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The community waste sector and waste services in the UK: current state and future prospects

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The community waste sector and waste services in the UK: current state and future prospects

Abstract

Theory predicts that the voluntary or community sector will contribute a range of services that are not delivered by the state or private sectors. This paper examines the changing contributions of the community waste sector in the UK to reflect upon these claims. A rosy picture of the community waste sector is presented from research on the sector in 2002, with a growing number of organisations carrying out a range of services, drawing on multiple and diverse sources of funding. More recent evidence, and information drawn from outside the sector, however, suggests that regulation, competition, and changes to funding regimes are putting the sector under considerable pressure, such that it is likely to change, and that some parts of it will contract. In terms of the claims from theory, the paper finds evidence that the community sector can and has been innovative in the services it provides and the way that it provides them, though similar innovations may emerge from the private and public sectors. The sparse evidence on participation and recycling rates in kerbside and civic amenity sites are equivocal on whether the sector provides enhanced communication as theory would predict. Overall, the paper highlights the difficulty in achieving direct comparisons between the waste sectors without specific focused research for this purpose. It concludes that the challenge for European, national and local government is to influence the necessarily constructed waste markets in a way which will enhance rather than discourage service providers to innovate in the waste material collected, and to communicate effectively with the public whom they serve. Such policies promise to encourage the effective delivery of sustainable waste services from all three - public, private and community - sectors.

Keywords: Community, not-for-profit, voluntary, waste, recycling, innovation, participation, communication.

1. Introduction

The voluntary sector is widely acknowledged as performing important service functions in society and, in particular, as ‘filling gaps’; providing services when the public and private sectors fail to provide them. One area which has seen considerable voluntary or community input has been recycling and reuse within the waste sector. Recent ‘mainstreaming’ of recycling services is claimed by some to threaten the future of the community waste sector. This paper reports on research in 2002 which traced how the community sector was contributing to waste services. It also examines recent developments in waste legislation and service provision, considering what contemporary change in services might result. Together, this information enables the changing input of the community sector to waste services to be reviewed.

Writing in 1999, Murray traced three possible futures for the community waste sector, offering a framework against which to judge the empirical findings of this review. One perspective sees community organisations as *pioneers* in waste management that will be supplanted by larger private sector competitors over time (Murray, 1999: pp.65). The second suggests that they will be *sub-contractors* supplying the needs of large metal and paper reprocessors, that “are only too pleased if there are small locally connected schemes that can provide reliable flows of recyclable inputs” (Murray, 1999: pp.65). Finally, the third perspective suggests that Community Waste Projects (CWPs) may become a *significant part of the waste sector over the long term*. The latter is Murray’s favoured interpretation, suggesting that the values of community enterprises “support the small, the light-footed and the local” which “fit in well with household and neighbourhood services [required by some types of recycling]” (Murray, 1999, pp.66).

Underlying this review is a normative question of what role the community sector *should* play in a movement towards sustainability. One perspective argues that Murray’s *pioneer* and *subcontractor* roles are sufficient, and that the market should determine which organisations

deliver waste services over the longer term. This approach emphasises the need for rapid, efficient, universal and effective changes in environmental standards over any advantages of service diversity. The alternative perspective is that the community sector offers unique contributions which are not re-produced by the public and private sectors. In common with other research on the community and voluntary sector, this perspective would suggest that, 'the nonprofit form creates certain propensities or possibilities that encourage or allow these organisations to perform particular social roles more regularly than other types of institutions, such as businesses or state agencies' (Salamon *et al.*, 2000: pp.4, quoted in Kendall, 2003: pp.82). This approach would suggest that the market for recycling services should be framed such that community organisations can continue to compete to carry out these roles.

The tension between these two normative perspectives can be traced through this review. In Section 2 below we examine the contribution of the community waste sector to waste services in 2002. Structured through research on wider community sector social impacts, the section also presents the views of those working in the community waste sector with respect to the nature of these impacts. In Section 3, we review recent legislation and other research which provides some comparison between community and other waste service providers. This section enables us to explore which normative position is being taken by the UK Government, as well as examining some of the claims made about the community sector in the previous section. We conclude in Section 4 by reviewing alternative policy options and their consequences for waste services in the UK.

2. Services delivered by the community waste sector in 2002

2.1 Research design and method

The empirical material in this section comes from research on the nature and contribution of 'community waste projects' (CWPs). Community Waste Projects were defined in the research as

'not-for-distributed-profit organisations concerned with the minimisation, reuse or recycling of waste'. The research was conducted at the University of Bradford and funded by the Economic and Social Research Council (Grant R000223705), with additional funding from the Shell Better Britain Campaign. The project investigated the social, economic, environmental and community involvement achievements of organisations such as community recycling companies, furniture reuse projects, paint redistribution schemes, computer refurbishment projects and community composting groups.

The research drew on national and local surveys of CWPs, with nine in-depth case studies of particular projects. The national survey comprised distribution of questionnaires to the 195 full members of the Community Recycling Network (CRN), an umbrella organisation of community groups, co-operatives and not-for-profit businesses in the community waste sector. The survey was designed to elicit a broad array of information covering the objectives, activities, staffing, volunteer involvement and funding sources of CWPs. Local surveys of the full range of community waste projects in six selected local authority areas were also conducted to ensure that the investigation considered the scope of the community waste sector. The survey elements of the research were completed in May 2002, and achieved a combined response rate of 46 percent. The specific objectives of responding organisations were then used to identify nine contrasting CWPs for more detailed investigation. These case study investigations involved semi-structured interviews with project workers, members of management committees and volunteers. The detailed findings and methods (Luckin and Sharp, 2003a) of the project have already been reported elsewhere; the objective here is to reflect on their implications for the role of the sector within the wider waste management industry in the UK.

In outlining findings, the discussion focuses on three areas of the original research: first, the paper considers what waste services are offered by the community waste sector and how these contrast with the services offered by commercial or state competitors. Second, it analyses the

sector's size, growth trajectory and funding. Finally, the wider societal roles played by the sector are considered.

2.2 Waste services supplied by the community sector

Drawing on US experience, Salamon suggests that the not-for-profit nature of community sector organisations facilitates their fulfilling of particular social roles that are often neglected by the state and private sectors (Salamon *et al.*, 2000, quoted in Kendall, 2003: pp.92). One of the cited roles is the provision of services in spheres of activity where markets or governments 'fail'. Market failure is seen as occurring when the market is 'imperfect', for example, when waste producers do not meet the external costs of waste disposal. Government 'failure' occurs when a topic is not considered of sufficient weight to influence the ballot box, and thus a social need has escaped the state's consideration. Kendall suggests that 'even where sectors [i.e. voluntary, public and private] apparently co-exist in providing the 'same' services, the literature predicts differences below the surface' (Kendall, 2003: pp.93). These differences might include higher quality delivered by the community sector, because the lack of financial incentives avoids the incentive to reduce costs; the existence of 'stakeholder control'; greater responsiveness to need; lower costs, because of the use of volunteers; and capacity to specialise due to 'community embeddedness'. Kendall's description of the circumstances in which the voluntary sector delivers services raises questions about what waste services are delivered by the voluntary sector, and whether and how these services can be differentiated from those offered by the public or private sectors.

The research showed that CWPs deliver a variety of environmental services including kerbside waste collection, composting, waste education, management of Civic Amenity (CA) sites and schemes enabling reuse of particular elements of the waste stream such as furniture, white goods, IT equipment and paint. For instance, in the latter respect, the national survey showed that large numbers of projects were involved in reclamation of furniture or white goods (28 per

cent), IT equipment (20 per cent) and paint (20 per cent). Most of these services were offered alongside low-cost provision of the recovered and/or refurbished items to community groups or low-income families. Delivery of these services also frequently involved provision of training through the New Deal or Intermediate Labour Market schemes which cross-subsidise refurbishment and repair work.

In 2002, members of the CRN were responsible for the provision of kerbside recycling services to more than 1.5 million households, or six per cent of UK households (Let's Recycle, 25 March 2002). As 51 per cent of UK households were at the time covered by various types of kerbside recycling scheme (DEFRA, 2002), CWPs were responsible for approximately one-eighth of such provision. In addition, it should be noted that many local authorities run kerbside recycling on a commingled collection model, whereas all studied CWPs operate source-separated schemes. Commingled collection schemes often result in higher contamination rates of recyclable materials and therefore have fewer environmental benefits, as well as a less commercially attractive end product.

All the case study projects involved in kerbside recycling or the management of CA sites reported high recycling rates for material brought to CA sites, of around 40% or more. This was explained as a result of various factors including the relatively high numbers of waste streams into which waste brought to sites could be segregated, site design factors such as layout and signage, and the employment of knowledgeable and enthusiastic staff.

There were also significant numbers of CWPs involved in the collection of kitchen and garden waste, with 17 per cent of the organisations surveyed involved in composting of one or both of these waste streams. However, it should be noted, in focusing on the CRN, the survey did not access those CWPs most likely to compost. A separate network, the Community Composting Network had, at the time the research was undertaken, 130 members (see Luckin and Sharp, 2003b).

Finally, 84 per cent of projects were involved in educational activities of some sort, with 70 per cent reporting this area of activity as a key or major objective. More than three quarters of those undertaking educational activities were working directly with schools in various ways, whether it be through giving talks or, more directly, through establishing on-site recycling facilities.

In summary, the research demonstrated that CWPs are delivering a diversity of waste services. But to what extent are these services unique to the community sector? Table 1 draws on claims made in the survey and interviews to consider how CWP service provision can be differentiated from that provided by other sectors.

As Table 1 shows, CWPs compete with other sectors to provide the various waste services offered either through the provision of local authority contracts or in competition for grant funding. Case study interviewees identified three main factors that facilitated CWP success in such competitions. First, the voluntary nature of the community sector could mean that it is particularly effective in delivering services where the public is being asked to carry out an activity, for example, to sort their waste. Second, the community sector is often able to operate at a relatively low cost, and can also access streams of funding which are unavailable to other sectors. Finally, the community waste sector is able to marry related needs, for example, for training and for the repair of furniture, such that unrelated funding streams cross-subsidise each other.

2.3 Sector size and funding

It can be estimated on the basis of the national and local surveys that the total number of organisations making up the community waste sector – including groups that are not members of national networks – lies between 850 and 1,000 (Luckin and Sharp, 2003a). The national survey suggested considerable growth within the sector in the late 1990s (see Figure 1). In practice the situation may be more complex, as a one-off survey does not indicate the number of projects

established in earlier periods that have since ceased trading. Nevertheless, these figures do suggest that at the time of the survey the sector was well established and growing.

Many CWPs have expanded the geographical scope of their operations and changed from small-scale localised organisations operating within one local authority district to regionally, or, in a few exceptional cases, nationally active bodies. However, despite this trend, the great majority of CWPs remain relatively small in terms of turnover and staffing levels. As Figure 2 shows, of the 64 (77%) survey respondents that employed full-time staff, only 10 (12%) had more than 20 full-time staff, and only one had more than 100 full-time staff.

With regard to income sources for the projects, Figure 3 indicates that the CWPs responding to the national survey obtain their income from a diversity of sources. The most frequently cited source of income was sale of materials, from which 65 per cent of responding projects were obtaining some of their income. Other prominent sources of funding included the Landfill Tax Credit Scheme, regeneration funding and local authority recycling contracts.

Diversity of sources of income was also illustrated by the numbers of different categories of funding accessed by individual projects. Only 14 per cent of projects were reliant on a single source of income. Indeed, over two-thirds of responding projects received income from three or more of the categories represented in Figure 3, with a quarter receiving income from five or more different categories. This diversity shows that many CWPs are relatively stable in terms of funding, although a minority are heavily reliant on a limited number of sources.

Survey respondents were also asked to indicate the proportions of their income that they obtained from the various categories, and over 85 per cent of responding projects provided these details. In brief, 23 per cent of projects were obtaining at least 80 per cent of their income from what can be regarded as commercial operations (sales of materials, commercial contracts, local authority contracts and recycling credits – all of which are commercial in the sense of rewarding

the CWP according to the amount of 'product' delivered). In other words, many CWPs are competing successfully with commercial firms in the waste management sector. The case study investigations corroborated this point, and also revealed a desire among several organisations relying more on grant and project funding to increase proportions of commercially generated income. However, the survey also showed that 23 per cent of responding projects were not obtaining any income from commercial sources.

It should be noted, however, that the differences between income earned through contracted services and grant funding are not entirely clear-cut. Grant funding does not come without strings attached, and recipient organisations must respond to rigorous criteria and meet challenging targets, just as they would under, say, a contract to provide a local authority with recycling services. One case study project manager noted that:

I tend to want us to look at all [funding] as contracts, whether it's a small project or a big project, because we're being asked to deliver specific outputs in every single case.

In summary, the research showed that the community waste sector is relatively well established, with both overall numbers of organisations in the sector and individual organisations apparently growing, and significant numbers of these exhibiting considerable financial sustainability.

2.4 Non-waste related roles played by the sector

Alongside service provision, voluntary sector organisations may also offer an additional advantage over other sectors through co-producing other voluntary sector roles, including the provision of non-waste services relating to innovation, advocacy, expressing voluntarism, developing leaders and building communities (Kendall, 2003). Table 2 below draws on the research to summarise the extent to which CWPs were delivering these contributions to society.

In one of the areas discussed (community building) evidence is drawn solely from the case study elements of the research: in this respect, the results should be regarded as indicative.

As Table 2 demonstrates, in addition to the waste service role, CWPs are delivering important benefits through non-waste related services and in terms of advocacy, community expression and innovation. These sorts of contributions are very unlikely to be made by non-voluntary sector organisations when delivering waste services.

2.5 Summary

This section has described a robust and diverse community waste sector. The sector delivers many important waste services – for example, kerbside recycling, and the re-use of unusual waste streams. Some services are uniquely delivered by the community waste sector; in relation to others, its community status appears to enable the sector to compete successfully with public and private sectors, conferring advantages due to public preferences, funding regimes and greater responsiveness to consumers. The research also indicated that the sector is relatively vibrant and that many CWPs are financially sustainable. Finally, it is clear that the sector is delivering other benefits to society including non-waste related services, advocacy, community expression and innovation functions.

Overall, the investigation can be summarised as presenting a rosy picture of the community waste sector. The investigation, however, was a snapshot of the sector at a particular point in 2002. Moreover, the survey was one dimensional, in terms of considering only the state of the sector as it was considered by sector workers themselves. Recent developments give greater longitudinal understanding of the sector, as well as offering comparisons with other sectors; together, they imply a rather less certain and more complex future for CWPs. Drawing on a combination of legislative documents, other research, and the trade press, these developments are discussed in Section 3.

3. Recent developments for the community waste sector

3.1 Changing nature of waste services in the UK

In 2003-04 the UK recycled 17.7 per cent of household waste. Although this represents an upward trend, rates of 45-60% were achieved by some European neighbours in previous years (DEFRA, 2004a; Hogg and Mansell, 2002: pp.17). Since 2000, a developing body of EU legislation has forced the rapid development of new waste policies and practices in the UK (DETR, 2000; Strategy Unit, 2002b). The most important of these is the EU Landfill Directive which requires that the amount of biodegradable municipal waste disposed of in landfill must be progressively reduced to just one third of its 1995 quantity by 2020. In response to these requirements, the UK Government has introduced a number of measures including targets for recycling and a landfill tax allowance trading scheme. As Table 3 below indicates, these new measures are likely to have a significant effect on the areas of recycling and re-use.

The overall effect of the new instruments listed in Table 3 are that demand for recycling services is greater, and that the financial returns to organisations delivering them are more secure. These effects result both because local authorities will buy more recycling services, and because markets for recycled goods are becoming more reliable. At first glance, more secure returns for recycling should be good for community waste projects – after all, their core business is at last to be given the financial rewards that it deserves. The irony is that greater financial returns mean that recycling has become a more commercially attractive activity. Increasingly, therefore, the community sector is competing with the private and public sector for the right to deliver these services.

3.2 Impact of changes on community waste sector

In the 1990s unreliable financial returns meant that if community organisations could make recycling or re-use pay in a particular locality, local authorities were happy to let this occur on their patch, and many such community organisations emerged (Entwistle, 1998). In contrast, the new requirements now mean that local authorities need to provide co-ordinated and consistent kerbside and other recycling services throughout their districts. Potential waste service operators are required to submit tenders to demonstrate how their operations can meet these requirements, and local authorities select between tenders according to the legal concept of 'best value'. Contracts increasingly run for periods of between 20 and 25 years, and many also require single companies to provide an integrated service covering all waste management services (recycling collections, CA site management, residual waste collection, street cleaning services).

The attributes that enabled successful CWPs to develop – the ability to spot local needs, the combination of different forms of finance, the provision of high quality localised services – do not necessarily mean that they will be in a position to compete in legalistic tender processes. In particular, many CWPs do not have the capital or management capacity required to provide waste management services, or even just recycling collections, across an entire local authority district. Some are unable to meet the required turnover threshold needed to tender, while EU public tendering requirements eliminate others which are in receipt of capital grants from government. Finally, while the rules covering 'best value' specifically allow local authorities to take account of social and economic benefits in addition to cost in developing tender specifications, it is rare that authorities exercise this right (Newman, 2004: pp.10). The implications of these changes for the sector were brought home when the pioneering Avon Friends of the Earth went into receivership in August 2003 (Let's Recycle, 2003). Reviewing recent developments, the Programme Director of the government's Waste Implementation Programme suggested in 2004 that the community sector would split into two parts: one that competes commercially for local authority contracts, and another that contributes innovations and passes on its skills to other sectors (The Waste Paper, 2004a). Evidence to date is that there is one large community service provider – ECT recycling – which has been able to compete with

private sector providers and currently delivers recycling services in 15 local authority areas (ECT, 2005). It is possible that other large community sector providers will yet emerge, probably from the 10 organisations with more than 20 full time staff listed in Figure 2 above. Otherwise, most community sector providers can be seen as fitting into the more precarious second role.

If these institutional changes mean that kerbside and CA site provision are increasingly difficult for the community waste sector, what of the recycling of unusual waste streams and composting? Recent and forthcoming legislative changes mean that there is considerable uncertainty around these fields of activity. The loss of landfill tax credit scheme funding means that there is less money available for community sector innovation in this field. In addition, the lottery funded Community Recycling and Economic Development (CRED) scheme has focused quite specifically on the tonnages of material recycled by community sector activity rather than the nature of materials recycled. Increased funding for local authority efforts to increase recycling may, however, lead to funding for service provision filtering through to CWPs. Moreover, all CWPs will in future receive payment of recycling credits to reflect the money that their activities save local authorities in disposal costs. These payments are to be made mandatory by the April 2005 adoption of legislation in the Clean Neighbourhoods and Environment Act.

In addition to these funding issues, legislative changes mean that waste handling is becoming more closely regulated, and thus it is becoming more difficult for small community operators to function. For example, in the field of waste electronic goods, the WEEE directive is likely to lead to a growth in retailer take-back schemes, increased involvement of commercial operators, and accreditation requirements for those CWPs that remain involved (Lets Recycle, 28 October, 2004; Lets Recycle, 14 September, 2004; ICER, 2004). However, the government has recognised the potential impact of the regulations on reuse of appliances through community sector activity, and the sector will be represented on a task force that is to be established to monitor this impact (DTI 2005). Moreover, the Furniture Reuse Network is working to develop regional Appliance Reuse Centres that it intends will facilitate increases in reuse under the new regulations (FRN 2004)

Finally, community groups involved in composting are subjected to animal by-products legislation which means that kitchen waste must be subject to high temperature processes, requiring expensive equipment and high tonnage collections. Smaller composting units also need to apply for expensive Waste Management Licensing exemptions (Lets Recycle, 5th October 2004). Of the 'unusual' waste streams discussed in section 2.2, only furniture re-use remains relatively unaffected by these changes. Overall the combination of threats to funding streams and changes to regulations, means that many CWPs involved in composting or reuse of waste streams such as paint or WEEE will have to tailor their activities to the new situation, which may be a serious challenge for some.

A final area for consideration is waste education; this is an area which is particularly important for waste services which require an investment of effort from the public, for example, when people are being asked to sort their waste. In 2002, our research found that most CWPs were delivering waste education in a way that was integrated with their waste services, and interviewees argued that the public was more responsive to their messages than those from private or public operators. This claim has some support from environmental psychology research which highlights how recipients are much more likely to act on a message if they perceive the source organisation as credible and trustworthy (Kempton *et al.*, 1992). It could also be argued that locally based community or public providers will have more long term interest in the waste behaviour of the local population than 'visiting' private sector operators.

Since 2004 the Waste Resources Action Programme (WRAP) has developed a new nationwide campaign on waste – Recycle Now – which includes a national television advertising campaign promoting recycling (Recycle Now, 2005). In addition, the spread of kerbside recycling means that more people are subject to specific local messages relating to their local schemes. Against this, the arguments above suggest that where a CWP kerbside service has given way to commercial operators, there may be less incentive for provision of waste education. However, in some locations specific requirements for waste education may be specified within the tender

document, or split off and offered as a sub-contract. Such sub-contracting may be effective if the education and delivery are linked through a joint commitment to service review and improvement; but less so if the two services operate at arms length.

3.3 Data on kerbside and CA site provision

At the time the research reported in section 2 was undertaken, CWPs were providing kerbside collections to 6% of UK households, accounting for approximately one-eighth of all such provision. Moreover, interviewees suggested that the community sector offered a superior service to the public or private sector because, first, they used source separated methods which produced a better quality recycle and, second, they were able to achieve higher participation rates. Similarly, the research reported in Section 3 showed that 15 of the 83 (18%) respondents to the national survey were involved in the management of CA sites, and that they all reported relatively high recycling rates at these sites. Recent surveys provide some empirical information to contextualise these claims.

A survey of local authorities' kerbside collection services conducted by Friends of the Earth in 2003-4 (FoE, 2004) validates the claim that CWPs are a significant player in delivering kerbside collections services across Britain, finding that 15% of Councils in England and Wales have kerbside collections that are completely or mainly delivered by a not-for-profit provider (see Table 4). Second, while the FoE survey validates the claim that the vast majority (51 of 54 services provided, or 94%) of collections delivered by not-for-profit providers use source-separated recycling, it also shows that many private and in-house providers deliver similar services. Of the 138 kerbside collections delivered by private sector companies, 64% were source-separated, while 59% of in-house collections were source-separated.

The FoE survey also provides some evidence that CWPs are not the only organisations that can deliver high participation in kerbside recycling schemes. In FoE's assessment of 'ten of the best

doorstep collections in England', participation rates of 80-90% are reported for Lichfield's in-house scheme, while the highest rate cited for a not-for-profit provider is 74% for the scheme provided by ECT Recycling in Vale of the White Horse (FoE, 2004). No private sector operator is reported as delivering similar order participation rates.

A recent survey of practices at CA sites, the *National Assessment of Civic Amenity Sites* (Cameron-Beaumont *et al.* 2004), provides the average recycling rates achieved by a range of different management structures. As Table 5 shows, the average rate achieved by the community sector managed sites is relatively high, especially given that it is based on sites operating in exclusively urban areas where less garden waste is deposited at CA sites. However, the sample size for community sector sites was only two, the results were not found to be statistically significant (Cameron-Beaumont *et al.* 2004, p.139) and a slightly higher average was in any case achieved by small/ regional companies managing sites directly.

Moreover, the data also showed that high recycling rates can be achieved at CA sites managed by organisations other than community waste projects. Indeed, the individual case studies presented by Cameron-Beaumont *et al.* (2004, pp.142-143) show both public and private sector operated CA sites which achieved recycling rates of over 50%.

In summary, the data in this section confirms some findings of section 2, showing that CWPs are a significant albeit minority provider of kerbside and CA site services. The most interesting findings relate to the claimed advantages of CWPs in the delivery of these services. In contrast to the expectation of some community sector workers, it is clear that source separated recycling can and is delivered by operators of all types. Similarly, high participation in kerbside schemes was observed in schemes run by both public and community operators. In CA sites indicative information suggests that the community sector achieves similar recycling rates to those of small or regional private sector operators, and higher than those managed by many local authorities or large commercial providers. Overall, it is clear that high participation and diversion rates can be

achieved in recycling services managed by all types of organisation. Evidence with respect to average recycling rates achieved by the community sector in kerbside schemes and at CA sites is sparse; therefore, while community organisations may achieve slightly higher rates than other types of organisation, this remains unproven.

3.4 Summary

Table 6 summarises the above discussion, showing how recent developments impact on the areas of waste services previously delivered by CWP. It is clear that prospects are extremely uncertain in many areas of CWP provision, as a result of the direct and indirect impacts of recent legislative and regulatory changes. Table 6 also reviews the effect of the changes on the overall quantity and quality of services in each area. While the loss of community sector provision may imply significant local losses of high quality services, overall, recent developments are likely to mean clear gains in terms of the quantity of reasonably high quality services provided.

4. Conclusions

The picture of the community waste sector emerging from section 3 is very different from the rosy account of the sector from the 'snapshot' survey in 2002. A combination of regulation, competition, and changes to funding regimes appear to put the sector under considerable pressure. Some organisations have already gone out of business, and as previous contracts and grants go out of date, more are likely to do so. In these respects the pattern described conforms to the 'pioneer' thesis described by Murray (1999). However, there are three respects in which the disappearance of the community sector that this thesis would predict is unlikely. First, it is clear that at least one community sector organisation is successfully competing with the private sector for the provision of recycling services. Second, in relation to furniture, white goods, as well as emerging areas of waste service provision, the community sector clearly still

has a role to play. Third, depending on local authority contract requirements, particular community providers may be able to continue to offer elements of waste services in specific localities. Overall, the future community waste sector is likely to be significantly smaller than that described in 2002; moreover, the sector may already be splitting into two parts. A few larger organisations may be able to compete for 'mainstream' local authority contracts; the majority of smaller ones will deliver niche services, and may be dependent on local authority goodwill in terms of splitting contracts into parts, and specifying additional social and environmental benefits required.

The latter point highlights the difficulty of applying any form of 'free market' philosophy to the waste sector. Driven by a range of regulatory requirements, supported by funds from a range of government sources, and dependent at the local level upon contracts written by local government officials, the market for waste services is entirely constructed. As section 3 has demonstrated, recent choices made at a European, national and local level are currently having the effect of reducing the scope and opportunities for community providers to compete for the provision of waste services. More small non-integrated contracts and more recognition of wider social and environmental benefits could slow or reverse these effects. But should national and local government make such moves to support the community sector? Answers to this question relate to the normative tension highlighted in the Introduction.

This paper has presented some comparisons between the public, private and community waste sectors. While section 2 demonstrated that the community sector can be innovative in the services it provides and the way that it provides them, it is not clear whether similar innovations will emerge from the private and public sectors. In particular, and as Section 3 has argued, the community status of CWPs could make them more credible, and thus may make the public more receptive to their messages. Despite this prediction from theory, the sparse evidence on participation and recycling rates in kerbside and civic amenity sites is equivocal. Overall, the

paper highlights the difficulty in achieving direct comparisons between the waste sectors without specific focused research for this purpose.

Over and above the benefits arising from specific management structures, two themes have emerged as important features of effective recycling services. The first theme is the ability to innovate through identifying and pursuing new opportunities in terms of new waste streams or new means of addressing existing waste streams. The second theme is organisations' ability to communicate effectively with the public and to stimulate their co-operation and participation in waste services delivered. The challenge for European, national and local government is to influence the necessarily constructed waste markets in a way which will enhance rather than discourage these characteristics in service providers. Large integrated waste management contracts necessarily limit the number of organisations able to tender, restricting the room for innovation, and the space for detailed understanding of local needs and preferences to inform communication methods. Contracts which are split into smaller parts could allow a range of organisations to present innovative ideas for service delivery, including communication methods and the delivery of additional social or environmental benefits. In this respect, the same changes which may favour the community sector would also favour small private sector operators, or successful local authority providers. Thus, without 'biasing' the contracts towards community sector providers, such changes would ensure that innovation could be recognised and harnessed to maintain dynamic and flexible approaches to waste service provision in the UK.

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Table 1
CWP services: competition and specialisation

Service area (% of CWPs delivering)	Other provision?	CWP niche/specialism
Kerbside collection (24% of surveyed CWPs were providing kerbside services).	Yes – private and state sector. Approx. 12% of provision by CWPs.	CWPs deliver source separated recycling that requires higher quality community participation and delivers a better quality recycle. CWPs report relatively high participation rates.
Re-use or recycling of unusual waste streams (40% of CWPs involved) ^a	Yes – some private sector action, but varies with waste stream.	Recycling/reuse of specific waste streams are marginal in terms of funding, and benefit from voluntary sector access to grant funding, or cross subsidies from training contracts.
Management of civic amenity sites (18% of CWPs)	Yes – state and private sector	CWPs report relatively high recycling rates for CA materials, due to separation of high numbers of waste streams; good layout and signage at sites; and knowledgeable staff
Composting (17% of CWPs) ^b	Yes – increasing numbers of large-scale kerbside collections of garden waste; large-scale centralised composting facilities.	Relatively small-scale local-level schemes in which compost produced is re-sold close to point of waste generation.
Waste education (84% CWPs have educational activities)	Yes – delivered by many public and some private sector bodies involved in collection of waste. However, greater emphasis by community sector.	Voluntarism means that community sector education may have more impact. Often coincides with provision of a waste service – and is thus focused on specific actions that enable the service to function effectively.

a. The figure of 40% refers to the proportion of surveyed organisations that were involved in collection of either white goods, IT equipment or paint. Many of these organisations collected two or more of these waste streams.

b. It should be noted that the main network on which the survey was based was the CRN, the most diverse of the national networks in the sector. A separate network, the Community Composting Network had, at the time the research was undertaken, 130 members (see Luckin and Sharp, 2003b).

Table 2
Voluntary sector contributions to well being (after Kendall, 2003: pp.93-4)

Area of contribution – from Kendall	Examples of potential CWP contributions	Extent of activity observed through research
(Non- Waste) Service role: Geared towards areas where markets and government 'fail'.	Delivering non-waste services such as training to long-term unemployed; provision of low cost furniture to low-income families; work placements for people with learning disabilities.	Training – more than 40% of CWPs. Goods to low income families – more than 35% of CWPs
Innovation Role: The community sector is envisaged as fulfilling in the public sphere the same role as small businesses play in the private sphere.	Innovation in collection method and in materials collected, eg Collection of unusual waste streams; use of Pedestrian Controlled Vehicles (PCVs) to collect recycling in densely populated areas.	Recovery of unusual waste streams – 40% of CWPs involved (see Table 1). One case study organisation using PCV for collections.
Advocacy Role: Voluntary organisations link individuals to the broader political process	CWPs campaign for new or different waste policies, contribute to waste networks, also lobby policy-makers locally and nationally.	Most organisations make some contribution to local governance but it is generally not a primary activity.
Expressive role: Voluntary sector organisations promote citizen participation, and protect interests of social, religious, cultural or other minority groups.	CWPs attract volunteers to participate in delivery of waste services within their local community	Volunteer involvement a key feature for many CWPs: 82% of projects involved volunteers, with average of approx.16 volunteers per project
Leadership development: Voluntary groups encourage involvement in community activities and enable new community leaders to emerge.	Community members may become involved in management of CWP.	Limited evidence of local people contributing to CWP management – e.g. it is often hard to find local people to serve on management committees (Luckin and Sharp, 2004).
Community building role: The sector contributes not just to diversity reinforcement, but to social and political integration too.	The provision of low cost recycled furniture is a demonstration of social solidarity, but will not necessarily contribute to community-building. However, the premises of CWPs, especially those involved in re-use, may act as spaces for greater social interaction within communities.	Provision of furniture a key goal of many CWPs. However, limited evidence of community building – one case study organisation reported community links developing between trainees and families when collecting low-cost furniture.

Table 3
Recent measures to address waste policy in the UK

Development	Description	Probable impact
Recycling targets for local authorities	Local authorities are now required to meet particular targets for recycling and composting by 2010 and 2015. More stringent central government oversight of local services will result for authorities failing to meet targets (DETR 2000).	Strong regulatory incentive for local authorities to improve the extent of recycling in their area, either through purchase or provision.
Landfill tax accelerator	Landfill tax currently £15/tonne but government has indicated rise to £18/tonne in 2005-6 and by £3/tonne/year thereafter until £35/tonne (HM Treasury 2002).	The increasing cost of landfill will reduce the relative costs of recycling, making this a more economically attractive option for local authorities and businesses.
The Waste and Resources Action Programme (WRAP)	WRAP set up in 2001 to develop markets for recycled material, and has recently been asked to also take on the government's waste awareness campaign (The Waste Paper, 2004b)	If successful, WRAP will provide larger and more stable markets for recycle, as well as greater use of recycling facilities by the general public. Again, recycling becomes more financially viable.
Review of landfill tax credit scheme (implemented 2003)	Landfill tax credits are no longer available to community recycling schemes, with the funding channelled into municipal recycling, e.g. through DEFRA's Challenge Fund. New but smaller CRED (Community Recycling and Economic Development) lottery fund available to CWPs.	Enhanced funding for local authority recycling schemes. Reduced access to funding for CWPs.
Household Waste Recycling Act	Kerbside collection of two materials must be in place by 2010, although there may be some flexibility in circumstances where this would be very costly, eg remote rural areas.	Strong regulatory incentive for Local authorities to improve the extent of recycling in their area, either through purchase or provision.
Review of recycling credits	Financial benefits that accrue to local authorities through third party recycling and re-use are to be distributed to third parties following adoption of the Clean Neighbourhoods and Environment Act in April 2005.	The activities of CWPs will be better rewarded.
Landfill Allowance Trading Scheme	Increasingly challenging targets for reduction of landfilling. Greater flexibility through trading, banking and borrowing of allowances. Severe financial penalties for failure to meet targets.	Strong financial incentives for local authorities to reduce landfilling of biodegradable municipal waste.

Table 4
Organisations and type of recycling delivered^a

	Private sector company	In-house	Not for profit	Totals
Co-mingled	50	72	3	125
Source separated	88	104	51	243 ^b
Totals	138	176	54	368 ^c

a. Data collected by Friends of the Earth, but compiled into the above form by the authors. Where more than one organisation is collecting recyclables, then the Council is classed according to the contractor delivering to the largest number of households.

b. Friends of the Earth note that this figure is currently inflated because single material collections are categorised as source separated. As authorities move towards the collation of more than one recyclable, some authorities where single material collections that are currently described as 'separated' may move to a co-mingled system.

c. Includes authorities in England and Wales, excepting 6 authorities with missing data.

Table 5
Relative performance of different CA site management systems

Management organisation	Sample size	Rural	Urban	Average recycling rate %
Large/ Multinational	31	9	22	34.2
Small/ Regional	27	6	21	40.2
Small/ Regional (managed by totters) ^a	20	4	16	32.2
Local authority	33	4	29	28.3
Community sector	2	0	2	39.1

Source: adapted from Cameron-Beaumont *et al.* (2004, pp.139)

a. Totters are defined as an individual, or collection of individuals, who have the salvage rights to a CA site, in addition (in some cases) to receiving a management fee (Cameron-Beaumont *et al.* 2004, p.137).

Table 6
Summary: Impact of recent developments on waste services provided by CWPs

Service area	Relevant recent developments	CWP future provision	Effect on service quantity/ quality
Kerbside collection	Increased regulatory and financial incentives for recycling and consequent increased provision.	Some CWPs will compete successfully for local authority tenders but others will be crowded out.	Legislation requires increased quantity & quality of provision – local decreases in quality also possible.
Re-use or recycling of unusual waste streams	Complex changes to funding regimes. Potential reform of recycling credits. Increased regulatory control of waste streams.	Ongoing availability of funding for much CWP activity. Need for increased formalisation and demonstration of regulatory compliance.	Quantity and quality of services delivered to increase for WEEE, for all providers.
Management of civic amenity sites	Increased regulatory and financial incentives for recycling and increased contractual incentives for operators to increase recycling rates.	Some CWPs will compete successfully for local authority tenders but others crowded out, especially where all waste services delivered by single contractor.	All operators likely to increase quality and, where sites sparsely distributed, quantity of provision.
Composting	Increased regulatory and financial incentives for local authorities to organise district-wide collection and composting of organic wastes. More stringent regulation of composting processes. Changes in funding regime.	Severe threats to much CWP activity in this field, especially regarding kitchen wastes.	Increased quantity of service provision. Loss of local-level CWP schemes may imply decline in service quality, and treatment of waste further from point of generation.
Waste education	Waste awareness funding allocated to WRAP.	Depends on tender specifications, extent of CWP success when tendering & whether sub-contractor role is available and developed	More and consistent messages from WRAP. Risk loss of effectiveness if messages are not tied to service provision and local circumstances.

Figure 1.

Date CWPs established (national survey, completed in 2002).

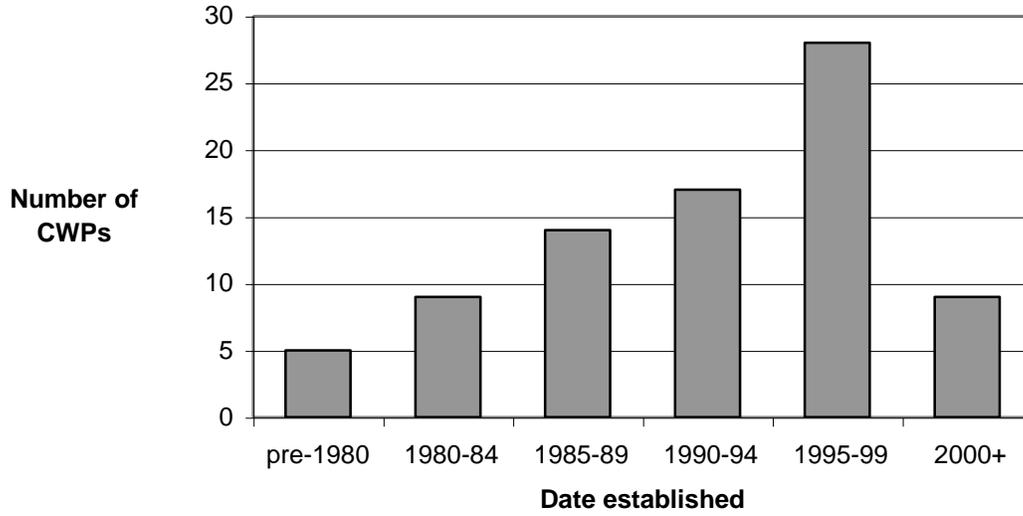


Figure 2: Staffing levels of CWPs (national survey)

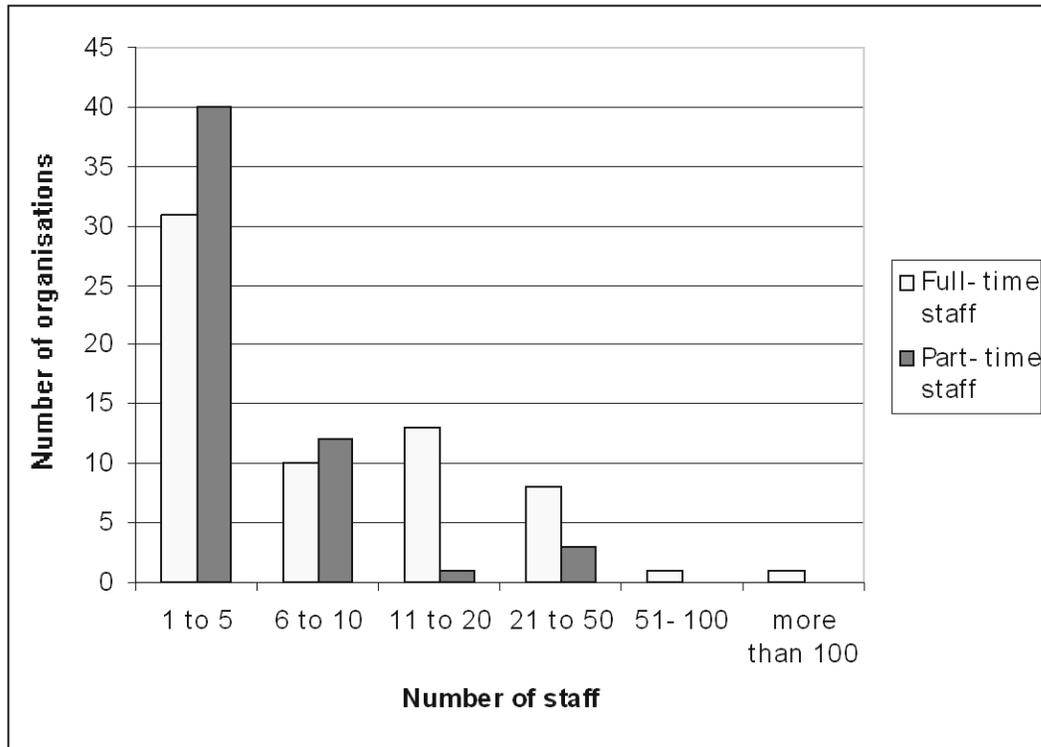


Figure 3. CWPs' sources of income and funding

