

FOR AN AMBITIOUS EU INDUSTRIAL STRATEGY

GOING FURTHER

#INDUSTRY4EUROPE

Joint Paper in reaction
to the Communication
of the European Commission on
"Investing in a smart, innovative
and sustainable Industry :
A renewed EU Industrial Policy Strategy"

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Europe is the cradle of the manufacturing industry and has been at the forefront of industrial revolutions and technological innovations. This industry directly employs over 34 million people across all Member States, in supply chains comprising hundreds of thousands of SMEs and larger suppliers. It also indirectly accounts for millions of additional jobs in related sectors.

The European manufacturing industry has tremendous capacity for research and innovation, boasts a skilled workforce and has earned a global reputation for quality and sustainability. What it now needs is the swift and determined support of the European institutions and the Member States to create more jobs and growth in Europe.

At the beginning of his mandate, European Commission President Jean-Claude Juncker identified the reindustrialisation of Europe as one of his top priorities and confirmed the objective of increasing the share of industry in the European GDP to 20% by 2020. As we approach the preparation of the next Multiannual Financial Framework, it is vital for the European institutions to act and help the EU remain a competitive global industrial power playing in a fairer world market.

Therefore, in February 2017, an impressive number of European industrial sectors adopted for the first time a Joint Declaration in which they called on the European Commission to adopt a long-term Action Plan to tackle the challenges that the industrial sectors are facing.

Member States and the European Parliament also clearly stated their full support for a strong European industrial strategy via the Competitiveness Council *Conclusions on a future EU industrial policy strategy* (29 May 2017), the Berlin Joint Declaration of the Friends of Industry (30 June 2017) and the Parliament *Resolution on building an ambitious EU industrial strategy* (5 July 2017).

As a consequence, we welcome the strong message of European Commission President Jean-Claude Juncker in his annual State of the Union address last 13 September as he stated: “I want to make our industry stronger and more competitive” and “help our industries stay or become the world leader in innovation, digitisation and decarbonisation”.

The Communication on “Investing in a smart, innovative and sustainable Industry – A renewed EU Industrial Policy Strategy”, published by the European Commission on that same day, is a first important step – which we welcome – as it puts industry back to a high position on the political agenda and provides a comprehensive overview of current and upcoming Commission’s initiatives and measures related to industrial competitiveness.

In the aftermath of this Communication, the Signatories of this Joint Paper – representing a wide range of industrial sectors – have come together to analyse the document and react by identifying key objectives and/or missing measures that should be at the heart of any ambitious EU industrial strategy, taking the Communication as a starting point

More than ever, we are ready to step up our cooperation with the European institutions to discuss and implement a long-term European industrial strategy that will help safeguard the world leadership of European manufacturers and jobs in Europe.

FOCUS ON

Business-Friendly Environment and Governance

We, the undersigned Industry Associations:

- recall that industry is the backbone of a sustainable economy providing goods we use in everyday life. A sustainable competitive industry is the foundation for smart, innovative growth in Europe providing jobs and welfare for EU citizens. An impactful EU industrial strategy should aim at creating dedicated support for entrepreneurship including start-ups and SMEs; and re-establishing the positive link between industry and society through which the benefits of a sustainable economy can be spread to all.

- highlight that the EU industry requires a global and EU competitive level-playing field and a stable integrated, predictable and proportionate legislation. A coherent medium to long-term industrial strategy is vital for ensuring policies on sustainable access to resources and energy at a competitive price. Specifically, balanced climate, energy and raw materials policies, informed by European industrial needs and objectives, are essential for competitiveness, sustainable growth and employment, supporting innovation and investment by modern and traditional industries. A strong vision of how this can be achieved is essential to foster new European investments in industrial jobs.

In relation to the Commission Communication and its future implementation, we:

- acknowledge that the better regulation agenda to reduce red tape and improve effectiveness has been a step in the right direction. Nevertheless, the implementation of existing legislation for business certainty and attracting EU and foreign investment and the link between better regulation and harmonised standards should be reinforced.

- support displaying and monitoring the GDP share of the utility and the mining and quarrying sectors; call to link their enabling role for other sectors and recall to measure progress of the re-industrialisation agenda against the 20% of GDP share of the manufacturing industry by 2020;

- consider that the systematic use of policy impact assessments prior to the adoption of proposals is a positive development, but needs to be more transparent, objective and credible;

- emphasise the need to implement an ambitious industrial strategy including policies and initiatives addressing the challenges and gaps identified by the Communication and in this Joint Paper;

- call on the European Commission to include in its next Working Programmes industrial policy objectives supported by an action plan with concrete measures to ensure a balanced implementation of climate, energy and raw materials policies;

- acknowledge the opportunity – foreseen by the Communication – for the business community to engage in an open and inclusive forum to cooperate and monitor progress in implementing an industrial strategy and its respective policies;

- call on the European Commission – in line with the Competitiveness Council Conclusions of 29 May 2017 – to develop and implement concrete measures in close consultation with Member States and industrial stakeholders;

- note the new role of the annual EU Industry Day but emphasise the need to establish a permanent dialogue not only through the High-Level Industrial Roundtable – knowing that the question of governance will be instrumental for the implementation of the strategy.

FOCUS ON

Skills and Training

In order to follow-up the Commission Communication and in order to achieve the European Commission's goal of industry's contribution of 20% to EU GDP by 2020, it will be necessary to ensure that industry has the required pool of skills. This is a crucial pre-condition for enabling European industry growth in the medium to long run. However, there are a number of structural social challenges facing Europe's societies, e.g. demographic change, as well as digitisation and other technological developments. These must be addressed in implementing the new Skills Agenda for Europe and setting the priorities in the industrial strategy.

Even though, in the area of skills and training, the Communication is, for the most part, a valuable stocktaking and cataloguing exercise, we would still like to request further action from the Commission so as to:

- Help **Member States to learn from each other through bench-learning** with regard to national skills policies;
- Take into account in its **future skills anticipation blueprints** all interested sectors with skills shortages and ensure national implementation;
- Support **Erasmus +**;
- Inform about the on-going change of professional profiles and the demands for new skills in the industrial sectors as a result of digitisation;
- Put emphasis on science, technology, engineering and mathematics (**STEM**) skills in future initiatives in this area as this was lacking in the recently released New Skills Agenda for Europe;
- Facilitate the **adaptation of the workforce** to new business models and working conditions through a support for active social dialogue, at the appropriate level. Many manual tasks are now automated, also allowing for improvements in occupational health and safety. Man-machine interaction or coboting is increasingly becoming standard practice.
- **Support life-long learning tools**, as up-skilling, programming and coding skills will be

increasingly in high demand in many industrial jobs. Furthermore, we must encourage a change of mindset when it comes to lifelong learning.

- **Support all capacity building exercises** such as the European Institute of Innovation & Technology (EIT), social dialogue and Corporate Social Responsibility (CSR) projects where appropriate as tools to achieve the above goals.

We also call on Member States to:

- **Design skills policies** achieving a better use of available resources through clustering and creating more synergies to improve learning outcomes, thereby contributing to labour productivity growth;

- **Increase the adaptation speed** at which education and training curricula are taking on board changing skills demands on the labour market, including in vocational education and training. The strong presence of technical and practical skills in educational programmes will need to be adapted in order to accommodate contents to the new digital era.

- **Develop adaptable curricula for a number of new jobs** and tasks in industry that are not known presently. New industrial developments are demanding new technical skills; more engineers will be needed, in particular in fields like automation, robotics, cyber security, and software and hardware integration. To achieve this, the following should be taken into consideration:
    - Ensure the presence of digitisation across all parts of professional life, across the general and vocational education curricula in the EU languages, to be made available for national authorities since digitisation is important and will be the key “enabler” for “consumers” as well as “users”;

    - Teach teachers and trainers and provide them with the necessary equipment through cooperation with public and private actors;

    - Foster interaction between public and private actors in educational centres and industrial sectors as a solution which has the potential to improve the match between companies’ skills needs and the outputs of education and training;

    - In order to facilitate the uptake of new skills and to upgrade technical education it is recommended to make internships and apprenticeships more attractive to companies;

- **Promote professionals capable of systemic thinking and entrepreneurial mind-set** by integrating technical, analytical and soft skills training in the current education and training systems.

FOCUS ON

Research and Innovation

As far as research and innovation (R&I) is concerned, we welcome the approach of the Communication, particularly its references to the Innovation Principle through Better Regulation, the Important Project of Common European Interest (IPCEIs), lower-carbon economy and digitalisation. Moreover, the Communication strikes the right balance between the needs of SMEs and big companies, when it comes to research and innovation.

The following elements of Horizon 2020 are not explicitly mentioned in the Communication but should remain in the future Framework Programme (FP) to ensure that industry stays ahead of the global competition:

- the industrial pillar including the Public-Private Partnerships (PPPs) and Joint Technology Initiatives (JTIs);
- collaborative industrial research and innovation (R&I);
- grants;
- option to opt-out of open data.

The following four elements are only partially considered in the Communication and in the existing EU research & innovation framework and should therefore be more formally enforced in an EU industrial strategy:

- **Research and innovation as a driver for industrial growth**
  High market uptake of research programmes into industry by large companies and SMEs in all industrial sectors should become a EU top priority to ensure the competitiveness of the EU industry. This would result in economic growth, jobs creation, raw-material security and higher return of taxpayer investment in transnational research.

- **Technological development and education**
  A combined development of skills and technologies should be envisaged in order to maintain and increase Europe's attractiveness as a manufacturing base at all stages from education through industry (cf. **Focus on Skills & Training**).

- **Research & innovation in an international context**
  There is currently no reciprocity of access to institutional and public programmes between

the EU and the rest of the world (such as Asia). Added value could be created by allowing European companies to participate in research programmes outside the EU. An adequate EU regulatory structure should therefore be put in place. Moreover, the finance gap in R&I between Europe and the rest of the world is affecting the worldwide industrial competition.

- **Access to research funding**
  R&I programmes need to be further refined in order to increase the current low success rate. The current heavy administrative burdens should be reduced. Consistency and complementarity of R&I funding at different levels (EU-wide, Member States, Regions) should be improved and a funding roadmap should be created. All funding and financing opportunities should be further developed, including institutional PPPs (Joint Undertakings), direct grants to private companies and financing from private investors.

In a forward-looking perspective, the following points related to research and innovation should be implemented as a matter of priority as a follow-up to the Commission's Communication:

- With reference to research and innovation, the reduction of the time to market or end-user should be achieved by, inter alia, reducing legal uncertainty, increasing regulatory efficiency and systematic consideration of the Innovation Principle when developing new legislation.

- Innovation should help foster European growth and jobs. This can be best done if it leads to EU-based manufacturing. Therefore, the export of innovative products should be favoured over a pure know-how transfer. Technology and industrial R&I systems development should be a main area of the next Framework Programme.

- Regulatory and financial instruments should be put in place to incentivise well-established European industrial players to adapt to the lower carbon society in order to unleash their full innovation potential and compete at global level. This can be done by supporting the introduction of lower carbon innovation in the European industry and contribute to fast time-to-market of R&I developments.

- The close connection of the scientific and research infrastructure with industrial R&I is a main success factor for the European industry and provides a strong incentive for companies to stay in Europe. Strengthening the close relationship between scientific and industrial research should be a focus to keep industry and, by this, growth and jobs, in Europe.

- The EU budget should be re-balanced in light of the importance of R&I ensuring adequate coordination in order to create the basis for future prosperity of Europe.

FOCUS ON

Access to Finance

We welcome the Communication's chapter on **Investing in the industry of the future** as it rightly puts a strong emphasis on the investments needed to drive industrial transformation. While the Communication outlines many useful initiatives, the following points should also be addressed to ease access to finance:

- **Leveraging private capital and bridging the investment gap**
  Since industrial projects and the development of new technologies are capital intensive and need important upfront investment, an ambitious EU industrial strategy needs to foresee the further development of financing instruments to leverage private capital and bridge the investment gap until the revenue stream can be established.

- **Facilitating investments in industrial sectors**
  The EU should further pursue its efforts to facilitate access to risk capital (e.g. the EFSI and first-of-a-kind financing instruments), reduce the merchant risk and the insurance risk, thus facilitating investments in industrial sectors.

- **Strengthening the existing funding mechanisms**
  The creation of the new financing mechanisms, however, should not undermine the existing funding mechanisms (grants). A sound coordination between grants and other EIB finance instruments remains crucial for long-term investment planning for big industrial projects and deployment of new technologies, acknowledging that loans and guarantees cannot achieve the same objectives as grants.

- **Supporting investment in new technologies**
  Achieving the EU goals transforms societies, economies and industries and requires investments in new technologies, including the ones for the energy transition and digitalisation. A bold EU industrial strategy should support the transition of historical sectors to adapt to the new requirements of the evolving policy targets and regulatory environment, e.g. the Paris Agreement.

- **Unleashing regional investment opportunities**
  The added value of regional investment opportunities should be unleashed by creating an enabling framework for inter-regional investment platforms and financial schemes that take into account both technological and regional characteristics.

- **Achieving a level-playing field globally**
  Globally, a level playing field needs to be established taking into account the developments in other world regions (e.g. financial backing to the state-owned companies). An EU industrial strategy should ensure adequate policy responses to put European companies on the same footing, in particular regarding the support for exporting EU products and technologies. The EU should support exports by facilitating overseas financing through the EIB and Export Credit Agencies. The EU should also work with other OECD members to ensure that the OECD export credit rules are well adapted to the needs of the EU' s exporting industries.

FOCUS ON

Internal market

The European Single Market is one of the EU's greatest achievements. Its high standards have underpinned the competitiveness of European businesses, establishing the European Union as a key global market and export partner. The Single Market has improved the everyday life of European businesses and citizens by stimulating investments and economic growth, boosting employment, and reducing costs and administrative/regulatory burdens.

However, the dynamics of integration have been slowing down while new challenges have arisen in the past years. Barriers remain or resurge, hampering the realisation of a fully integrated Single Market for products and services and increasing cumulative costs for the European industry. Divergences between Member States' interpretation of EU law lead to significant challenges for businesses to compete on a level-playing field. Furthermore, a lack of harmonised rules and/or standards in certain sectors or legal domains often leads to the enforcement of different national rules, challenging a truly free movement of goods across the EU.

Against this background, we welcome the fact that the Communication acknowledges the internal market as a key driver for the competitiveness of the European industry. However, the document fails to provide a long-term vision or a commitment to complete the Single Market with ambitious EU action. 2018 will mark the 25th anniversary of the European Single Market, which represents an opportunity to take stock of its benefits and current limitations. The European industry calls upon European institutions to set a long-term vision of the European Single Market for the next 25 years. With a solid legal framework for the Single Market and a strong industrial base in Europe, we are convinced that the European Union will live up to the global challenges across the three pillars of sustainability: social, economic and environmental.

An impactful and comprehensive internal market strategy should have the following elements as cornerstones:

- **Long-term predictability for business certainty and innovation**
  The European industry needs a long-term, stable framework to be able to invest, innovate and thrive sustainably in Europe. The legal framework should not only encourage industry to stay in the EU for research, development and manufacturing, but should also incentivise companies who moved production plants outside the EU to come back.

- **Effective implementation of EU law**
  EU law is not always applied in a harmonised way by Member States, which can create a fragmentation of the Single Market. Issues can be experienced due to the non-harmonised interpretation of European legislation and unequal transposition of Directives. The European Commission should step up in its role to make sure that EU law is properly enforced and that national legislation within harmonised sectors is respecting EU law. Additionally, before coming up with new legislative proposals at EU level, it should be checked if the existing ones have been properly and fully enforced. New laws and rules should be based on science and evidence-based facts.

- **Stronger market surveillance**
  Market surveillance is a prerogative of Member States, or even of Regions, which creates different levels of surveillance across the EU – hence an unlevel-playing field between products on the EU market. In this respect, we welcome the expected revision of the rulebook on market surveillance but expect an ambitious proposal to achieve increased coordination between authorities. This could be achieved, for example, through an EU agency when relevant for an industry. Furthermore, more accredited laboratories would be needed for both market surveillance authorities and industry to perform physical checks of products.

- **A level-playing field in the EU Single Market**
  A level playing field must be ensured for companies – European and non-European – competing on the EU market. Clear and equal rules should be set for all operators and effectively enforced. Otherwise, the consequence is unfair competition in the European market, where domestic producers are at a competitive disadvantage. It is also important to step up EU customs to ensure the level-playing field with non-European companies. In this field, a key priority lies in the improvement of the safety of products entering the Single Market, for example by an efficient implementation of the REACH Regulation.

- **Harmonised standards**
  The New Approach and European standardisation have contributed significantly to the development of the Single Market. The European standardisation system has played a vital role in ensuring the free movement of goods by removing technical barriers to trade. We regret that the Commission Communication on a "Renewed EU Industrial Policy Strategy" does not address the crucial point of harmonised standards as they are key to complete the Single Market. The references of harmonised standards must be systematically, without unnecessary delay, published in the Official Journal of the European Union under their respective Directives.

- **Complete the Single Market**
  For certain products and materials, the Internal Market is not yet a reality as national standards and regulations stand in the way of the free circulation of goods. Mandatory requirements at EU level should therefore be adopted by European institutions to allow for the internal market to become a reality for all products. For non-harmonised sectors, the fragmentation of the single market should be prevented, for instance through improved functioning of the mutual recognition principle. In this respect, we welcome the intention of the Commission to simplify and clarify the functioning of mutual recognition and compliance procedures.

- **The key importance of Public Procurement**
  Public procurement accounts for a significant share of the EU economy (around 20% of EU GDP) and is crucial for many industrial sectors. We welcome the fact that public procurement is acknowledged as 'a driver for smart, sustainable and innovative technology' in the Communication. The 2014 revised framework provides that more established and transparent qualitative, social and environmental criteria can become determining factors in the choice of a contractor. This approach should be promoted and implemented properly. Furthermore, it is also essential to ensure a uniform application and enforcement of EU public procurement law to guarantee a level-playing field between EU and non-EU market players.

FOCUS ON

Trade and International Market Access

Fair trade and fair access to third markets are vital for the European industry. The European industry is a global leader in many industrial sectors, and many jobs in Europe actually depend on exports. Trade is also crucial for the development of SMEs, which account for a large majority of European companies and constitute the backbone of the EU economy and supply. In recent years, the European Commission has been quite active in supporting companies in their efforts to export, e.g. with the Market Access Database or Export Helpdesk, or with increased transparency for stakeholders on trade negotiations.

However, there are significant challenges to overcome. Countries around the world are putting industry at the very top of their political agendas (e.g. Made in China 2025, Make in India, America First), pushing their companies to go abroad and become export leaders, sometimes to the detriment of international trade rules. This includes governments subsidies to state-owned enterprises at levels prohibited in the EU single market rules, overcapacities, export duties on or double pricing of raw materials. Furthermore, protectionist measures, tariff and non-tariff barriers tend to increase on international markets, thus reducing market access and business opportunities for European companies. The European industry, both large- and small-scale, therefore faces considerable challenges with respect to global competition.

Against this background, we welcome the Communication as a step in the right direction. However, the document fails to address pressing needs, such as a long-term vision for EU trade policy, the question of implementation and monitoring of trade deals, or the issue of governance. An ambitious and comprehensive trade strategy, accompanied by a concrete action plan to materialise the objectives, is needed to maintain the EU industry position as both important EU supplier and world export leader. In this strategy, efforts should be put on:

- **Defining a long-term vision**
  As in other fields, the European industry needs a predictable and stable framework to thrive and invest – what is the long-term vision of European institutions when it comes to trade? What could be the specific targets and Key Performance Indicators to assess the market share of European companies on international markets?

- **Improving market access**
  International trade should be open, and the EU trade policy should strive to open new markets, be it through multilateral or bilateral paths, and actively address tariff and non-tariff barriers that hamper European companies worldwide.

- **Achieving a level-playing field in terms of market access**
  We welcome the reference, in the Commission Communication, to the promotion by the EU of a 'global level-playing field in bi- and multilateral trade negotiations'. Indeed, international trade should be fair, and European companies should be able to compete on an equal footing with their competitors. The EU must have the instruments at its disposal to ensure that the rules are respected and to act decisively when countries engage in unfair practices. In the absence of international competition rules, a level-playing field should be achieved through an efficient trade defence system, market surveillance and the strict enforcement of EU law. Strengthening Intellectual Property Rights, and achieving a level-playing field notably in the fields of investment and public procurement, are also key for rules-based trade. The recent proposal of an enabling framework to screen foreign direct investments that may pose a threat to security or public order should be discussed in light of current global competition trends. Currently, sustainability chapters in Free Trade Agreements (FTAs) mainly refer to labour standards. In response to calls to introduce sanctions in case of non-compliance, it is rather desirable to include positive references to safety, health and environment standards (e.g. UN SAICM, Paris Agreement etc.).

- **Implementing and monitoring trade deals**
  We welcome the ambitious trade agenda on FTAs presented in the Communication. However, beyond negotiations of new trade deals, the implementation and monitoring phase is key to ensure that European companies do reap the full benefits of the agreements. Likewise, communication and dissemination of information on the possibilities created by FTAs should be increased, starting by emphasising export opportunities for EU companies. In the European Commission, resources allocated to trade, and in particular to implementing and monitoring trade deals, should be increased – especially given the new generation of trade agreements that will enter into force in the coming years.

- **Enabling a swifter governance**
  European institutions should adopt a more coordinated approach when it comes to trade, and more consistency between trade, customs and industrial policies should be fostered. Coordination between the different Directorate Generals of the European Commission needs to be reinforced. Furthermore, the Commission should establish a monitoring system on burdens of the European industry to which global competitors are not subject, such as unilateral regulatory costs and administrative burdens in the EU. In light of the Communication, we would like to stress that the EU should equip itself with an ambitious economic diplomacy strategy in consultation with EU Member States and businesses. Finally, negotiating processes and trade procedures, although complex, should be shortened to match more business needs.

List of Signatories

LOGOS


ACEA
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Think Concrete. Go Precast
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CEMBUREAU
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EUROPEAN
BICYCLE
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ECGA


BSEF
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Bromine Council


Cerame-Unie
The European Ceramic
Industry Association


European
Crop Protection


AECM
ASSOCIATION
EUROPEAN
CANDLE
MAKERS


Confédération Européenne de l'Industrie de la Chaussure
European Confederation of the Footwear Industry


CET


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heat pump association


ETRMA
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EPEE
European Partnership for Energy and the Environment


EuCIA
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EVIA
European Ventilation Industry
Association


EPMA
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semi


FEICA


FORATOM
THE VOICE OF THE EUROPEAN NUCLEAR INDUSTRY


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better access. better health.


Solar Heat
Europe
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from diagnosis to cure


FuelsEurope


FEPA
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Glass Alliance
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NIA
Nanotechnology
Industries Association


SPIRE
Sustainable Process Industry through
Resource and Energy Efficiency


FEPE


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APFE - European Glass Fibre Producers Association


Nickel
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TBE


fepr


GLASS
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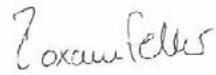
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Marco Mensink
Director General
CEFIC - European Chemical Industry Council



Renaud Batier
Director General
CET - European Ceramic Tile Manufacturers Federation



Jos Cox
President
EAACA – European Autoclaved Aerated Concrete Association



Patrizio Antonicoli
Secretary General
CEI-Bois - European Confederation of Woodworking Industries



Frédéric Van Houte
Director General
CIRFS - European Man-made Fibres Association



Egbert Beuving
Secretary-General
EAPA – European Asphalt Pavement Association



Ulrich Adam
Secretary General
CEMA - European Agricultural Machinery Industry



Sigrid de Vries
Secretary General
CLEPA – European Association of Automotive Suppliers



Moreno Fioravanti
Secretary General
EBMA - European Bicycle Manufacturers Association



Koen Coppenholle
Chief Executive
CEMBUREAU - European Cement Association



Nicole Denjoy
Secretary General
COCIR - European Coordination Committee of the Radiological, Electromedical and Healthcare IT Industry



Dr. Corina Hebestreit
Managing Director
ECGA - European Carbon and Graphite Association



Sylvain Lhôte
Director General
CEPI - Confederation of European Paper Industries



Manuel Marsilio
General Manager
CONEBI - Confederation of the European Bicycle Industries



Jean-Philippe Azoulay
Director General
ECPA - European Crop Protection Association



Renaud Batier
Director General
Cerame-Unie - European Ceramic Industry Association



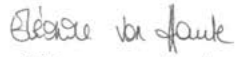
Christophe Sykes
Director General
Construction Products Europe



Antonio Caballero González
Secretary General
ECSPA - European Calcium Silicate Unit Producers Association



Xavier Ibled
President
EDG - European Domestic Glass



Eléonore van Haute
Secretary General
EGEA - European Garage Equipment Association



France Capon
Secretary General
EPMF - European Precious Metals Federation



Jorge Estévez
President
EEA – European Elevator Association



Murray Cook
Executive Director
EGGA - European General Galvanizers Association



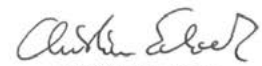
Patrick Clerens
Secretary General
EPPSA - European Power Plant Suppliers Association



Alberto Arnavas
Director General
EFCC – European Federation for Construction Chemicals



Thomas Nowak
Secretary General
EHPA - European Heat Pump Association



Christian Eckert
Secretary General
EPTA - European Power Tools Association



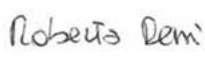
Fabio Gargantini
Secretary General
EFCEM - European Federation of Catering Equipment Manufacturers



Antonio Caballero González
Secretary General
EMO - European Mortar Industry Organisation



Thomas Hünlich
Secretary General
ESGA - European Special Glass Association



Roberta Dessì
Secretary General
EFIC - European Furniture Industries Confederation



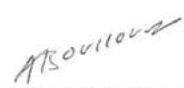
Andrea Voigt
Director General
EPEE - European Partnership for Energy and the Environment



Hendrik Abma
Director General
ESIA - European Semiconductor Industry Association



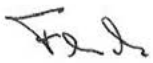
Nathalie Moll
Director General
EFPIA - European Federation of Pharmaceutical Industries and Associations



Lionel Aboussouan
Executive Director
EPMA - European Powder Metallurgy Association



Dominique Richardot
Secretary General
ESTA - European Steel Tube Association



Dr. Edmund Fleck
President
ESWET - European Suppliers of Waste-to-Energy Technology



Alexandre Dangis
Managing Director
EuPC - European Plastics Converters



Axel Eggert
Director General
EUROFER - European Steel Association



Fazilet Cinaralp
Secretary General
ETRMA - European Tyre & Rubber Manufacturers' Association



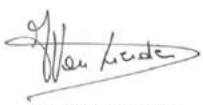
Francesco Marchi
Director General
EURATEX - European Apparel and Textile Confederation



Guy Thiran
Director General
EUROMETAUX - European non-ferrous metals Association



Milan Nitzschke
President
EU ProSun - The Sustainable Solar Energy Initiative for Europe



Inès Van Lierde
Secretary General
Euroalliages - Association of European ferro-alloy producers



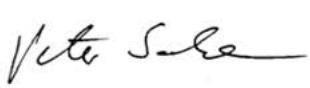
Corina Hebestreit
Director
Euromines - European Association of Mining Industries, Metal Ores & Industrial Minerals



Julie Leroy
Secretary General
EuCIA - European Composites Industry Association



Rene Schroeder
Executive Director
EUROBAT - Association of European Automotive and Industrial Battery Manufacturers



Dr Peter Scherm
General Manager
EUROMOT - European Association of Internal Combustion Engine Manufacturers



Ralf Wezel
Secretary General
EUGINE - European Engine Power Plants Association



Brian Ricketts
Secretary General
EURACOAL - European Association for Coal and Lignite



John Brennan
Secretary General
EuropaBio – European Association for Bioindustries



Dr. Peter Hug
Board Member
EUnited - European Engineering Industries Association



Philippe Verschueren
Secretary General
EUROCORD - European Federation of Rope, Twine and Net Industries



Thomas Neesen
Secretary General
Europacable – Association of European wire and cable producers



Gerd Götz
Director General
European Aluminium - The voice of the entire aluminium industry in Europe



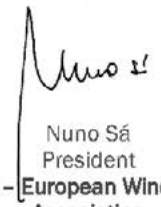
Philippe Verschueren
Acting Secretary General
EWRIS - European Federation of Steel Wire Rope Industries



Joerg Seifert
Secretary General
FEFANA - EU Association of Specialty Feed Ingredients and their Mixtures



Wouter Lox, MSc
Managing Director
EuSalt - European Salt Producers' Association



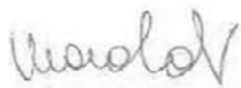
Nuno Sá
President
EWTA – European Wind Tower Association



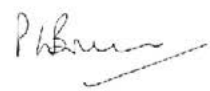
Angelika Christ
Secretary General
FEFCO - European Federation of Corrugated Board Manufacturers



Maryse Hervé
Secretary General
EUSFI - Federation of European Specialty Food Ingredients Industries



Mara Caboara
Secretary General
EXCA - European Expanded Clay Association



Philip Bruce
Secretary General
FEICA - Association of the European Adhesive & Sealant Industry



Daniela Vigilante
Secretary General
EuTeCer - European Technical Ceramics Federation



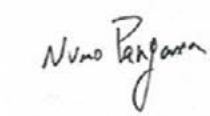
Elisa Setién
Director General
Fecc - European Association of Chemical Distributors



Jean-Philippe Guyot
President
FEPA - Federation of European Producers of Abrasives



Ralf Wezel
Secretary General
EUTurbines - European Association of Gas and Steam Turbines Manufacturers



Nuno Pargana
Coordinator
FECS - European Sanitaryware Producers Federation



Lisa Kretschmann
Managing Director
FEPE - European Envelope Manufacturers´Association



Russell Patten
Secretary General
EVIA - European Ventilation Industry Association



Alexander Döring
Secretary General
FEFAC - European Feed Manufacturers' Federation



Daniela Vigilante
Coordinator
FEPF - The European Federation of Ceramic Table- and Ornamentalware



Chris Downes
Secretary General
FERM - Federation of European Rice Millers



Béla Kelemen
President
FuelsEurope – European Petroleum Refining Industry



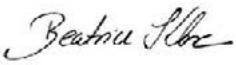
Roger Doome
Secretary General
IMA Europe - European Industrial Minerals Association



Jacob Hansen
Director General
Fertilizers Europe



Johann Overath
President
Glass Alliance Europe



Beatrice Klose
Secretary General
INTERGRAF - European Federation for Print and Digital Communication



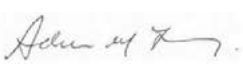
Nuno Pargana
Coordinator
FEUGRES - European Federation of the Vitrified Clay Pipe Industry



Axel Jorns
Secretary General
GlassFibreEurope - European Glass Fibre Producers Association



Jörg Palmersheim
Secretary General
ISOPA - European Diisocyanate and Polyol Producers Association



Adeline Farrelly
Secretary General
FEVE - European Container Glass Federation



Bertrand Cazes
Secretary General
Glass for Europe – Trade Association of Europe's flat glass sector



Ourania Georgoutsakou
Secretary General
LightingEurope – Lighting Industry in Europe



Mella Frewen
Director General
FoodDrinkEurope – European Food and Drink Industry



Jorgo Chatzimarkakis
Secretary General
Hydrogen Europe



Adrian van den Hoven
Director General
Medicines for Europe



Yves Desbazeille
Director General
FORATOM – European Nuclear Industry



Steinar Solheim
President
IFIEC Europe – International Federation of Industrial Energy Consumers



Serge Bernasconi
Chief Executive Officer
MedTech Europe



Dr Claire Skentelbery
Director General
NIA - Nanotech Industries Association



Arnaud Duvielguerbigny
Managing Director
PU Europe - European voice for the polyurethane (PUR/PIR) insulation industry



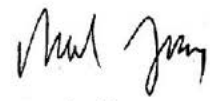
Magdalena Vallebona
Secretary General
TBE - Tiles & Bricks Europe



Dr. Veronique Steukers
Director, Health & Environment
Public Policy
Nickel Institute



Claude Chanson
General Manager
RECHARGE - Advanced Rechargeable & Lithium Batteries Association



Axel Jorns
Secretary General
TechFabEurope - European Association of Technical Fabrics producers



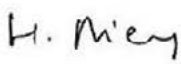
Rémi Gruet
CEO
Ocean Energy Europe



Christophe Tytgat
Secretary General
SEA Europe - European Ships and Maritime Equipment Association



Jean-Luc Mériaux
Secretary General
UECBV - The voice of the EU Meat Industry



Henri Rieux
President
PFP - Primary Food Processors



Laith Altimime
President
SEMI Europe



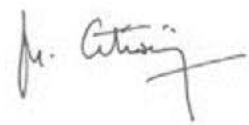
Dirk Fincke
Secretary General
UEPG - European Aggregates Association



Karl-H. Foerster
Executive Director
PlasticsEurope - Association of Plastics Manufacturers



Pedro Dias
Secretary General
Solar Heat Europe (ESTIF) – European Solar Thermal Industry Federation



Philippe Citroën
Director General
UNIFE - The European Rail Industry



Simona Vackeova
Secretary General
PRE - European Refractories Producers Federation



Daniel Gauthier
President
A.SPIRE - Sustainable Process Industry Association



Giles Dickson
CEO
WindEurope - Association for wind energy in Europe



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January 2018

