisational strategic priorities, the ESA wants to maximise our sector’s contribution to Net-Zero targets by building relationships across Government and the NGO community, while also ensuring that our sector’s integral contribution towards national targets both to date, and in future, are recognised by both government and independent advisory bodies on carbon emissions and climate change.

The ESA will continue to engage with government and other stakeholders to ensure that:

- GHG emissions accounting takes a holistic view of the recycling and waste management sector and is not considered in silos based around individual aspects of our sector's activities.
- The necessary policy framework is implemented to underpin delivery of circular-economy infrastructure that, in turn, will support our sector's transition to Net-Zero. In particular, we will continue to work with UK Government and the devolved administrations to support the delivery of the Resources and Waste Strategy for England and the corresponding strategies in Scotland, Wales and Northern Ireland.
- A positive and supportive regulatory framework exists which incentivises and encourages the sector's efforts and investments in a low-carbon and more circular economy.

Since the publication of the Net-Zero Strategy, the ESA has been actively exploring a number of policy initiatives at an official level with various Government departments, particularly in support of unlocking Carbon Capture Utilisation and Storage (CCUS) for energy recovery and for expediting the transition to electric vehicle fleets as two priority areas in need of sector-specific interventions to support delivery. We look forward to providing an update on our policy progress towards Net-Zero in 2022.

As part of future Annual Reports, we will report on progress against the objectives set out in our Net-Zero Strategy. With a clear and credible carbon accounting methodology now established for our sector, we will work over the coming year to create a consistent and equitable reporting regime to track the consolidated emissions performance of our membership over time.



Promoting EfW Heat Networks

Alongside decarbonisation of feedstock and carbon capture and storage (CCUS), maximising the thermal efficiency of both current and future energy recovery facilities is key to extracting the best carbon emissions performance from this residual waste treatment solution. Many existing plants are capable of exporting heat to district heating networks as well as electrical energy, but there have been many practical challenges to date which have hindered the viability of these networks.

To help address these challenges the ESA worked with the Association for Decentralised Energy (ADE) in 2020/21 and hosted a joint heat networks workshop in early 2021, bringing together energy recovery operators, policy-makers and heat-network operators to explore and address barriers to heat network connections for existing and future EfW plants.

One of the barriers identified was that access to technical specifications for plants was not always easy to obtain for prospective heat network developers, so the ESA has been working with its members this year to collate full technical specifications for each facility capable of exporting heat. We have developed an online tool to present this information in an accessible format and hope to publicly launch this tool alongside the ADE in early 2022.



Driving high standards



Health and safety – programme structure

The pursuit of ever higher health and safety standards is a strategic priority for the ESA and we have made good progress against the objectives of our H&S Strategy, following the restructure of our H&S governance announced in the 2019/20 Annual Report.

Seven working groups were established early in 2021 and each was tasked with developing guidance and other resources on a specific area of risk. The outputs of these groups to date have been uploaded to the ESA website and it is our intention to work with the WISH (Waste Industry Safety and Health) Forum to adopt these as WISH guidance for the benefit of the wider sector.

With most working groups having completed their objectives, the ESA has started to prepare a revised 2022 H&S work plan, with a fresh focus on further priority risk areas. An overview of the current H&S programme can be found overleaf.

Health and safety - performance

ESA collects and consolidates health and safety data from our members to help monitor progress against the targets set out in our H&S Strategy.

The latest RIDDOR injury rate was 462 (per 100,000 employees), representing an 18% reduction on the previous year and this is more than three times lower than the injury rate for the waste industry as a whole as reported by HSE. In 2020 the ESA adopted a new 'days lost' performance measure for the first time, and the reported figure of 7559 days lost (0.06% of all days available) will form the baseline against the H&S Strategy's target to reduce days lost by 25% by 2025.

Third party acts of violence and aggression against waste operatives have emerged as a worrying trend, and with a notable increase in such incidents during the pandemic. The ESA participated in a joint project between the Health and Safety Executive and Manchester University to help research the extent and trends of this issue across the UK workplace. We have extended our data reporting exercise to capture data of such incidents on a quarterly basis.

ESA also rolled out a scheme to allow members to visit each other's sites to enable good H&S practice to be seen first-hand. The first in the series of such visits took place in 2021 and, having been well received, will continue into next year.

Health & Safety work programme overview

1 Strategic performance monitoring

- Develop a climate survey tool to establish an industry safety-culture baseline.
- Develop a set of leading indicators to help ESA members monitor H&S performance - with an initial focus in Q1 2021 on roll out of "days-lost" as a new injury reporting measure.

Project lead: 

2 Creating a risk assessment approach

- Create tools and resources to help embed a risk assessment approach into company operations, better enabling site managers to proactively identify risk and control measures, and communicate such with those engaged in relevant activities.
- Develop guidance and standards for undertaking both activity and process risk assessments - working with digital system providers to support this approach.

Project lead: 

3 Improved H&S competence

- Review existing data and current practice to help produce a strategic plan for improved competence.
- Develop common H&S competence standards for supervisors; H&S induction; and contractor control, with associated training materials and assurance or certification requirements.

Project lead: 

4 Waste collections

- Deliver a campaign to raise awareness of the circumstances which lead to incidents of manual handling and slips, trips and falls.
- Develop learning and induction tools to reduce manual handling risks and slips, trips and falls during waste collection activities - with an emphasis on situational awareness.

Project lead: 

5 Vehicle & pedestrian interface

- Identify human factors involved in past incidents and develop new control measures to prevent accidents - helping to improve understanding of risks associated with pedestrians around vehicles.
- Develop a risk assessment template; checklist and suggestions for technical aids to help reduce risks of the vehicle/pedestrian interface.

Project lead: 

6 Occupational health monitoring

- Identify the hazards posed to operations from bio-aerosols.
- Assess the risks posed by bio-aerosols to the workforce.
- Manage and control the risk of exposure to bio-aerosol in the workplace.

Project lead: 

7 Mental health

- Understand the extent and impact of mental health issues within the waste management industry and identify best practice in other sectors to promote good mental health.
- Develop tools to support efforts to address and raise awareness of mental health, with an initial focus on coping with the impacts of COVID-19.

Project lead: 

Setting industry quality standards for secondary materials

During the course of the past twelve months, the ESA has been leading the development of clear objective quality standards for paper and plastic recyclates sorted for reprocessing that we hope will be adopted across the industry as the de facto standard.

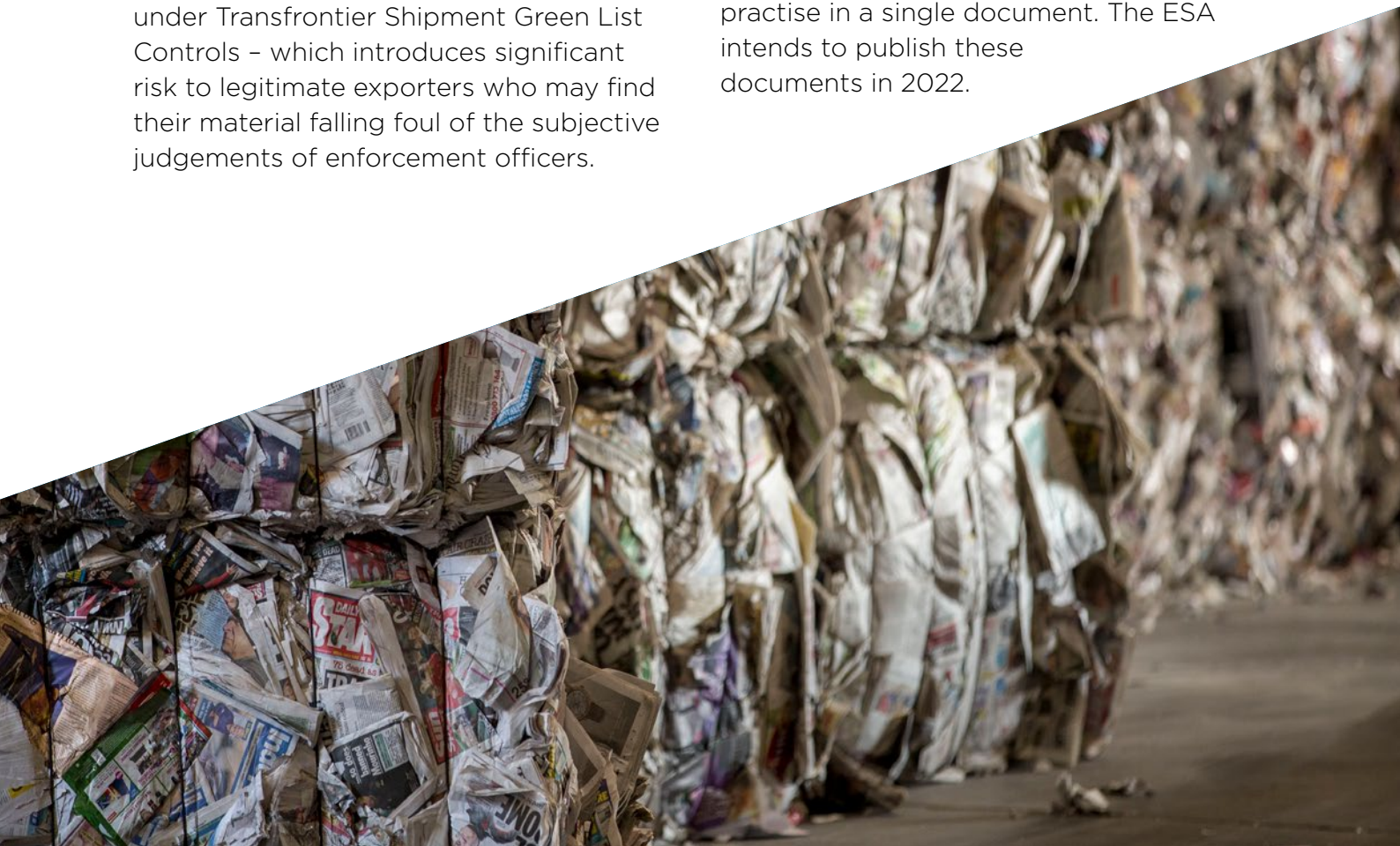
Clearly the quality of sorted recyclates is essential to the successful recovery of materials, and the vast majority of UK secondary materials sorted for reprocessing achieves a very high quality (in respect of the proportion of non-target material), but there is a gap when it comes to practical, objective, industry-wide standards.

Further rationale for creating and adopting more objective standards is the lack of regulatory clarity over what constitutes “de-minimis”, or “substantially free of contamination” for the purposes of export of recyclates for recovery under Transfrontier Shipment Green List Controls – which introduces significant risk to legitimate exporters who may find their material falling foul of the subjective judgements of enforcement officers.

The ESA has worked not only with its members but also others such as RECOUP, the Recycling Association, British Plastics Federation, and paper industry representatives to develop new best practice standards for both paper and plastic.

During this process, we have also engaged the Environment Agency (EA), the Scottish Environmental Protection Agency (SEPA), the Northern Ireland Environment Agency (DAERA), Natural Resources Wales and Defra in this work. The standard for paper recyclates was approved by the ESA Board in early 2021 and work continues on the standard for plastic, with the aim of completing this work by the end of 2021.

In addition to setting very high objective quality thresholds for non-target material, these emerging standards take an approach similar to that taken by the EA and WRAP when designing the various Quality Protocols – setting out an “end to end” approach for the process, with the aim of collating current industry best practise in a single document. The ESA intends to publish these documents in 2022.



The soaring costs of waste crime

Building on earlier ESA waste crime studies in 2014 and 2017, a new research report commissioned by the ESA in early 2021 found that the total annual cost of waste-related crime in England alone has increased by 53% in just three years and now costs the country nearly a billion pounds a year.

The ESA published the findings of this research earlier this year, which show that the cost of waste-related crime in England has grown exponentially, with costs rising from £604 million in 2015 to more than £924 million in 2018/19. When the available data for England is scaled and applied to Scotland, Wales and Northern Ireland too, the estimated cost to the UK rises well above a billion pounds.

The report, entitled *Counting the cost of waste crime*, reveals that the two most costly forms of waste crime to England's economy are fly-tipping, which now



Cost of Waste Crime in England £924m 2018/19

'Waste crime' covers any activity that transgresses the laws governing the management of waste.

For 2018/19, the cost of waste crime in England is estimated across 6 main types of waste crime, plus the cost of enforcement.

This estimation includes costs to the public sector (e.g., loss of taxes), the private sector (e.g., loss of revenue) and to the wider environment, as well as benefits gained from fines and revenue from recovered waste.

Note: Numbers may not add up due to rounding.



exceeds £392 million (rising from £209 million in 2015) and the operation of illegal waste sites, which account for an estimated £236 million (up £98 million since 2015).

The independent research was undertaken for the ESA by Eunomia Research & Consulting and shows that these costs have risen due to a range of factors, including an increase in the number of recorded waste crime incidents taking place across the country.

Types of waste crime range from fly-tipping, illegal dumping and uncontrolled burning of rubbish, through to major export fraud and tax evasion.

Alongside the Eunomia research, the results of a national poll undertaken by YouGov for the ESA suggest that householders are unknowingly leaving themselves open to enforcement action through a lack of awareness of their legal duty of care for the safe disposal of their waste, or through failure to undertake legal requirements when arranging for their waste to be collected and disposed of by third parties other than their local council.

The YouGov poll found that fewer than half of those surveyed knew they had any legal responsibility for the proper disposal of their waste and seventy per cent of respondents were not aware they could be personally prosecuted if their waste fell into the wrong hands or ended up dumped illegally.

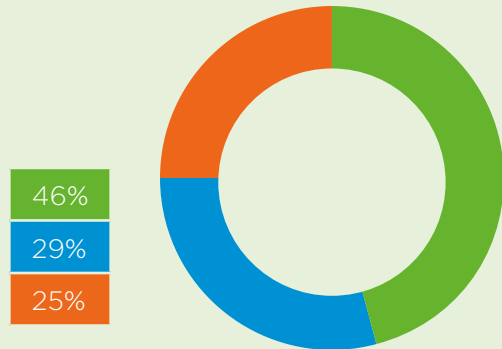
The YouGov results potentially signal the need for consumers and businesses to become more aware of their legal duty of care when employing companies or traders to take away their waste - with nearly two thirds of respondents admitting to not knowing how to check that the people collecting their waste were legally authorised to do so. The ESA continues to promote waste producer Duty of Care through the Right Waste, Right Place campaign.



On behalf of the ESA, YouGov surveyed more than 2,000 people across the UK to find out what people know about their legal duty of care when disposing of waste privately. Here are some of the key responses which indicate that there is still more work to be done to raise wider public awareness of duty of care for waste disposal.

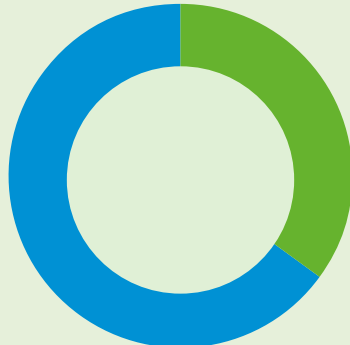
Prior to this survey, did you know that you have a legal responsibility for ensuring your waste is disposed of correctly?

Yes, and I know what my legal responsibilities are
Yes, but I am unsure what my legal responsibilities are
No



Do you know how to check whether the person or organisation collecting your waste is authorised to do so?

Yes 35%
No 65%



Prior to this survey, did you know you can be prosecuted if you don't undertake the correct checks and your waste is improperly disposed of (e.g. fly-tipped)?

Yes 30%
No 70%



Which of the following would you be likely to do if you had your waste collected by someone other than your local council?

I would check whether the person/organisation collecting my waste was a 'Registered carrier'	44%
I would ask to see a copy of their registration of carriers authorisation	30%
I would record the details of the vehicle used (e.g. registration, make/ model, colour of vehicle) to take my waste away	27%
I would check that the place my waste was going to authorised to receive it	25%
I would get a receipt from the person/ organisation collecting my waste	42%
None of the these	13%

Note: the above does not sum to 100% - each question is from the total (100%).

Working with the Joint Unit for Waste Crime (JUWC)

ESA strongly supports the work of the Joint Unit and we are a committed member of the joint unit's Oversight Board. It is only through collaboration and joint working that we are going to be able to tackle the scourge of waste crime in the UK and address its substantial cost to the economy evidenced in the Eunomia report. The Joint Unit brings together the right partners to facilitate this collaborative approach.

Working with the Environment Agency on permitting performance

The ESA has continued to work with the Environment Agency to address performance issues associated with the permitting system and the effect this is having on the delivery of key infrastructure vital to the UK's Green Recovery.

Earlier this year, ESA welcomed the Environment Agency's proposals for improving its permitting performance and reducing delays through its 'Permitting Improvement Programme'. However, we still await the more fundamental changes we believe are needed, which will be challenging for the EA to achieve unless additional resources are allocated to the EA's permitting process. We also welcome the move to end-to-end KPIs for permitting times, although remain concerned that these will only be applied to three of every four applications and may not therefore paint a truly representative picture.

ESA is committed to collaborating with the EA to help improve the permitting process and we have seen a helpful focus

more recently from the EA on the need to improve permitting. But the improvement programme is planned to last for three years and we are yet to see any real improvements in permitting performance since the programme commenced.

Tackling the scourge of modern slavery

In 2018, just under 7,000 people were formally identified as being potential victims of modern slavery in the UK - up 300% from 2013. The situation is, however, likely to be far more severe, with The Global Slavery Index estimating that there are around 136,000 people living in modern slavery in the UK at any one time.

The waste and recycling sector is a major UK employer, maintaining over 120,000 jobs (0.3% of total UK workforce). Despite operating in a highly regulated environment, with increasingly robust employment policies, the industry does embody a number of characteristics which can be exploited by criminal activity. These include high levels of sub-contracting and the employment of low-skilled temporary workers who often originate from outside of the UK.

Earlier this year, ESA made a joint commitment with the Chartered Institution of Wastes Management (CIWM) to tackle slavery, forced labour and human trafficking across the industry.

We hope that, by working together, our two organisations will leverage our combined membership to reduce the risk of modern slavery across the wider sector. This will be achieved by raising awareness and understanding of the issue, setting out clear codes of practice and sharing intelligence, guidance and best practice.

We will work collaboratively to tackle the problem alongside other charities and sector bodies.

Modern slavery is a horrific crime which can devastate lives and families and we know that the recycling and waste sector has been previously targeted by criminals. The ESA has set clear standards for its members, to help drive any criminal activity out of our sector, and these are enshrined within our code of conduct. ESA was also a key participant in efforts to develop a toolkit for avoiding slavery in the waste sector coordinated by the Indirect Procurement HR Forum.

Scottish Environmental Services Association (SESA)

The Scottish Environmental Services Association (SESA) was invited to provide evidence to MSPs on their scrutiny of the Scottish Government's updated Climate Change Plan, which sets out the Scottish Government's approach to meeting Net-Zero by 2045. For waste, the Scottish Government had set out a commitment to reduce the sector's current emissions of 1.9mtpa to 1.2mtpa by 2025, and to 0.8mtpa by 2030.

SESA also provided evidence to a Scottish Government review tasked with assessing the likelihood of Scotland meeting the July 2022 implementation date for its deposit return scheme. With less than 12 months until the 'go live date' and with the scheme administrator having yet to appoint its preferred bidder(s) or issue any DRS tenders, SESA noted that, on balance, July 2022 looked increasingly optimistic.

With Scotland likely to miss its various (2025) waste and recycling targets, the Scottish Government initiated a work

programme to develop a route map to get Scotland's waste targets back on track. SESA was invited to attend a number of pre-consultation working groups, each tasked with making recommendations on a specific package of measures or interventions. This will form the basis of a full public consultation in 2022.

Setting the record straight on Energy from Waste Performance

A Zero Waste Scotland (ZWS) report on the carbon performance of EfW published in late 2020 contained a number of factual and technical inaccuracies, which led to distorted conclusions that SESA felt held the potential to unnecessarily undermine public confidence in the role of energy recovery in the waste hierarchy, and lead to misinformed policy decision, on the grounds of EfW's carbon emissions performance over landfill.

SESA met with ZWS to raise our concerns and commissioned independent engineering consultants, Fichtner, to produce a rebuttal paper correcting some of the assumptions and flaws in the original ZWS report. Following a series of meetings between ESA, ZWS and other bodies, ZWS agreed to amend its report to reflect SESA's recommendations.

Subsequently the amended report confirmed that EfW had a greater carbon benefit over landfill for the treatment of residual waste than originally reported – rising to a 27% performance delta in favour of EfW over landfill compared with 14% in the original version.

Championing equality, diversity and inclusion for the resources and waste sector

In 2019/20, the ESA joined Energy and Utility Skills' Inclusion Commitment in recognition of the fact that the resources and waste management sector performs significantly lower than the all-sector average for the diversity of its workforce – both on gender and ethnicity. In fact, the wider environment sector is the second least diverse of more than 200 UK professions, according to a survey by Policy Exchange.

In making this commitment, we agreed to work collaboratively with our members to drive change; to focus on championing inclusion on the basis of gender, ethnicity and disability and to help our members attract a diverse new generation into our sector's workforce.

Further to this, in 2021, the ESA joined the Institute of Environmental Management and Assessment's (IEMA) Diverse Sustainability Initiative and has pledged to:

- Promote best practice diversity initiatives from across our industry in future annual reports
- Review our recruitment processes
- Review our equal opportunities policy
- Provide an update on progress from within our own organisation every six months as well as a summary of activity undertaken with and on behalf of our members

The goal, shared by the ESA, of the Diverse Sustainability Initiative is to build an Environment sector that is reflective of a modern UK and to improve diversity through education, connection and transparency - support current professionals in the sector and increasing the appeal and access for future potential professionals.

The following case studies represent just a few of our members' Equality, Diversity and Inclusion initiatives or outcomes from the past year.



Veolia campaign encourages HGV driving careers for parents

As businesses across the UK experienced a drop in trained HGV drivers, Veolia launched a successful recruitment campaign to encourage parents to consider a new career in the waste industry. Backed by bonus schemes the company also promoted the wider benefits compared to other HGV driving roles.

Drivers have the opportunity to work locally as part of their community rather than the assumed long-distance journeys and overnight stays. They will work in a small team with early starts and finishes that can more easily be fitted around school runs or other family responsibilities.

With the Road Haulage Association (RHA) predicting a shortage of about 100,000 drivers across the UK, in recycling and waste, Veolia reported an increased uptake in applicants for driving roles as a result of the campaign at a time when it was very challenging to fill this resourcing gap given the dynamics of this labour market.



SUEZ recycling and recovery UK's inclusion journey

Since 2020, SUEZ has embarked on a proactive approach to promoting equity, prompted largely by employees identifying inclusion and diversity as a key theme in the company's Wellness Charter.

Senior level buy-in was reinforced after members of the SUEZ Board listened to 18 colleagues from minority groups sharing their lived experience at work. This meant they could hear, first-hand, what could be done to make SUEZ a more inclusive place to work.

SUEZ has a Strategic Inclusion and Diversity Group, comprising members of the Board, which meets quarterly, steering SUEZ's approach

and instigating new initiatives – from becoming a Disability Confident Employer to introducing training for all employees.

To better understand the make-up of its workforce and to inform its approach, in March this year SUEZ also launched a campaign to encourage employees to share, confidentially, their sensitive information.

In 2021 a new Inclusion and Diversity Network was launched with over 40 employees. The network has run workshops to identify and promote inclusive behaviours and its members volunteer as ambassadors, encouraging open discussion across the company.

FCC shares case studies in support of International Women in Engineering Day

The UK currently has the lowest proportion of female engineers in Europe. The waste and recycling industry is particularly male dominated, where just 15.8 per cent of the workforce are female (EU Skills Waste Industry Profile).

This year, FCC supported International Women in Engineering Day (INWED), which has taken place every 23rd June since it began in 2014. INWED is an awareness campaign run by the Women's Engineering Society that recognises the work of female engineers

around the world and aims to encourage more women to enter the profession.

FCC Environment believes this situation needs to change and helped INWED to raise the profile of women who work in engineering, and to highlight the wide-ranging career opportunities available to women in the waste and energy sector by publishing a series of case-studies of just a few of the successful female engineers currently working at FCC. These stories are available from the **FCC website**



Supporting a high-performing sector



Resources and Waste Strategy

Defra's major policy reforms under its Resources and Waste Strategy (RWS) for England are now almost four years in the making but remain absolutely essential to the future of the UK's recycling and waste management sector. This new policy landscape will shape the next decade of investment in circular economy infrastructure and the country's recycling and resource-efficiency fortunes are also closely intertwined with the Net-Zero agenda, as our Net-Zero Strategy shows.

The ESA remains highly supportive of the Resources and Waste Strategy and our members stand ready to invest an estimated ten billion pounds in new infrastructure, as well as play a vital role in delivering, in practical and tangible terms, on the ambition of the strategy. But it essential that these complex policy instruments work in harmony with each other to drive performance, unlock investment and avoid unintended outcomes - while also delivering clarity over the long-term direction of travel and implementation plan.

Throughout 2021, the ESA has worked with a diverse range of stakeholders as well as Defra and other departments, to provide feedback on and input into the draft proposals and ensure the new regime enables our members to deliver on its promise.

To do this, the ESA established a Resources and Waste Strategy Working Group in early 2021 with the purpose of responding to Defra's second-round consultations and to provide on-going input as these policies move from the drawing board to implementation.

Defra published its proposals and consultation document on a Deposit Return Scheme (DRS) and Extended Producer Responsibility (EPR) on March 24th followed by a ten-week response period during which the ESA responded. The Consistency in Recycling in England consultation was published later in May (which ESA raised some concern over). The table below summarises some of our key positions in response.

Policy area	Activity for 2020/21	Key position summary
EPR	<p>Prior to the release of the consultation, we organised a series of meetings with Defra representatives to gather information on the content of the consultation and share our initial views on the proposals.</p> <p>During the consultation period, the RWS Working Group met five times to discuss ESA positions and draft a response.</p> <p>We organised a series of meetings with local authority associations, compliance schemes, packaging producer associations and retail associations to share ESA positions and collaborate on common positions.</p> <p>Earlier this year ESA coordinated an open letter to the Secretary of State at Defra to raise cross-industry concerns over proposals related to payments to businesses for packaging waste under the EPR system. This letter was co-signed by 12 other industry stakeholders across the value chain.</p>	<p>The ESA priority is to ensure that EPR reform will underpin investment in domestic reprocessing, through the implementation of more rigorous obligations on stakeholders across the value chain and more stringent requirements on exports.</p> <p>The EPR reform is designed to capture higher volumes and quality of packaging waste, and the ESA strongly supported measures to reduce contamination and incentivise more recycling, while opposing any proposals that could result in market distortion and damage competition.</p> <p>Our members contributed their considerable expertise to assess the practicality of the whole EPR system both in scope and structure, especially the different options proposed for the business packaging waste payment scheme.</p> <p>Our response highlighted the necessity for the EPR implementation timeline, particularly for the introduction of modulated fees and labelling, to be complementary to the introduction of consistent collections so that all parts of the system pull in the same direction.</p>

Policy area	Activity for 2020/21	Key position summary
<p>DRS</p>	<p>Prior to the release of the consultation for the Deposit Return Scheme, ESA contributed to the Environmental Audit Committee’s inquiry into the next steps for a deposit return scheme and met with Defra representatives on multiple occasions to discuss the details of the proposals.</p> <p>The RWS working group met 4 times during the consultation period to agree an ESA position, which was approved by the board on June 4th prior to submission.</p>	<p>ESA recognises the potential merits of a DRS in helping to capture additional materials for recycling, however, it should avoid disrupting current waste management practices.</p> <p>In a post-Covid context, the ESA believes that it would be preferable to introduce the collection-consistency regime first, alongside EPR for household and business collections, and to subsequently bring in a carefully designed DRS to complement the rest of the system and target any materials that are “leaking” out of the new system.</p> <p>If a DRS is implemented alongside the other RWS policies, then it should focus upon “on-the-go” format containers to reduce disruption to the system.</p> <p>It is imperative for investment in UK recycling that the DRS provides a secure long-term stream of recyclables for UK reprocessing, and that material is not simply exported. The scheme administrator should be required to demonstrate how the system will secure materials for reprocessing in the UK and support investment in domestic infrastructure.</p>

Policy area	Activity for 2020/21	Key position summary
<p>Consistent Collections</p>	<p>The Consistency in Recycling in England consultation period lasted from May to mid-July. The ESA raised concerns on behalf of members about the timing of the consultation document release – since all three needed to be considered together – leading to a reduced overall consultation response period in practical terms.</p> <p>The RWS working group drafted position papers on the conditions for the inclusion of plastic flexibles and the concerns over the potential implementation of a franchising system for business waste collections.</p> <p>We were also involved in multiple industry working groups on plastic flexibles and the collection of food and garden waste.</p> <p>These position papers were included in our consultation response.</p>	<p>The ESA believes that only plastic films which are widely recyclable and have existing end-markets should be included in the scope of services by material type.</p> <p>To ensure the recyclability of this stream, and to reduce the risk of contamination, plastic films and fibre should be kept separate.</p> <p>The implementation phasing is also important and the collection of plastic films from households and businesses should be aligned to reduce stress at sorting facilities.</p> <p>We believe that the introduction of a zoning system for the collection of business waste would reduce competition, slow innovation and adversely disrupt the commercial waste management system.</p> <p>We support the inclusion of micro-businesses from the start of the consistency proposal to significantly increase volumes of material recycled and believe that combining household and business collections in residential areas would reduce their cost.</p>

Tackling waste facility fires caused by discarded batteries

Batteries carelessly discarded alongside other waste, instead of being recycled separately, can cause serious fires at recycling and waste facilities. This puts lives at risk; disrupts essential services and causes millions of pounds of damage every year. Due to their volatility once damaged and power density, lithium-ion batteries pose a particular risk to recycling and waste management operations.

Data collated in 2020 showed that the proportion of all fires reported at ESA members' recycling and waste facilities suspected to be caused by lithium-ion batteries alone rose from around a quarter of all fires to more than a third (38%) year on year – equating to around 250 fires started by a li-ion battery during a twelve-month period.

In response to this, the ESA created and launched a consumer-facing education campaign to encourage consumers to Recycle Batteries Responsibly – supported by feedback from other stakeholders in the battery value chain, as well as Fire and Rescue Service representatives.

The campaign had three strategic objectives:

- Raise consumer awareness of battery fires and the importance of recycling batteries properly.
- Generate wider stakeholder support for the campaign – particularly among local authorities who have direct access to large consumer audiences.
- Enable the campaign to become self-sustaining by attracting financial sponsorship for future phases.

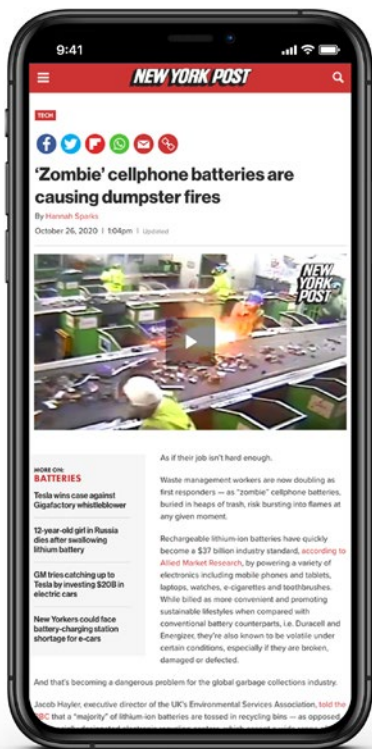
Early insight gathering found that battery-related waste fires have been historically under-reported and that existing battery recycling communications was primarily based on resource-efficiency messaging. Since this represented an information “gap” the creative team behind the campaign determined that the messaging should directly draw attention to the issue of battery fires and the dangers they pose – emphasising a linkage between an individual's behaviour and the potential for it to put lives at risk.



To do this, the creative team created the Take Charge campaign around the concept that used batteries are often referred to as “dead” and that batteries can be dangerous even after they’ve died - much like zombies. The Take Charge campaign therefore urged the public to “join the fight against zombie batteries” by “Recycling Batteries Responsibly.”

To support the launch of the campaign, a stand-alone website was created at www.takecharge.org.uk and a short film was produced, containing objective and accurate information about battery recycling. The website also featured a locator tool (kindly licensed from Wrap), helping consumers to find their nearest battery recycling points. A Take Charge Twitter profile was established to interact with stakeholders, media and individuals following the launch.

A supporter “toolkit” was also made available to download from the campaign website, containing a range of pre-prepared social media and static collateral which could be used and adapted by individual organisations to suit their own needs. The toolkit contained guidance about how to support the launch and advocated a genuine “open source” approach to collateral-usage with few restrictions beyond basic brand and messaging guidance.



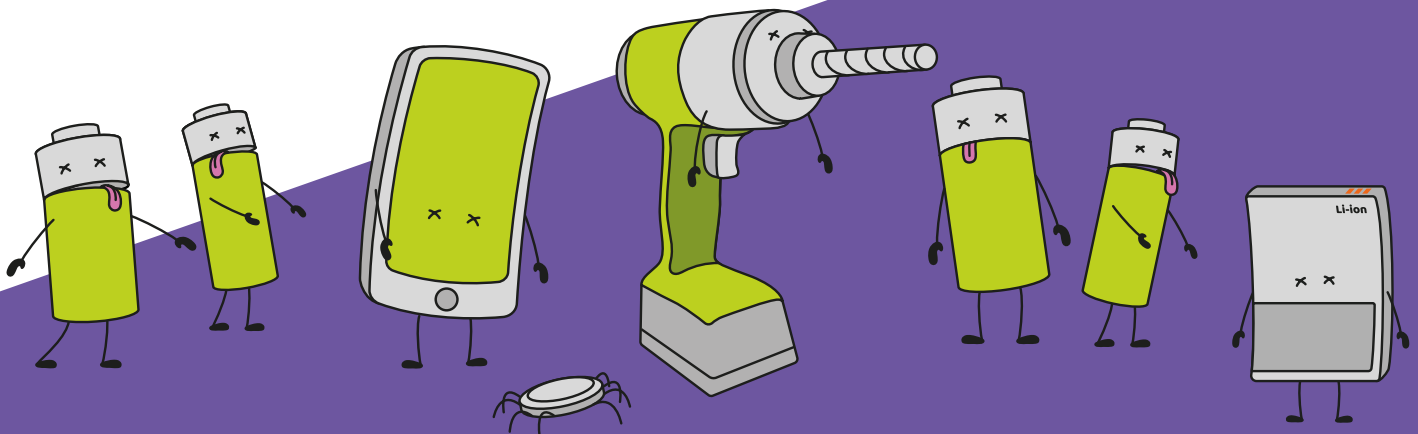
The campaign launched on October 25, 2020 supported by a highly successful media engagement programme which resulted in viral news coverage. On BBC online alone, the story attracted two million views and was the most-read story on the day of launch. The story was subsequently picked up by more than 200 additional media outlets including The Guardian, The Daily Mail, The Independent, Sky News, ITV News, The Sun and UNILAD – as well as regional BBC Radio and international news publications including The New York Post, Russian Television and the Sydney Morning Sun.

In the week following the successful media launch, and in the build-up to Halloween (to tie in with the campaign theme) the Take Charge Twitter profile was used extensively to engage with media organisations, stakeholders and individuals with the principle aim of driving traffic to campaign assets and acknowledging supporters' efforts to promote the campaign.

To date, more than 300 organisations have downloaded and actively shared the campaign collateral, including 25 per cent of all local authorities across the UK. With the ESA's permission, the campaign has also been successfully adapted and replicated at a national level in Finland and regionally in Canada and the US – demonstrating that the issue of battery-fires is not unique to the UK.

Since launching the campaign, in 2021, the ESA has worked with Material Focus to develop some consumer insight research into battery recycling and we intend to launch a second larger phase of the Take Charge campaign, informed by these insights and targeted at priority audience segments, in Q1 2022 – supported by a number of UK battery compliance schemes. We intend for Take Charge to be a long-running campaign and welcome expressions of interest in commercial sponsorship for this campaign. Those interested in getting involved in the campaign can contact Ben Johnson at b-johnson@esauk.org

TAKE ⊕ CHARGE



A planning regime to support circular economy infrastructure

Earlier this year, the ESA published a report entitled *Planning for a Green Economic Recovery*, which set out the crucial role that planning reforms could play in supporting future development of circular economy infrastructure in the UK.

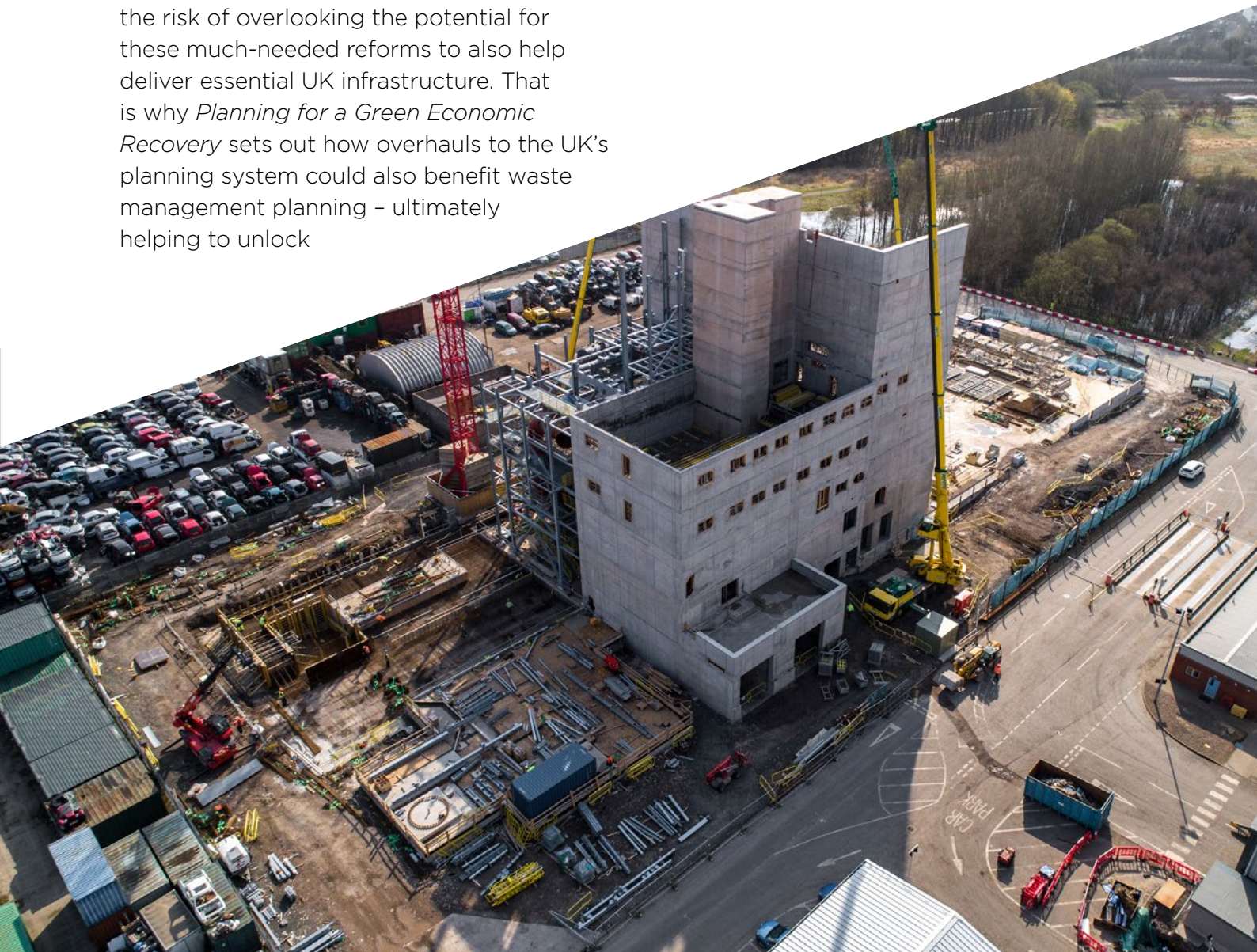
Significant reforms of the UK's planning system and a new Planning Bill are in progress, building on the broad policy principles and assumptions already set out in last year's Planning White Paper consultation.

However, much of the commentary surrounding these reforms to date has focused on the housing sector, which runs the risk of overlooking the potential for these much-needed reforms to also help deliver essential UK infrastructure. That is why *Planning for a Green Economic Recovery* sets out how overhauls to the UK's planning system could also benefit waste management planning – ultimately helping to unlock

the domestic recycling and waste processing capacity needed to meet Government ambitions to achieve a 65% municipal recycling rate by 2035 and Net-Zero greenhouse gas emissions by 2050.

Meeting these targets will require billions of pounds of investment in new recycling and waste management capacity, helping to on-shore the material processing activities that the UK currently relies on export markets to deliver.

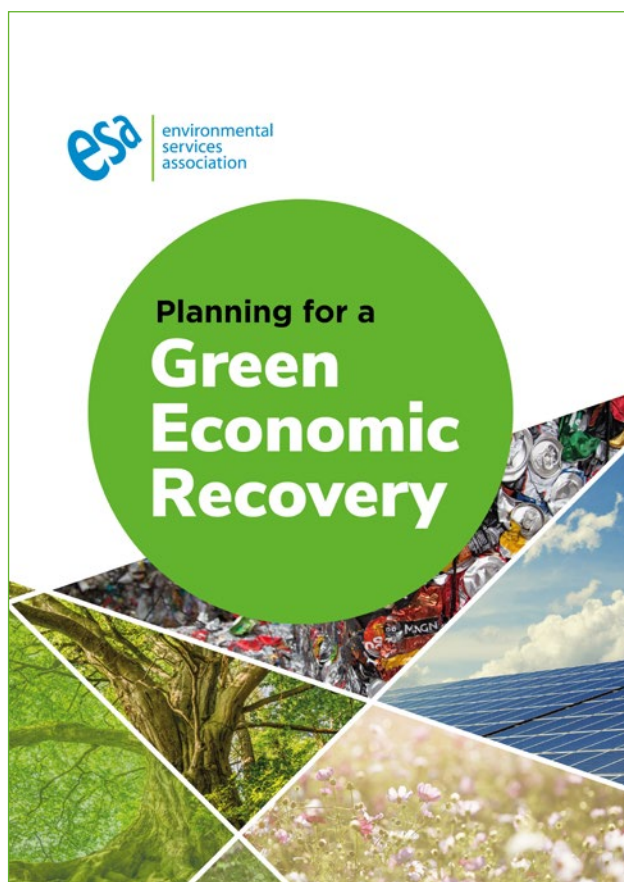
But the UK planning system must play its part in facilitating this transition and planning reforms should allow for a system which is more responsive to the needs of the modern waste management industry, and which recognises the dynamic nature of our operations.



With reduced reliance on landfill, much more secondary material is on the move as a valuable commodity, crossing local authority boundaries for recycling or processing as markets require. The ESA's view is that modern waste management development is consistent with development criteria in the envisaged "growth areas"; that it should be accommodated within Local Plans accordingly, and should benefit from a more streamlined, efficient, approval process.

We hope the various recommendations set out in Planning for a Green Economic Recovery will help inform debate during the Planning Bill's passage through Parliament and deliver a planning system more closely aligned with wider Government policies to preserve resources and reduce emissions.

The full report is available to download from www.esauk.org



Communications strategy

Each year, the ESA's Communications Strategy Group (CSG) reviews and sets out a communications and engagement strategy to build or enhance the ESA's relationships with stakeholders across society in support of our three strategic priorities.

This includes the commissioning and contribution of original research relevant to our strategic priorities; parliamentary briefing papers and position statements; responses to policy activity and other events or media engagements to increase interaction and understanding between our members and policy-makers.

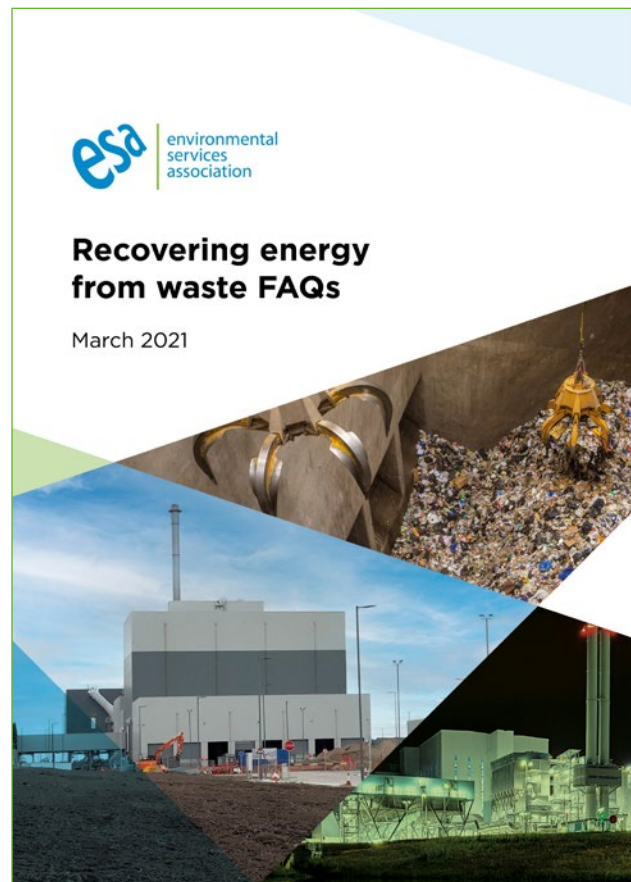
The ESA's communications strategy for 2020/21 focused on four key themes and objectives:

- **Knowledge hub:** Position the ESA as a "one-stop-shop" of industry knowledge for all stakeholders – leveraging the broad expertise and opportunities which exist across our membership and sharing knowledge among our membership.
- **Environmental leaders:** Promote the sector as an ally to society in the fight against climate change and reinforce the role of the ESA and its members as protectors of natural resources – delivering greater recycling, re-use and waste avoidance.
- **Striving for excellence and driving out crime:** Raise awareness of the consequences of waste-crime; duty-of-care and the importance of contracting with the legitimate sector while pushing for tougher regulation.
- **A valuable and influential partner:** Strengthen ESA alliances with policy-

makers, NGOs and cross-sector peers to enable effective policy-influence, and be a visible, credible, commentator in the media on relevant issues.

In addition to significant communications activity related to the COVID-19 pandemic, Resources and Waste Strategy consultations and the publication of our Net-Zero Strategy, one of the key communications challenges to emerge during this reporting period was a rise in “anti-incineration” campaign activity, which was largely driven by activist messaging around the carbon performance of EfW as a residual waste treatment option.

This culminated in a high-profile Channel 4 Dispatches programme, which the ESA participated in as the lone voice of the sector. To support this work, the ESA published a comprehensive FAQ position paper on the role and operation of energy recovery and this is available to download from the ESA website. This document will be updated and reviewed periodically to reflect the most recent evidence available.



ESA Members' Project Yearbook

In accordance with our strategic objective to deliver sustainable, efficient and high-performing infrastructure that is good for the environment and which facilitates a circular economy, the ESA is pleased to celebrate and showcase just a small selection of our members' recent investment milestones.

CASE STUDY



ESA Member:
**Hills Waste
Solutions Limited**

Project:
**Sands Farm Materials
Recycling Facility**

Location:
**Sands Farm,
Calne, Wiltshire**

Milestone:
Opening

Date:
March 2020



Hills Waste Solutions, in partnership with Wiltshire Council, have invested in excess of £10 million in a new materials recycling facility and supporting infrastructure at its Sands Farm Facility near Calne. The plant is capable of processing up to 52,000 tonnes per year of commingled recyclable materials principally collected from 228,000 households across Wiltshire.

The recent addition of a second operating shift has further created much needed regional capacity for commercially collected material. The Wiltshire Council municipal material is collected as part of a separate collection contract between Hills and Wiltshire Council and is one of the largest collections contracts in the country.

The plant includes screens with optical and magnet elements to maximise the recovery of paper, cardboard, plastic bottles (PET and HDPE), plastic pots, tubs and trays, cans (steel and aluminium).

CASE STUDY



ESA Member:

Veolia

Project:

**New electric vehicle fleet
for Westminster City
Council**

Location:

Westminster

Milestone:

Deployment

Date:

April 2020



Veolia and its partner Westminster City Council unveiled a 60-strong fleet of new and upcycled electric vehicles. The vehicles will make street cleansing services in the West End fully electric for the first time, reducing emissions and leading the way towards carbon neutrality.

The new electric fleet will be one of the largest operated by a waste and street cleansing contract in any local authority in the UK and a great example of the partnership working towards Imagine 2030; a strategy that aims to build a sustainable future for the city.

This fully electric fleet will allow an 89% reduction of CO₂e emissions compared to a diesel fleet, in line with Westminster City Council's carbon net zero by 2040 plans. It will also help improve air quality and lower noise pollution as electric motors are significantly quieter.



CASE STUDY



ESA Member:

enfinium

Project:

Kemsley

Location:

Sittingbourne, Kent

Milestone:

**Commencement of
operations**

Date:

July 2020



Enfinium began full commercial operations at Kemsley on the 16th July 2020. The waste-to-energy facility can divert up to 657,000 tonnes of non-recyclable waste from across the Southeast, with a generating capacity of 75MW (gross) as well as supplying up to 70 tonnes per hour of steam to DS Smith's adjacent Kemsley Paper Mill, helping to diversify its energy requirements.

CASE STUDY



ESA Member:

SUEZ

Project:

The Hub

Location:

Greater Manchester

Milestone:

Commencement of construction

Date:

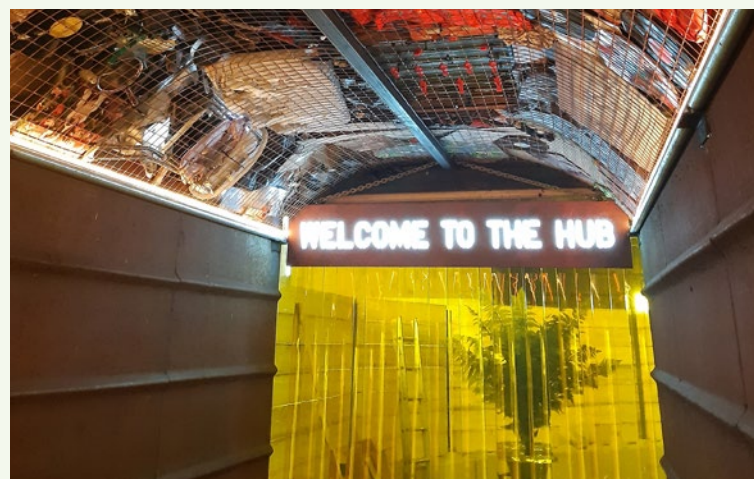
2021



With consumption being one of the biggest threats to decarbonisation, SUEZ and the Greater Manchester Combined Authority, are tackling reuse on an industrial scale with the ground-breaking Renew Hub, where construction began in 2021.

The Hub will bring together interested parties to deliver training in green skills and change behaviours towards reuse. It provides storage for items donated by residents for the authority's three reuse shops, as well as repair pods to upcycle items including electricals, joinery, upholstery, painting, metal work, and bikes.

Repair pod activities will be managed by qualified trainers, working in partnership with third sector organisations to employ and train local people in skills for the green economy. The Hub will also be a space where people come together, with an open-plan events area to host workshops, visits, conferences and meetings. The venue is expected to open in 2022.



CASE STUDY



ESA Member:

FCC

Project:

**Realising the re-use
revolution**

Location:

Wigan/Hull/Wiltshire

Milestone:

**Launching new re-use
initiatives**

Date:

Throughout 2020



During 2020, FCC Environment and its council and charity partners managed COVID-safe re-openings of all of its reuse shops as well as launching initiatives to recover old garden tools for reuse in Wigan; opening an innovative new shop aimed at boosting the reuse of unwanted, but good quality, domestic appliances in Hull and launching an initiative in Wiltshire to recover and upcycle white goods for those in need.

In addition, last year, FCC conducted detailed research into public views on reuse, finding that most people like to buy second-hand items and many do so regularly - while some of the same people regularly use their local HWRCs and want to be able to buy second-hand items when they visit.

ESA Treasurer's report 2020/2021



Neil Grundon
Treasurer of the Environmental
Services Association (ESA)

The year ending March 2021 saw a robust financial performance for the Association as we generated a surplus of around 6% on income. ESA always aims to meet a balanced budget and, despite the uncertainties created by the covid pandemic, this objective was comfortably met again this year. In fact, the pandemic demonstrated the value of the Association, as we helped our Members steer their way through a period of significant uncertainty requiring rapid responses to the fast-moving changes on the ground.

As a consequence of this, ESA's income rose marginally from the previous year, while outgoings were reduced as pandemic restrictions led to a significant switch to online meetings and events reducing costs in this area. It now feels as though ESA and the industry have weathered a particularly turbulent and unprecedented time for wider society and the economy.

ESA's reserves have grown steadily since a low in 2015 and have increased by a further 12% combined over the past three years, placing the Association in a strong position to be able to absorb any short-term adverse circumstances.

Looking forward, new policy drivers resulting from the implementation of the Government's Net Zero and Resources & Waste Strategies should create a strong and supportive economic climate for the industry, thereby helping to maintain stable membership revenues for ESA in the future.

The outlook for the Association remains positive with continued opportunities for expansion in the Membership base. The value of the Association should be enhanced as it supports the industry through the forthcoming period of radical policy

and regulatory change during the next few years. Continued industry consolidation could however provide a drag on future subscription income, which may require ESA to review its subscriptions - which have now been frozen for over a decade - in the year ahead.

ESA's stable finances enable the Association to push a proactive agenda on behalf of its Members, increasing our influence as we push for more recycling, less carbon and higher standards across our industry.



ESA members and working groups

Full members as of 4th November 2021

Albion Environmental	Enva
Augean Landfill	FCC Environment (UK) Ltd
Axil Integrated Services Ltd	Fortis IBA
Barr Environmental Ltd	Grundon Waste Management
Biffa Waste Services Ltd	Hills Waste Solutions Ltd
Bioenergy Infrastructure Ltd	Indaver UK Ltd
Bioenergy Infrastructure Ltd	Johnsons Aggregates and Recycling Ltd
Blue Phoenix UK Ltd	Levenseat Ltd
Bouygues E&S Contracting UK Ltd	LondonEnergy Ltd
BPR Group Ltd t/a Paper Round	Malary Ltd
Bristol Waste Company	Max Recycle
Brockwell Energy Ltd	MDJ Light Bros (SP) Ltd
Bywaters Ltd	MJCA
Castle Environmental	Northburn Oils Ltd
Cirrus Environmental & Planning Consultancy Ltd	N+P Recycling Group Ltd
CNIM UK Ltd (MES Environmental)	NWH Waste Services
Cobalt Energy Ltd	Olleco
Cory Riverside Energy	Re-Gen Waste
Covanta Energy Limited	Reigart Contracts Ltd
Coventry & Solihull Waste Disposal Co Ltd	REMONDIS
Cumbria Waste Limited	Renewi plc
CWM Environmental Ltd	Resource Efficient Solutions LLP
Day Group Limited	SafetyKleen
Dunton	Scanmetals (UK) Limited
EMR Group	Serco Group plc
enfinium	Slicker Recycling
	Smiths (Gloucester) Limited
	Stantec UK Ltd
	SUEZ recycling and recovery UK

Thompsons of Prudhoe (Formerly
WM Thompson)
Totus Environmental
Tradebe UK Limited
Veolia Environmental Services (UK)plc
Viridor Waste Management Ltd
VitalEnergi
WasteCare
Windsor Waste Management Ltd
WRc plc
Wyllie Recycling Limited
Zest Recycle Ltd

**Associate members as of 4th
November 2021**

Ahk
Arden Equipment UK Ltd
Avertas Energy (Macquarie)
Bauer Analysis
Brian Harding Environmental Ltd
Clyde & Company Claims LLP
CMS Cameron McKenna Nabarro Olswang
LLP
Cullum
Davidson Chalmers Stewart
Dentons UK and Middle East LLP
Direct Insurance Group
Ecosurety
Environment Exchange, The
Fichtner Consulting Engineers Ltd
Green Investment Group Limited
Gunnercooke LLP

Icon Infrastructure
Iona Capital
Isys Interactive Systems Limited
Kooi
Oil Marketing Services
Osborne Clarke
Pinsent Masons LLP
Plan B Management Solutions Ltd
PricewaterhouseCoopers LLP
REPIC
Ricardo Energy & Environment
Royal Haskoning DHV
SLR Consulting Ltd
Smart Solutions Recruitment Ltd
SRG
Tolvik
Uniper Technologies Limited
Vismundi Ltd
Walker Morris LLP
Wardell Armstrong LLP
Wastepack Group Limited

ESA working groups and committees

The ESA convenes a number of groups comprising subject-matter experts from member organisations, as well as contributors from outside of the ESA membership where appropriate. The working groups are responsible for delivering key activity aligned with the organisational strategy. As of March 2021, the working groups are as follows:

- Biotreatment
- Climate Change
- Collections
- Communications
- Communications Strategy Group (CSG)
- Dry Recyclables
- Energy from Waste (EfW)
- Fire Prevention Plans
- Heat Networks
- Waste Incineration BREF
- Financial Issues
- Hazardous Waste
- Health & Safety Committee
- Health & Safety Strategy
- Landfill
- Li-ion Batteries
- Planning
- Regulation
- Resources and Waste Strategy
- Biodiversity
- Social Value
- SESA Committee (Scotland)
- SESA EfW
- Tax
- Waste Oils
- WEEE
- WESA Committee (Wales)

Environmental Services Association Team

Jacob Hayler

ESA Executive Director

Jacob joined ESA from the City in 2005 as an economist and in January 2015 he was appointed as ESA's Executive Director, responsible for strategy and the day to day running of the Association. Jacob has represented the industry on multiple government advisory bodies and committees and is the UK's representative on various pan-European waste and recycling industry bodies.



Sam Corp

Head of Regulation

Sam leads on a wide range of regulatory initiatives within ESA, including the sectors' role in tackling waste crime. He is currently managing the 'right Waste, right place' campaign to raise awareness of waste Duty of Care. As WESA co-ordinator, Sam is also involved in the establishment of waste and recycling policies in Wales.



Stephen Freeland

Policy Advisor/Scottish Environmental Services Association (SESA) Coordinator

Stephen's role as policy advisor is to help inform the development of H&S and environmental policy on behalf of the industry. As SESA co-ordinator, Stephen looks after policy, regulation and engagement with the Scottish Government.



Charlotte Rule

Climate and Energy Policy Advisor

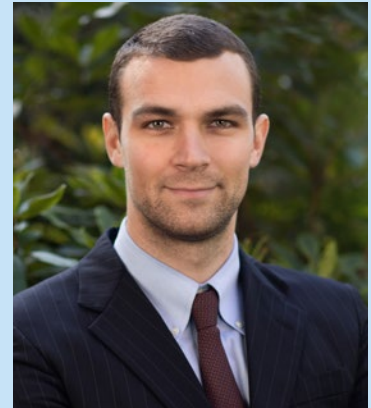
Charlotte is responsible for policy relating to the ESA's Net-Zero commitments and energy from waste. She seeks to promote policy in three key areas to ensure the sectors' decarbonisation roadmap is achieved: increased recycling, decarbonising non-recyclable waste treatment, and transitioning vehicles and fuel use to zero emission sources.



Julien Grolée

Recycling Policy Advisor

Julien is the ESA's point of contact for dry recyclables and biowaste policies. He is also in charge of the development of WEEE regulation.



Toni Waters

Communications and Membership Officer

Toni manages the ESA communications channels with trade and national press, social media and member companies. She also manages all full and associate ESA Membership applications, and is the main point of contact for member companies.



Anita McCarthy
Office Manager

Anita manages the ESA reception and the meeting room bookings. She is the first point of contact at ESA. She is hands on with the day to day running of the offices and assists the Policy Team when required with administration.



If you would like to find out more about the Environmental Services Association, please visit **www.esauk.org**

For membership enquiries, please contact **Toni Waters** by email at **t-waters@esauk.org**

If you would like to find out more about the
Environmental Services Association, please visit
www.esauk.org

 **[@ESA_tweets](https://twitter.com/ESA_tweets)**



www.esauk.org