



ORGALIME

SPEAKING FOR EUROPEAN ENGINEERING

ANNUAL REPORT 2012 / 2013

MECHANICAL
METALWORKING
ELECTRICAL
& ELECTRONICS



CONTENTS PAGE

President's Message	01
Director General's Message	04
Board and Policy Committees	08
The Business Situation in 2012	11
Issues	15
Communications	34
Orgalime Publications	36
Orgalime Partnership	39
Members	41

PRESIDENT'S MESSAGE

I have just taken over as President of Orgalime at a particularly challenging time for Europe and for its manufacturing industry. As Orgalime's press statement issued at our November General Assembly where I was elected put it: *"Unresolved public and private financial imbalances within the Economic and Monetary Union and the subsequent decline in business confidence are now leading to low demand for engineering products in the EU. After a successful 2011, our industry in the EU is today witnessing an unfortunate stagnation in production, which is forecast to continue in 2013"*.

Our figures bear this out since we have seen a 1% drop in our industry's output to the end of 2012 (1840 billion euro) even though employment has in fact risen half a percentage point to 10.3 million.

Let me start by stressing that I do not believe that what is at stake is the future of our own industry. On the contrary our companies are at the root of technological progress and of the acceleration of industrial productivity in all areas of the economy and this will

continue. What is much more of an issue is where our clients are investing and therefore where growth is occurring.

It is a number of years that we in Orgalime have been warning policy makers that Europe was not on the right track for providing growth and jobs. As the industry which supplies capital goods to all other sectors of the economy, we have seen the signs of low investment in Europe in the internal market for several years. Now things have come to a head and at last politicians are waking up to what is happening – rather too late for the many people working before in industry who are now jobless.

We should of course be grateful that, at a political level our message is beginning to be heard and understood. For the first time in Brussels, this is at the highest level, since European Commission President Barroso voiced his clear support for our industry when he attended the event we organised in the European Parliament during our General Assembly where we launched our joint manifesto *'Manufacturing a Stronger and Greener Europe'* with our sister

organisation CEEMET. It has been well received and was a timely answer to the European Commission's Communication on re-industrialising Europe.

Obtaining recognition at the political level in Brussels is essential; however, it is just a start. It is a little over a year ago that, in a joint letter to Presidents Barroso and Van Rompuy, 12 Heads of State and Government suggested that in terms of priority areas for growth in Europe, *"action should start in the services sector"* and industry was hardly mentioned. Now the Heads of State have, for the first time, decided to hold two specific debates on industrial policy and industrial competitiveness in June this year and in February next year.

And then will come the hard part: implementing those reforms which are needed to make Europe a more attractive place for manufacturing investment. Our manifesto gives clear indications of what needs to be done. However essential it is for Europe to get back on the right track on industrial policy, it will, however, be rather difficult for many governments and indeed for the European institutions as a

whole to move away from business as usual – printing regulation, much of it ill-conceived and punishing for industry. This has become a habit and only now are regulators beginning to understand the cumulative impact that this is having on manufacturing and therefore on the whole economy. We really encourage them to think carefully about each and every regulatory or policy proposal that they wish to make. It is really time to burst the rather complacent and ethereal Brussels bubble. It is it rather late, given the horrendous reality of unemployment in much of Europe and particularly youth unemployment: in my country, Italy, for example we have 38% of school and university leavers who are unemployed and in several other countries this is even higher. Other countries, fortunately, are still in better economic health. But for how long, without a major political move towards really achieving a change in the approach to industry and the economy?

How should policy makers be moving forward? If we are pragmatic, we cannot expect that the European taxpayer is going to provide extensive funding whether at national or European level to boost the European economy. We have been hoping to see a shift of spending towards more investment in innovation, in modern technological infrastructures all of which would provide a boost to jobs, but old habits – die hard: the agricultural sector although it employs relatively few people today is still considered as the strategic sector by a number of governments.

Therefore, more efforts will have to be made to 're-industrialise' Europe through other means and this means creating the right framework conditions which will incite manufacturing investment in the EU and allow companies to grow, generate a profit and employ more staff.

Let me just draw a few highlights selected from our manifesto to explain what we are seeking:

- The cost of doing business needs to be reduced
- Investment and operating conditions in Europe need to be streamlined and improved
- We need to keep a full industrial supply chain
- High-tech infrastructure modernisation must be fostered, thus facilitating the early adoption of new technologies in Europe by implementing a policy framework which promotes competition, investment and innovation in these markets
- Regulation must really aim to ensure the right framework for growth, jobs and investment: policies must be goal-oriented but not prescribe technologies; the impact of new regulation and the cumulative impact of regulation on companies must be thoroughly assessed in advance; regulation must be more stable and predictable and also take into account companies' investment cycles; a realistic ex-post evaluation of legislation must become the standard: there is too much poor regulation around

- There must be better market surveillance, providing effective benefits to both manufacturers and to consumers: already adopted regulation must be respected
- A more welcoming attitude towards manufacturing investment by authorities is a must.

A last word on this to underline what I mean: a fellow CEO recently commented to me that when he was looking at where to site a new production facility in Asia, an ambassador from one of the countries he was considering for this investment travelled up to his company offices to discuss with him what the country's government could propose to attract the investment there. He had started by considering the alternative – investing at home: the welcome given to him by local authorities had first and foremost included the list of regulations and restrictions to respect and permits to be obtained. There are no prizes for guessing where the investment was made. We will not stop companies from investing close to their markets wherever they are – clients expect it – but we must never forget that Europe is the first market in the world and that our industry's success is based on this and on our exports. And if the US is succeeding in getting on the road to re-industrialisation, we must surely be able to do this too in Europe.

For me the obsession of all of us today must be on turning around our overall EU economy to provide jobs for our citizens



and in a particular for our children and thereby a good future here in Europe.

My belief is that the EU institutions – and Orgalime for sure, as we represent a major industrial sector – must act today and take a strategic long term approach based on a farsighted vision, to focus far more attention to our manufacturing industry and to Europe's core infrastructures, as the EU has in the past few years done with the single market for services. I really believe that industry must now be right at the top of the policy focus, if we want to keep our basic industrial prominence and know-how and to create the job opportunities which are vital to our society and social system of which Europe is proud.

Finally, if the focus of my message on getting Europe's economy back on the right track through a more sound industrial policy, there is a lot more to our activities and I hope that in reading this annual report you will see how active Orgalime is for its members on an ever wider range of issues. I am impressed by the range and the level of services Orgalime provides to support our members and the wider industrial community. For this I must say thank you to all our staff here in Brussels and to our members who contribute to making Orgalime what we are – the prime voice of Europe's engineering industry as a whole.

Sandro Bonomi



Sandro Bonomi

DIRECTOR GENERAL'S MESSAGE

Perhaps it's not surprising that Orgalime's membership base has grown – we now have 38 members, 6 up on a year ago; our efforts at working in a cohesive network for the core issues that we follow and our direct channels of contact to all echelons of the European institutions have ensured that the European engineering industries' voice is being heard loud and clear. As European Commission President, José Manuel Barroso said himself *"...you can count on my personal commitment to make sure that creating the right conditions for industry remains at the core of the European agenda..."*. Indeed, throughout the reporting period of this annual report, Orgalime has had meetings with no less than 4 Commissioners and regular meetings with Members of the European Parliament, as well as organising a number of events in the European Parliament. So, we are getting it right in terms of who we are rubbing shoulders with. The question is *"are they just hearing us or are they really at last listening when we talk about what industry needs if it is to invest in Europe?"*

The launch of the Orgalime manifesto, *'Manufacturing a Stronger and Greener Europe'* (in conjunction with our sister organisation, CEEMET) has indeed made an impact. Over 200 people from businesses, European institutions and other stakeholders gathered inside the European Parliament to witness the new found dedication and support given by Mr Barroso's Commission to our industry. We count on this not being a short lived show of support. It really is time that providing supportive framework conditions comes back into the centre of policymakers' focus: the institutions managed it before, they created the internal market which did much to reinforce the economic development of Europe's industry and

economy. But in 1992 policymakers declared that the internal market was completed and since then much of the policies and mass of regulations imposed on the economy have undermined the internal market and, with it, many sectors of manufacturing.

APPEALING TO THE VERY TOP

Last May, I travelled to the US with a delegation led by European Commission Vice-President Tajani. Together with other European company and association CEOs from a wide range of industrial sectors, we were able to express our enthusiasm at the idea that serious trade talks between the EU and US were being launched. While this will not be easy to achieve – there are clearly

both tariff issues and technical barriers to trade to resolve, we believe this is a strategic move which can have a lasting impact on the global trading framework which is so important to the success of our companies, which are Europe's leading exporters.

At our last General Assembly, we were pleased to be able to welcome Commissioner for Energy Oettinger, where we held frank discussions on the role that technology can and must play in the modernisation of Europe's energy systems. Such open discussions with our membership are, we feel, essential for policymakers.





EUROPEAN ENGINEERING SNAPSHOT*

	In 2012	(In 2011)
Output	€1,840 billion	(€1,855 billion)
Employment	10.3 million	(10.2 million)
Exports	€556,8 billion	(€521,5 billion)

*Note: these figures are given in nominal values and therefore based on current prices and exchange rates at the time of publication of the data.

All this has supported our tactics of engaging in a more forthright manner, adopted in the previous 12 months – a policy that has shown Orgalime as an organisation with an extensive network, transparent and honest about its goals and, above all, realistic in its ambitions to be the single voice representing the engineering industries as a whole – the largest manufacturing sector in Europe.

ISSUES

Our path towards putting manufacturing industry back on centre stage led to the issue of our manifesto for a stronger and greener manufacturing economy in Europe. Our manifesto also ties in with the rather more detailed sector initiatives led by Orgalime such as Electra *'The Smart World'* - April 2012 – for an electrical and electronics industry, the study conducted on the competitiveness of the mechanical engineering industry (for which we issued a comprehensive position paper in June 2012) and the similar study conducted on the European metalworking and metal articles industries a couple of years before. A common thread runs through all these initiatives – the need for a coherent, stable and predictable regulatory environment – in order to encourage industrial investment back to Europe. The core framework policies are the same, the fine details vary from sector to sector of industry.

In this context, we have seen energy policy rise in importance for our members. Members met for the first

time in our newly created Energy Working Group at the end of May 2012. Orgalime's strategic decision aims to profile the industry as technology solution provider to the challenges faced by the modernisation of Europe's energy systems and infrastructure: we need to move on a path which aims at solving the equation that modernisation inevitably results in much higher prices for consumers. And it is only technology, which will allow greater efficiencies and entice competition that can provide a solution, as we stressed in our comments on the EC's proposal for an EU Energy Roadmap 2050.

We are happy to report some legislative successes too! The recast of the WEEE and RoHS Directives is over and Orgalime has fought hard to obtain a reasonable solution for manufacturers during the complex adoption procedures. Nevertheless, what the European Commission would (as usual) claim started out as an exercise to make life simpler for manufacturers has turned into a damage limitation exercise: several unnecessary and costly changes introduced by the recast notably in the area of the scope, collection rate and registration, will have a direct impact on the recently created take back schemes in member states into which manufacturers had already invested several hundreds of millions of euro for setting them up. This is of course our longest-running environmental issue, but much work has also been put into trying to focus on keeping the REACH Regulation and

the Eco-design Directive frameworks stable. For REACH, for once, the review has not led to a revision, which we very much appreciate. For the Eco-design Directive we are still fighting, as attempts are being made to undermine the framework by introducing new evaluation methodologies which we believe would change the balance in favour of environmental requirements at the expense of social and economic factors. This may seem incredible at a time when one would hope that regulators as whole would understand that the core issue facing Europeans today are first and foremost employment and the economy, but such is Brussels where regulatory stability is hard to achieve.

There are of course many other areas of policy work in progress.

The internal market is high on our agenda as many of the core internal market directives which affect companies in our industry go through the process of alignment to the New Legislative Framework: although these changes will require a period of adaptation for manufacturers, the end result should really be a simpler and more coherent regulatory framework for these directives which will now use standardised definitions and standardised procedures. In spite of the fact that we might have hoped for a quick passage through the EP and the Council, some politicians have not been able to resist the temptation of trying to introduce some of their

own changes which of course would undermine the whole simplification process. Work, we hope however, should soon be completed.

OUR OTHER WORK

Although much of Orgalime's work is on specific issues, we are equally involved in a number of other areas which go beyond the immediate service provided to our members, but which aim to provide more individualised services to sectors of our industry.

First we are today servicing 22 sector associations - this area of our work is growing steadily as we acquire a reputation in our network for providing reliable and timely information, for sound management and for providing considerable expertise in working on the core issues affecting sectors.

The research association set up by our network which we now manage – EFFRA continues to grow. It serves as a pool of expertise to provide programming input for the allocation of some €640 million of public money for industry-relevant projects in the area of production technologies. The model of Public Private Partnership (PPP) which we have successfully developed is working well – too well perhaps as we are now faced with a number of new and competing PPPs...

And finally we must not forget our publications: with well over 1 million hard copies of the S 2000 General Conditions sold, and to keep up with the increasing

popularity and acceptance of our General Conditions since their initial publication in 1992, Orgalime has broadened the scope of available language versions of its new S 2012 publication to include 18 languages. There are to date 9 sets of Orgalime General Conditions that are designed to give concrete and comprehensive solutions to most of the practical problems encountered by companies trying to reach an agreement. We also provide a wide range of standard contracts which are widely used by companies in our industry.

NETWORKS

I am still, until the end of 2013, the Chairman of the Alliance for a Competitive European Industry (ACEI) which has been very active in the last few months in bringing the industrial policy agenda to the forefront: in July 2012, I met (along with other members of the ACEI) European Commission President Barroso and urged him to step up efforts to make Europe as attractive as it needs to be for investors, and particularly industrial investors, so as to ensure a recovery of the real economy, with a perspective for growth and jobs. We have also arranged follow up meetings with Commissioner for Energy Oettinger and Commissioner for the Environment Potočník. A number of further visits to commissioners are programmed.

To conclude, the times are not easy, but we have much to be optimistic about: the pendulum is beginning to swing again in favour of manufacturing industry. Policymakers in Brussels



Adrian Harris



Inge Dewit Vanhaelen



Jo Decaluwe

and in a number of the capitals **are** listening and hearing what we are telling them. We must keep pressing the same coherent messages in as many fora as possible in order to encourage policymakers along the way and to ensure that the actions that our clients and we require to make the EU an attractive and welcoming place to invest in, grow in, create employment becomes almost inevitable.

BOARD AND POLICY COMMITTEES

“Proof that Orgalime is being listened to emerged when European Commission President Barroso – the first time he has accepted our invitation – and a number of MEPs, Commission officials and representatives from member states, attended the joint event with the European Forum for Manufacturing and CEEMET where the new manifesto ‘*Manufacturing a stronger and greener Europe*’ was presented. The focus in Brussels had previously been essentially on the euro and on public finances and on business as usual – more policy, more regulation. Now policymakers are talking about economic recovery with a clear focus on manufacturing, growth and job creation. Our opinions and arguments, published in a comprehensive Orgalime position paper on industrial policy, were well reflected in the European Commission’s Communication on Industrial Policy ‘*A Stronger European Industry for Growth and Economic Recovery*’. Manufacturing is back in fashion - it is shown in the symbolic setting of a new 20% target for industrial output in relation to GDP. This we hope will serve to focus the minds of policymakers on, what we have long stressed, is a core truth: that manufacturing is vital to Europe’s economic recovery and future and that it is high time that the EU focuses on getting the right framework conditions in Europe to attract industrial investment.”

Klaus MITTELBACH, Chairman of Orgalime

BOARD OF DIRECTORS



MR. KLAUS MITTELBACH – CHAIRMAN
(ZVEI – GERMANY)



MR. BERNDT-THOMAS KRAFFT – PAST CHAIRMAN
(FMFI – AUSTRIA)



MR. ERIC JOURDE – VICE CHAIRMAN
(FIEEC – FRANCE)



MR. PAUL SOETE
(AGORIA – BELGIUM)



MR. JOÃO REIS
(ANEME – PORTUGAL)



MR. ANDREA ORLANDO
(ANIMA – ITALY)



MR. HOWARD PORTER
(BEAMA – UK)



MR. THOMAS BUSTRUP
(DI – DENMARK)



MR. JANEZ RENKO
(GZS MPIA – SLOVENIA)



MRS. MARIA SANDQVIST
(TEKNIKFÖRETAGEN – SWEDEN)



MR. HANNES HESSE
(VDMA – GERMANY)



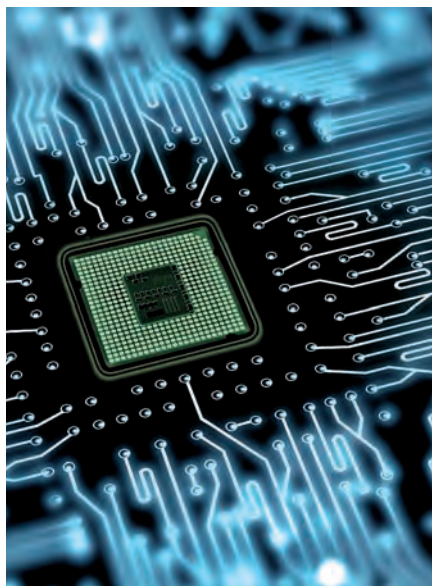
METAL ARTICLES LIAISON COMMITTEE (MALC)



"Metalworking and metal articles play an essential role in the supply chain between major suppliers of raw materials (steel and non-ferrous metals producers) and large customers such as the automotive, aerospace, engineering and transportation industries. These SMEs are spread all over the EU, in each region and every town, often close to their customer base. The companies, although small compared to those in other sectors, are flexible and versatile, innovative and service-oriented. They also provide real value added."

Maria SANDQVIST,
Teknikföretagen, Chairman of MALC

COMMITTEE OF THE ELECTRICAL AND ELECTRONIC INDUSTRIES (CEEI)



"This year we completed and launched at the Hannover Fair the follow up to our original Electra report '*The Smart World*' which provides our vision of how to ensure the long term growth and technological supremacy of our electrical engineering and electronics industry. This is one of Europe's growth industries which is at the heart of societal progress and technological development. It is also a leading export industry."

Janez RENKO,
GZS-MPIA, Chairman of CEEI

MECHANICAL ENGINEERING LIAISON COMMITTEE (MELC)



"The mechanical engineering industry is described as one of the leading manufacturing sectors in terms of performance and one of the most competitive in Europe - highly technology and export oriented. The industry has succeeded in maintaining its share of world markets, while other major producers such as Japan and the USA have seen sharp drops in their output and share of global production. We must, however, keep on working hard to maintain our position, as we see our competitors increasingly investing in redeveloping their manufacturing industry."

Andrea ORLANDO,
ANIMA, Chairman of MELC

A long-exposure photograph of a multi-lane highway at night, showing vibrant light trails from cars in shades of white, yellow, and red. The highway curves through a cityscape with illuminated buildings and streetlights in the background.

AN OVERVIEW OF SECTOR PERFORMANCE IN 2012

ORGALIME Sectors

Metal Products

-3,0

Mechanical Engineering

0,0

Electrical/ Electronics, Instruments, ICT and installation

-1,8

Total Orgalime industries

-1,0

**2012 Percentage change
in volume of production**

Source: National offices, Eurostat



THE BUSINESS SITUATION IN 2012

INTRODUCTION

Orgalime's economists compile and analyse their latest data and forecasts for the engineering industry twice a year. In other words, we analyse mostly the economic trends for metal products, mechanical engineering, electrical engineering, electronics and ICT and instruments (mainly chapters 25 to 28 of the NACE rev.2 business nomenclature).

Based on official data available, we estimate that the engineering industry's turnover value in the European Union (EU) reached some €1,840 billion in 2012. The number employed stood about 10.3 million people.

The engineering industry counts for some 28% of the output and a third of the exports of the EU manufacturing industries. Total trade (intra + extra trade) of the Orgalime industry reached €1,290 billion in 2012.

2012: A POSITIVE START, BUT ACTIVITY DECELERATED OVER THE YEAR

The European engineering industry entered 2012 against the 2011's strong growth background. Moreover, our industry experienced a rising uncertainty due to the escalation of financial imbalances within the Economic Monetary Union. Confidence indicators in the investment goods industry deteriorated not only in the winter of 2011/2012, but also during 2012.

By mid-2012, order stocks were increasingly dissatisfying. This situation was clearly reflected in the monthly business surveys compiled by various institutes in Europe and presented by the Directorate General for Economic and Financial Affairs (DG ECFIN). By December 2012, this assessment gave its place to a clear negative balance.

A SLIGHT OUTPUT CONTRACTION

The European engineering industry showed positive growth during 2012's first six months. By the third quarter, production was on 2011's third quarter's level. However, production fell slightly more by the final quarter of 2012. This resulted in an average 1% contraction for the year.

GLOBAL MARKET

According to the International Monetary Fund (IMF), the world's Gross Domestic Product expanded by a healthy 3.8% in 2011, but preliminary growth rate fell to 3.3% in the 2012.

The EU's gross fixed investment growth contracted during 2012. It experienced a quarterly level peak of €588 billion in 2005 year's prices during the first quarter, but it only reached €575 billion in the final quarter. This evolution had a clear negative impact on Orgalime industries.

The construction sector's demand stayed at the low levels of past years.

The Orgalime capital goods sectors' growth was therefore negatively influenced, firstly by the lower capacity utilisation in total EU manufacturing industry and secondly by the subsequent reduced needs for manufacturing capacity expansion. In this framework, demand for capital goods mainly focused on rationalisation and on replacement equipment.

Demand on export (extra EU) markets was generally positive in 2012, compensating for the somewhat lower growth in the EU compared to 2011: the US market showed strength, along with a few markets in Asia and

Latin America. China was 2012's big disappointment, as many Orgalime sectors in numerous member states saw a downturn in exports towards this market.

ELECTRICAL, ELECTRONICS AND INSTRUMENT INDUSTRIES

The electrical, electronics, ICT and instrument industry is amongst the largest industrial sectors in Europe. Its 2012 turnover value was about €740 billion. The sector employed an estimated 4.1 million people.

Situation in electrical engineering subsectors

The volume of production of **electrical engineering machinery** contracted by 2% in 2012. This was a clear deceleration compared to the expansion of 4.5% in 2011.

The large manufacturing subsector of **motors, generators and transformers** contracted for the first time in two years. It is indicative that its production volume fell by 3%. Growth rates fell also for wiring and wiring devices.

Electrical machinery subsectors, which are more dependent on the construction sector, such as **electrical lighting and domestic appliances**, remained sluggish throughout 2012 with a reduced production level.

ICT fell back but instruments expanded

Overall, business activity also decelerated in the ICT industry. All major subsectors recorded a contraction in output, with **consumer electronics** being hardest hit.

Sectors not so sensitive to the overall business cycle swings, such as **instrument engineering for testing and measuring**, as well as **medical instruments** continued their expansion in 2012 but at a slightly lower rate than in 2011.

MECHANICAL ENGINEERING INDUSTRY

The European mechanical engineering industry reached an annual turnover value of about €630 billion in 2012. Employment is estimated at 2.9 million people.

Fixed investment growth in the EU experienced a peak in the second half of 2011. On the contrary, on average it contracted in 2012. Therefore, intra EU demand gave little support to the mechanical engineering industry's growth.

Demand developed better on other markets, although there too growth decelerated compared to 2011. Of particular concern was the contraction of EU machinery's export to China. Exports to the US picked up, but the overall EU machinery exports' external growth decelerated compared to 2011.

As a result, the mechanical engineering industry's production volume remained unchanged in 2012 after an expansion – well above the average – of 11.5% – in the year before.



Uneven evolution among subsectors

A few sub-sectors in mechanical engineering continued to expand their business in 2012. In particular, sectors such as **material handling and power driven hand tools**, continued to grow.

Besides, the **metalworking machinery and machine tools' sectors** did rather well against the fading business confidence background.

On the contrary, output contracted in parts of the major subsector of special purpose machinery which consists mainly of machinery supplied to other manufacturing sectors and the mining and construction sectors.

FABRICATED METALS AND METALWORKING INDUSTRY

The fabricated metals and metalworking industry's turnover value in 2012 is estimated at €470 billion. Employee numbers are estimated at 3.3 million.

This industry produces, to a large extent, inputs or products used in other engineering sectors, such as machinery and the motor car industry. As performance in these sectors deteriorated in 2012, metal goods' output is estimated to have contracted by 3%.

The export share in total turnover was considerably lower in this sector compared to other Orgalime sectors. Overall, exports grew by a modest 4% in 2012 compared to an increase of 13% in 2011.

The contraction was broad-based with a production drop in all major subsectors. The major subcontracting activities of forging, pressing and stamping were hit the most.

EMPLOYMENT SLIGHTLY UP

It is estimated that employment actually increased in the European engineering industry during 2012 by about half a percentage point, thereby reaching a preliminary estimate of 10.3 million people.

This evolution is slightly surprising, since it reflects poor productivity performance in the light of a slight production output contraction. Nevertheless, according to short term employment indicators, most of the increase took place during the first half of the year. Employment indicators show some contraction during the final quarter of 2012. This can be attributed firstly to the efforts to reduce the rise of unit labour costs and secondly to the necessity to keep up with the internationally determined productivity growth.

2013'S GENERAL OUTLOOK: LIMITED GROWTH EXPECTED

Business activity in the European engineering industry has gradually slowed during the last six to nine months. Nevertheless, official data show that short term business indicators' outcome in early 2013 is not as negative as in the past year. On the contrary, they present a tendency towards stabilisation. Forward looking

surveys, such as Ifo Institute's expectations and global leading indicator, show a slight improvement.

The contribution of intra EU growth to the engineering industries is constrained due to several reasons such as the:


- Low business profitability
- Contraction in output in many manufacturing industry sectors
- The low probability of having the financial imbalances fixed in the short term
- The labour market's poor state.

Concerns of further high risks and global imbalances outside the EU area are also present.

Therefore, Orgalime economists expect a very modest improvement in the overall business climate for industry in 2013. They consider that no major acceleration will take place, but only a modest growth in production of around 1%.

Taking into account that the long term average annual growth is around 3%, such a growth is actually not as disappointing as it might appear.

What will also begin to have an impact, however, is whether the investment climate in Europe becomes more positive following, for the first time in many years, signs of a more supportive policy approach to manufacturing industry, which, however, still needs to be translated into real action by politicians.



*Attracting manufacturing
industry to invest in Europe
should be at the centre
of the policy agenda.*

ISSUES

Industrial Policy

In line with our commitment to transparency, Orgalime position papers are always circulated to the widest audience possible including the EU institutions, national authorities (via our members' network) and European-wide media. This distribution has again been further enhanced by the popularity of different social media channels, allowing our users to obtain their information on their channel of choice.

In 2012/13 Orgalime published a total of 36 position papers from environment & energy to market surveillance and industrial policy and from trade defence instruments to public procurement issues. All of our positions can of course be easily retrieved from Orgalime's website.

Making Europe more attractive for manufacturing investment and in particular making Europe a place where our companies, those of our suppliers and our customers can invest and work on a competitive basis with a reasonable rate of return has for several years now been part of our proactive agenda.

This last year it has become even more so, as we have seen the impact on a number of governments and their citizens of the difficult economic and financial circumstances. For us it is clear that attracting manufacturing industry to invest in Europe should be at the centre of the policy agenda. We are

now beginning to see signs of greater understanding from regulators, although it will be difficult to break the business as usual tendencies to add more regulation which impacts the cost of doing business in the EU for companies.

MANUFACTURING A STRONGER AND GREENER EUROPE

In response to the European Commission (EC)'s Communication *'A stronger European Industry for Growth and Economic Recovery'*, Orgalime and CEEMET (metal, engineering and technology-based industries) published a manifesto *'Manufacturing a Stronger and Greener Europe'*. The manifesto was presented



Adrian Harris



Eleonora Piccinni



Pierre Lucas



Christoph Riedmann



by Orgalime's President to the European Commission President José Manuel Barroso in November 2012 at an event attended by industry, Members of the European Parliament and EU officials.

With its Communication the EC sent a clear message that industry is vital to the economic recovery and that the industrial output must grow to reach 20% of Gross Domestic Product (GPD). Our industry endorses the EC's objective to transform Europe into a more sustainable economy and is eager to participate in the debate on how to achieve the 20% target.

Orgalime and CEEMET believe that the manufacturing sectors they represent are at the heart of this transition towards a stronger and greener economy. The manifesto outlines conditions we believe are necessary to go towards the 20% target and to maintain EU's position as one of the world's leading economic blocks.

Now Orgalime is participating in a number of the EC's task forces set up to work on particular issues highlighted in the Communication. We are contributing more particularly to the work of the EC task forces on 'markets for advanced manufacturing technologies for clean production' and 'smart grids', while also providing input into those working on 'clean vehicles', 'markets for key enabling technologies' and 'sustainable industrial policy, construction and raw materials'.

ELECTRICAL ENGINEERING AND ELECTRONICS

In April 2012, Orgalime published *'Electra II - The Smart World'*. The original Electra report was launched in 2008, determining the conditions needed to be met to ensure the growth of the EU's electrical engineering and electronics industry. This new report aims to analyse the follow up actually undertaken by policymakers and the impact of the 2008-9 economic crisis on the industry.

'Electra II - The Smart World', presented to the European Commission (EC) during the Hannover Fair 2012, is a comprehensive outline of five key areas that, in our view, require the full and urgent attention of policymakers, industry, stakeholders and the general public: infrastructures, cities, mobility, financing and industry. It analyses the development perspectives in these areas, defines synergies between them and proposes concrete actions.

Our Electra experts are currently focusing on disseminating and communicating the Electra II report and monitoring its follow-up in the EU institutions.

A dedicated Electra website is expected to be launched by summer 2013 (www.electra2020.eu).

Among the concrete follow-up actions by the EC is the *'Study on the Competitiveness of the EU Electrical Engineering Industry'* which will complete and build on the Electra study and serve to underpin future policy moves. It will also serve to assess the competitive

situation of the industry and the impact of framework conditions, in particular EU legislation, on the industry's performance and investment strategies.

Orgalime is providing input to this study for which the final report should be issued late in 2013.

MECHANICAL ENGINEERING – STUDY FOLLOW-UP

In February 2012, the European Commission (EC) presented the *'Study on the Competitiveness of the EU Mechanical Engineering Industry'*. The EC recognised the industry as a motor to reach Europe's 2020 goals including at the level of societal changes, competitiveness and growth. It also outlined the changes in the competitiveness of the industry over recent years following the economic crisis.

In the light of the EC's proposed follow-up, Orgalime published a position paper where we highlighted a few core issues that, in our opinion, will help in strengthening Europe's mechanical engineering industries. We provided recommendations on maintaining an attractive investment and regulatory framework in Europe, ensuring stronger support for the industry at the level of Research, Development and Innovation (R&D&I), providing support for the industry to maintain its enviable export and trading performance and providing more visible political support at the level of industrial policy. Many of the points made by us found their way into the industrial policy Communication issued by the EC in October 2012.



*Our industry endorses the
European Commission's objective
to transform Europe into a
more sustainable economy
and is eager to participate
in the debate on how to
achieve the 20% target.*

ADVANCED MANUFACTURING TECHNOLOGY

In its efforts to boost European manufacturing competitiveness, the European Commission (EC) created a Task Force for Advanced Manufacturing Technology. The EC's Task Force aims at improving the advanced manufacturing technologies' market uptake by industry and fix the current skills mismatch in the European labour force.

Orgalime participated in a public hearing organised by the EC at the beginning of 2013 following creation of the Task Force. We stressed that investments will only take place once legal certainty for placing products on the European market is established. This way the manufacturers will be able to shift their focus from dealing with new legislation to developing product innovation.

Our industry welcomes the EC commitment to manufacturing expressed during the hearing. The EC acknowledged as well that without manufacturing, Europe will not be able to emerge from the current crisis.

Internal Market & Standardisation



Philippe Portalier



Eleonora Piccinni



Efthymia Ntivi



Delphine Englebert

TECHNICAL LEGISLATION AND STANDARDISATION ISSUES

This last year has seen work on a number of fundamental areas on several directives and regulations which underpin the legal framework for Europe's product legislation.

Besides work on individual directives, we have been covering the area of European standardisation following the recent adoption of a new Regulation which fixes the framework for the European standardisation system and its link to harmonising legislation.

Following the adoption of the New Legislative Framework (NLF), we have been working on the legislative proposal for aligning 9 individual directives with this new framework.

Also at the centre of our work has been the Product Safety and Market Surveillance Package for which we have long campaigned since manufacturers have been becoming increasingly disillusioned with the cumulative burden of legislation which is not necessarily fully applied by all. Manufacturers are meant to respect such complex legislation while market surveillance authorities in a number of countries and policy areas have done relatively little to enforce it.

EUROPEAN STANDARDISATION POLICY

The new Regulation on European Standardisation (EC 1025/2012) itself entered into force on 1 January 2013. The scope of the Regulation covers not only products' standardisation

as was so far the case, but also the standardisation of services. The new Regulation allows, as well, direct reference of ICT technical specifications adopted by industry fora and consortia for public procurement purposes only.

The European Commission (EC) committed to establishing a new notification system for all interested parties with the full support of industry. This would ensure proper stakeholders' consultation and market relevance of (mandated) harmonised standards. Unfortunately, the EC does not seem to be fully satisfied and has already put the Regulation's review on its work programme for the end of 2013.

In the follow up to the adoption of the Regulation on European Standardisation, with a letter to the EC, Orgalime successfully intervened during the launch of two calls for tender that, in our view, were not in line with it. The calls concerned technical assistance for the standardisation work and the representation of NGOs under the Eco-design and Energy Labelling Directives with regard to the European Standardisation System (ESS).

Orgalime's main concern was a proposed procedure requesting a contracted organisation to represent the interest of NGOs in the standardisation work, while at the same time checking whether the work programme of the European Standards Organisation (ESO)'s technical body covers all aspects indicated in the Directives. The EC acknowledged

the issue we raised and subsequently modified these two calls according to the draft Regulation.

At the end of the year, CEN and CENELEC consulted their stakeholders and partners on its draft European Standardisation Strategy for 2020. The document aims to be their main guideline for conducting their work for the coming years. As a major supporter of the ESS, Orgalime commented on the draft document, supporting most of its elements. We did, however, express concerns about its over-ambitious goals for servicing societal and innovation needs which could undermine the market relevance of harmonised standards. We also suggested the need for considering how the financing of European standardisation would evolve in the future.

HARMONISED LEGISLATION - NEW LEGISLATIVE FRAMEWORK (NLF)

The alignment of 9 directives with the NLF is a move towards an improved legal framework for the placing of harmonised manufactured products on the single market and their free circulation.

During the discussions, Orgalime has been working closely with our different sector organisations to bring legal clarity and reduce the red tape for manufacturers.

The 3 European institutions are now negotiating the final text, discussing, among other, whether manufacturers should be allowed to use accredited

in-house bodies. Our industry strongly supports this possibility for certain directives (such as for the measuring instruments and ATEX Directives), because we see it as a step for reducing the cost of doing business, thereby improving European manufacturers' competitiveness.

The official expectation of the planning for adopting the Alignment Package is by the Council in May and the European Parliament (EP) in July 2013. Nevertheless, given the speed at which discussions on the texts are proceeding, it is likely that there will be some delay.

As a consequence of the NLF and the current alignment of 9 directives, Orgalime, together with other stakeholders, urged the European Commission (EC) to go ahead with a much needed revision of the so called '*Blue Guide*', which serves as the main interpretation tool of product legislation in the harmonised area. Such a revision is pivotal to avoid diverging interpretations of the new definitions and obligations. In a response to this call, the EC started the revision of the Guide in September 2012.

Orgalime has actively participated in the consultations and expressed the need for prompt clarification of the obligations of economic operators. This proposal was seconded by other stakeholders. Furthermore, Orgalime also commented on the first draft version of the '*Blue Guide*'. The EC seems interested in achieving consensus on the interpretation among all interested

parties and has committed to resuming the Guide's revision by end 2013.

RADIO TELECOMMUNICATIONS TERMINAL EQUIPMENT DIRECTIVE (R&TTE)

Another focal point in the New Legislative Framework (NLF) area was the European Commission (EC)'s proposal for a Radio Equipment Directive, revising the existing R&TTE released in October 2012.

Orgalime's position paper, published in close co-operation with DigitalEurope (consumer electronics) and CECED (household appliances), expressed support for the document, but also underlined our fears that some new provisions of the Directive would bring unnecessary burden to lawful manufacturers. Our industry argues that although the R&TTE revision includes some alignment with the NLF, it also introduces unnecessary obligations for manufacturers of products that were not intended to be under the scope.

MARKET SURVEILLANCE

In February 2013 the European Commission (EC) tabled its proposal of the much awaited Product Safety and Market Surveillance Package. It proposes a number of legislative and non-legislative measures to improve consumer product safety and strengthen market surveillance in the EU.

Orgalime considers this Package as a solid background for improving market surveillance whose mission is not only to protect consumers from unsafe

products, but also companies from unfair competition: these invest much time, energy and money to ensure that their products are compliant with all European legislation.

In a position paper published in October 2012, we already expressed our views on the anticipated package. We highlighted the need to establish proportionate and co-ordinated enforcement measures against infringement of all EU product legislation, including in the environment and energy fields. Such measures should be put in place to ensure confidence in the Single Market and a level playing field for all market operators.

The Package is being discussed in the European Parliament (EP) and the Council.

The draft Market Surveillance of Products Regulation would replace the existing provisions of Regulation (EC 765/2008) on market surveillance aspects. These were the first EU provisions obliging member states to establish effective and efficient border controls to check the conformity of products entering the Internal Market with all applicable EU legislation.

Orgalime will be calling on the EP and Council to build upon the excellent basis of Regulation 765/2008. Our aim is to ensure that the provisions we have requested and which are in the EC's proposal are not watered down. Furthermore, we are asking regulators to move quickly toward adopting the proposal and thereafter to dedicate

means to create a solid and operational European co-ordination and co-operation framework for efficient and effective market surveillance including at the EU borders. Given the complexity of the texts proposed, we can expect that it will take some time to adopt.

MACHINERY DIRECTIVE (MD) AND OUTDOOR NOISE DIRECTIVE

The European Commission (EC) is currently analysing the feasibility of merging the Outdoor Noise Directive with the MD. In January 2013, the EC held a kick-off meeting on this potential merger, expressing its intention to simplify existing rules and increase the effectiveness of the legislative framework on outdoor noise.

Orgalime will now contribute to the EC study on the possible merger of the Machinery and Outdoor Noise Directives.

Orgalime is also working on the MD explanatory fiches targeting concrete examples of problems that, even with the official EC guidelines, are still open to interpretation. These fiches will serve as a common industry understanding and answer to problematic issues.

CONSTRUCTION PRODUCTS REGULATION (CPR)

On 1 July 2013 the CPR will be fully applicable and will replace the existing Construction Products Directive (CPD). The new Regulation which is fully aligned with the rules of the New Legislative Framework (NLF) introduces simplified procedures, provides a common technical language and



harmonised assessments methods. Its aim is to ensure that reliable information is provided on construction products in relation to their performance.

Industry supports this new Regulation, seeing it as a guarantee of clear, transparent rules which apply equally to all companies throughout the EU, thereby ensuring fair competition on the market. It will be a significant improvement on the CPD which was not applied in a harmonised way throughout the EU.

What is more, the European Commission (EC) has committed itself to providing manufacturers with a possibility of using websites for the provision of their Declaration of Performance (DoP). However, implementing this is likely to take some time, as the way to do so still needs to be defined by the EC in a delegated act.

To help manufacturers to comply with the Regulation by July 2013, Orgalime has drafted an interpretation guide. It explains the main changes and obligations for all economic operators arising from this Regulation and aims to prepare manufacturers to meet requirements deriving from the application of the new Regulation.

Additionally, Orgalime is regularly preparing 'info packages' for its members which include documentation related to the implementation process of the CPR. This package deals, among other, with all matters relating to the adoption

of European Standards, testing and certification, attestation procedures, etc.

GAS APPLIANCES DIRECTIVE (GAD)

The European Commission (EC) is expected to table a proposal for the revised GAD in the course of 2013. The draft document will be based on the consultation to which Orgalime has contributed.

Throughout 2011 and 2012 the EC conducted its impact assessment. The study examined the alignment of GAD with the New Legislative Framework (NLF) and the possible modification of the scope. The results showed there was no need to extend the scope of the GAD; however, further alignment with the NLF is required.

Orgalime will continue following the GAD dossier through the legislative process.

DIRECTIVE ON EQUIPMENT AND PROTECTIVE SYSTEMS INTENDED FOR USE IN POTENTIALLY EXPLOSIVE ATMOSPHERES (ATEX)

The ATEX Directive has recently been aligned with the New Legislative Framework (NLF).

The alignment process obviously requires an update of the European Commission (EC) ATEX Guidelines that have served so far as an interpretative document, although it is not legally-binding either for manufacturers or for regulators.

This document is essential, nevertheless, to facilitate a uniform application of the ATEX Directive in all member states.

Therefore, in February 2013 Orgalime called for the update of guidelines on the measures manufacturers should take in case a new edition of a harmonised standard relevant to their products is published.

PRESSURE EQUIPMENT DIRECTIVE (PED) AND SIMPLE PRESSURE VESSELS DIRECTIVE (SPVD)

Orgalime is closely monitoring the alignment process of the PED and the SPVD to the New Legislative Framework (NLF). Whereas the SPVD has been fully aligned to the NLF requirements, the alignment of the PED has been put on hold, as the Directive first needs to be aligned with the Regulation on the Classification, Labelling and Packaging of Hazardous Substances (CLP).

More recently, Orgalime was involved in a study undertaken by the European Commission (EC) regarding the implementation of PED in member states. About 100 companies from our industry answered the questionnaire. The high response rate from Orgalime's companies will surely help to take account of our industry's views in the final EC report.



FREE TRADE AGREEMENTS (FTA)

The negotiations with the US and Japan were in the spotlight this year in our trade working agenda.

Orgalime strongly supports increased cooperation between the EU and the US, which we see as strategic and potentially the foundation for a further improved world trading system.

In spite of the larger picture there are, however, a number of practical issues which we would wish to see resolved. At the top of the list remains the issue of the malfunctioning of the US certification system which has preoccupied our companies for many years. In a position paper issued in October 2012, Orgalime suggested the European Commission (EC) finds a solution to this issue during the negotiations process.

Talks on a possible EU-Japan agreement are also progressing. In November 2012 the Council gave the EC a negotiating mandate, allowing it to commence an official dialogue with Japan. In Orgalime's view, the potential benefits of an FTA will depend on the willingness in Japan to improve effective market access for engineering products. EU negotiators were urged by the EU industry to halt the negotiations if Japan failed to remove trade barriers that make it hard, if not impossible, for EU companies to do business in Japan. Our industry has expressed a rather muted opinion, as we remain sceptical about the possibility

of achieving something which will really benefit our industry: Japan remains a blot on our export markets where, in spite of few tariff barriers, our industry has achieved a significantly lower rate of penetration for our products compared to other markets worldwide.

As Europe's leading export industry, we are closely monitoring progress on FTA negotiations and we support the EC's effort in the ongoing trade talks with partners such as Canada, India and Vietnam, as we have done for the practically completed FTA with Singapore (planned to be initialled in spring 2013), Peru (both the EU and Peru have already completed all approval procedures) and Colombia (entry into force of the FTA is expected in June 2013).

REVIEW OF TRADE DEFENCE INSTRUMENTS (TDI)

In May 2012, the European Commission (EC) launched a public consultation on the reform of the EU's TDI.

In response, Orgalime issued its position stating that the current basic regulations already provide the essential means to ensure accessibility, transparency, speed and clarity of TDI proceedings. Orgalime advised that working on the review, the EC and member states should keep the balanced approach of the existing solutions and remain committed to tackling unfair trade.

A draft legislative proposal, as well as the EC Communication and draft guidelines, are expected to be available for stakeholders' comments in spring 2013.

Trade



Željko Pazin



Paulina Marcickiewicz



Jackie André

COMMON EUROPEAN SALES LAW (CESL)

Political resistance has been increasing against the European Commission (EC)'s draft Regulation published in 2011. According to the proposal, CESL would be applicable to both Business to Business (B-2-B) and Business to Consumers (B-2-C) contracts.

Orgalime opposes the EC's suggestion, arguing there is no practical or legal need for including B-2-B contracts in the proposal. We maintain that the best the EU could do is not to interfere in B-2-B relations at all.

A report published in February 2013 by the Legal Affairs Committee of the European Parliament (JURI) proposed to limit CESL to distance on-line contracts with consumers. This proposed restriction of scope, if accepted, suggests the core value of this instrument would lie in the field of on-line business.

Meanwhile, throughout 2012 and 2013 the European Parliament (EP) hosted hearings and workshops on the issue of CESL involving academia, industry, law firms and the EU institutions. The last public hearing took place at the beginning of March 2013. JURI admitted that maximum harmonisation had proved impossible to achieve and an optional instrument is the only way forward.

Work on the proposal will no doubt continue much of this year and perhaps into 2014.

UNITARY PATENT PROTECTION

In 2012 the Danish Presidency resumed the discussion process on the European Patent dossier stuck at the European Competitiveness Council over the location of the Court of First Instance Central Division of the Unified Patent Court.

Taking the opportunity of reopening the issue, Orgalime published letters addressed to national governments and the European Commission (EC) urging them to proceed with an adoption of the legal texts setting up the unitary protection and the common jurisdiction system and not to halt the unitary patent solution over outstanding political disputes.

In June 2012, a compromise was reached putting the seat of the court in Paris with two thematic clusters - one in Munich (for mechanical engineering) and one in London (for chemistry, including pharmaceuticals).

Subsequently, Members of the European Parliament (MEPs) approved the whole EU patent package - Unified Patent Court, the EU Unitary Patent Regulation and Translation Regulation in December 2012. A Unified Patent will be enforced in any of the 25 participating member states without requiring patent owners to register in each individual country and therefore, it will eliminate local fees and translation costs.

The international agreement creating a unified patent court will enter into force on 1 January 2014 or after 13

contracting states ratify it, provided that the UK, France and Germany are among them. The other two acts will apply from 1 January 2014 or from the date when the international agreement enters into force, whichever is the latest. Spain and Italy are currently outside the new regime, but could decide to join it at any time.

INTELLECTUAL PROPERTY RIGHTS (IPR)

In 2012 Orgalime continued to advocate for better IPR protection, and for a higher political focus on non-consumer products in the context of the fight against piracy and IPR infringements.

Following the reorganisation of the EU Observatory on Counterfeiting and Piracy, Orgalime submitted comments to the Observatory on its redefined role and proposed 2013 work programme. The EU Observatory was initially created to better inform on counterfeiting and piracy on the Internal Market of the EU and share the best practice strategies and enforcement techniques from both the public and private sectors.

In its comments, Orgalime asked for more attention to be paid to the counterfeiting of non-consumer (industrial) goods. Additionally, Orgalime stated a better coordination is needed between the work against counterfeiting and piracy on the one hand and market surveillance efforts on the other.

Orgalime is also closely monitoring developments in the field of trade secrets and is advocating for EU

harmonisation of trade secrets' protection. Whilst some inventions may be patentable, companies may consider that they are better protected through secrecy. At the moment, there is no EU law on the protection of trade secrets and this area is regulated at national level, resulting in significant differences in the nature and scope of coverage.

PUBLIC PROCUREMENT

In December 2011, the European Commission (EC) presented a proposal for the Public Procurement Package.

In a position paper published in December 2012, Orgalime expressed its support for the simplification efforts taken up by the EC. We also back the EC's objective to improve access for companies to public procurement tenders. However, we claim, focus should lie now on a more

uniform application and enforcement of EU procurement legislation.

Orgalime is advocating for a balanced reform of the Public Procurement legal framework. Despite our general support for the Package, we keep voicing our concerns over amendments in certain areas and oppose a major overhaul of the current legislative framework.

Following a vote in the European Parliament's Internal Market and Consumer Protection Committee (IMCO) in March 2013, negotiations with the Council are now going forward.

In addition to the Package, the EC presented in March 2012 a draft regulation establishing rules for access to companies from non-EU countries to European public procurement deals. Its aim is to ensure a level playing field for European companies interested in bidding on external public contracts. Orgalime will continue monitoring this issue.

TRANSPARENCY CONSULTATION

Orgalime is registered in the so-called Transparency Register recently set up by the European Commission (EC) and European Parliament (EP), where we provide details on our association and on our activities.

Orgalime therefore participated in the consultation on the review of the register, which we feel is working well, although we still have some doubts as to the practical benefits derived from it by associations such as ours.



HORIZON 2020

Orgalime continues to follow the adoption process for the next multiannual R&D framework programme – Horizon 2020 – which will cover the period from 2014 to 2020.

Heated debates concerning the Horizon 2020 budget and the allocation of funds have been going on in the European Council, European Parliament (EP) and European Commission (EC).

In October 2012, the European Competitiveness Council reached an agreement on the participation rules for the Horizon 2020 projects. In particular, a single reimbursement rate was proposed for eligible costs concerning both research projects and close-to-market activities.

However, industry cannot fully support this compromise. The differentiation between the reimbursement rate of research projects and close-to-market activities favours institutes and universities giving them more funding possibilities than to industry.

Orgalime holds this differentiation of reimbursement rates will negatively impact industry projects. We will continue being active during the negotiations process, trying to put forward our views on the subject.

In November 2012, the Committee of Industry, Research and Energy (ITRE) adopted their report for the Horizon 2020 Package focusing on the coverage costs incurred by Small and

Medium Enterprises (SMEs). The specific instrument for the SMEs' involvement was attributed a budget 5 times higher than the one proposed by the EC. Some simplification measures were also suggested which mainly aimed at reducing the time to grant the project financing.

Finally, a disappointing decision of the European Competitiveness Council in February 2013 might lead to a severe cut of Horizon 2020 funding. Orgalime fears in case of cuts the industrial leadership pillar will receive even less funding than originally anticipated. This is a disappointment at a time when, at the level of its communication in the area of industrial policy, the EC is focusing on the need to be supportive of industry and of innovation. In practice, however, there is little sign that funding is shifting from the traditional pillar of agriculture to industry which offers the most potential for growth and employment, which is crucial at a time when Europe is lagging behind in its economic recovery.

However, on a more positive note, it was stated that the budget will not be shared with other projects such as Copernicus or Galileo that had been expected to absorb a significant amount of funding.

Negotiations on the Multiannual Financial Framework (MFF) and Horizon 2020 will be a significant point on our agenda for the whole 2013.



EUROPEAN INNOVATION PARTNERSHIPS (EIP)

Orgalime has been monitoring progress on the EIPs launched by the European Commission (EC) to solve societal challenges by bringing together all relevant stakeholders from different levels of governance: European, national and regional.

Several EIPs are already running including one on Raw Materials, which aims to contribute to reducing Europe's import dependency on raw materials crucial to the industry and the proposed new EIP on Smart Cities which aims to find ways to improve energy production, distribution and use, mobility and transport, ICT by linking them to the urban context.

Environment, Energy & Climate Change Policy



Sigrid Linher



Anne-Claire Rasselet



Ulrich Fikar



Anne-Louise Picard



Deborah Girasa

Implementation and review processes of environmental directives have remained a significant part of Orgalime's work agenda although, our focus has this year shifted somewhat towards resource efficiency that has become a strategic issue in Brussels, as well as to energy policy.

RESOURCE EFFICIENCY

The resource efficiency implementation actions envisaged by the European Commission (EC) directly tie in with many of Orgalime's core policy issues. Therefore, we are particularly concerned about potential overlaps and inconsistencies with existing legislative tools.

The EC and the Joint Research Centre (JRC) continue their project on the integration of resource efficiency and waste management criteria in European product policies. The second phase of the project was presented in September 2012.

Orgalime feels that issues raised during the first project phase have gone unaddressed. We consistently challenge the draft JRC methodology which, among other, completely neglects the already existing Methodology for the Eco-design of Energy-related Products (MEErP).

The Directorate General (DG) Environment also presented the calculation methodology for the Environmental Footprint of products, services and organisations (PEF/OEF). The aim of such a methodology is to assess, display and benchmark

the environmental performance based on a Life Cycle Assessment (LCA).

Orgalime sees this approach as inappropriate to compare different and very often complex products. In a joint letter addressed to the European Commission President José Manuel Barroso, Orgalime teamed up with the European Automobile Manufacturers' Association (ACEA) and the European Consumer Organisation in Standardisation (ANEC) to comment on this methodology's usage in policy making. We believe that, if the proposed methodology is used, it risks exposing companies to unfair competition and market distortion, as consumers would base their buying decisions on misleading information.

In a response to DG Environment's consultation on establishing Resource Efficiency Indicators, we held that the proposed indicators are biased towards environmental aspects, while not really accounting for economic angles. In order to serve their purpose, they should be fully harmonised, shared, representative and based on robust data derived from an appropriate methodology. Moreover, the lead indicator of Domestic Material Consumption (DMC) fails to reflect all aspects of resource efficiency in an appropriate and reliable manner.

With work moving ahead, Orgalime will monitor the implementation and the methodologies of resource efficiency

agenda. We will closely watch the link of resource efficiency initiatives with other EU legislation and ring alarm bells in case of potential overlaps.

ECO-DESIGN DIRECTIVE

In 2012 the European Commission (EC) reviewed the effectiveness of the Eco-design Directive and its implementing measures.

Orgalime is delighted to see the EC considers an immediate revision of the Directive or an extension of its scope beyond energy-related products as premature at this stage.

Moreover, the report issued by the EC stated that any further studies on both the Eco-design and the Energy Labelling Directive should concentrate solely on the aspects that could not be tackled in the study conducted in 2011. The future focus should lie on the efficiency of implementing measures and standards, as well as closer harmonisation of the two instruments.

In fact, early in 2013 the EC launched a study evaluating the Energy Labelling Directive and specific aspects of the Eco-design Directive. The study will look, among other, into the interaction between the Eco-design Directive and other environmental legislation and the need of future extension.

On the implementation front, Orgalime has been active in some areas of sector specific lots. In June 2012, we commented on draft implementation

measures for domestic and commercial kitchen appliances and raised concerns on arriving at a proper definition of the products covered.

In a letter sent to EC officials in February 2013, Orgalime expressed a negative opinion on the draft implementing measures on TVs and electronic displays. We believe setting of resource efficiency requirements in that case disregarded established criteria and procedures under the Eco-design Directive.

Another focal implementation point was the long awaited publication of the 2012-2014 Working Plan. The EC set out an indicative list of energy-using products, considered as priority for the adoption of implementing measures. The document ties in with Orgalime's request to first finalise implementation on existing lots, to strengthen the enforcement and then to consider launching new lots.

To better inform our members about the Eco-design implementation activities Orgalime continues to provide overview tables informing members on the state of play. Currently, Eco-design targets 39 product groups, for which 16 measures are now adopted and 8 are already up for review by the end of 2014.

ENERGY LABELLING DIRECTIVE

Orgalime industries fully support the Energy label that has already been successful in providing information to

consumers on energy consumption and other parameters.

Representing the views of our industries, we have monitored discussions on labelling options and on the application of the Environmental Footprint. In fact, we consistently advocate for using an extended Energy labelling instead of the Environmental Footprint.

The focus for the upcoming months will lie on the evaluation of the Energy Labelling Directive scheduled for 2014.

WASTE ELECTRICAL AND ELECTRONIC EQUIPMENT DIRECTIVE (WEEE)

The recast WEEE Directive (WEEE2) entered into force in August 2012, launching the transposition/implementation process of the Directive.

Orgalime fought hard to obtain reasonable solutions for manufacturers during the complex recast procedure. As a result, the final text takes into account many positions relevant for our industry.

The European Commission (EC) committed to including a set of codified scope exclusions in addition to the existing ones and to maintaining the scope for another 6 years (with the exception of photovoltaics). However, Orgalime remains concerned about changes after that period and the reshuffle of the existing 10 categories into 5/6.

According to WEEE2, the producer is no longer the explicit addressee of the new collection targets. This is a clear

step-by-step move towards a target on the basis of 'WEEE generated' rather than appliances placed on the market, which we welcome.

Orgalime is pleased the EC introduced a definition of a national authorised representative. It allows individual companies to fulfil the legal obligations of WEEE2 without having to establish a legal seat in each member state.

Finally, European standardisation was chosen for developing collection, recycling and treatment standards. Orgalime succeeded in avoiding the setting of separate reuse targets.

A judgment as to whether the recast brought a simplification will depend on how new provisions will be transposed/implemented in member states. Orgalime will now focus on facilitating a harmonised and effective enforcement of the WEEE legislation throughout the EU.

In a position paper published in April 2013 we included core messages for national legislators focusing on scope, financing, collection rate, shipment of used EEE, registration & producer definition, product design, treatment standards, reuse and dual use. We believe a proper implementation of WEEE2 will largely contribute to EU's wider resource efficiency policy.

Orgalime will, of course, provide input to the WEEE2 FAQ Guidance Document currently drafted by the EC.

ENERGY ROADMAP 2050

In June 2012, under the drive of Orgalime's new Energy Working Group, we issued a position paper on the Energy Roadmap 2050.

Our industry warmly welcomes the Energy Roadmap 2050 as a comprehensive and promising step for shaping the future of Europe's energy systems. We see this document as a starting point of a much needed discussion on the modernisation of Europe's current energy supply and on the development of a long term European technology framework.

Orgalime provided a set of recommendations for a smoother and more efficient implementation of the Roadmap. We believe lawmakers should now focus on two aspects: the need for establishing a common framework for smart grids and smart cities, as well as research, development, innovation and investment in promising future technologies.

ENERGY INFRASTRUCTURE

The Infrastructure Package is a relatively new piece of legislation. It was proposed in 2011 with the aim of ensuring that strategic energy networks and storage facilities are completed by 2020.


At the end of 2012, with Orgalime's full support, the Directorate General (DG) Enterprise and Industry decided to follow more closely the developments on smart grids carried out so far under the auspices of the Directorate General

(DG) Energy. This move derives from the Communication on Industrial Policy that identified smart grids as one of the 6 fast-growing areas contributing to Europe's economic recovery.

The EU Smart Grids Task Force agenda was hectic due to the discussions on the Trans-European Energy Networks (TEN-E) scope and future financing: Orgalime advocates for widening the scope of so called Projects of Common Interests (PCIs) to all levels of voltage and to decrease the threshold from 100 000 users to, ideally, 5000 users. Orgalime sees the TEN-E Regulation as a core element of Europe's future infrastructure legislation. Therefore, we will continue encouraging regulators to rapidly progress with the adoption of the draft TEN-E.

In 2012, a Communication from the EC launched the Smart Cities and Communities European Innovation Partnership focusing on the integration of energy, transport and ICT technologies and services. Orgalime supports efforts of cities and urban areas in tackling their challenges to become smart and achieving the transition towards a low carbon and resource efficient economy.

On the e-mobility front, the EC adopted a proposal for a Directive on the deployment of alternative fuels infrastructure. We are pleased to see the proposal for binding targets for a minimum number of recharging points in each member state.



Orgalime's Task Force Infrastructure will assess the proposal in detail and provide input.

ENERGY EFFICIENCY DIRECTIVE (EED)

In October 2012, the EED was adopted. Member states are obliged to transpose it into national law by 5 June 2014 at the latest.

Our industry is continuously improving the energy use in its own processes and engineering companies also provide key technology solutions addressing the challenges posed by climate change, sustainable consumption and production, as well as the energy security agenda.

Consequently, Orgalime welcomed especially three elements of the EED: targets for the renovation of public buildings, promotion of energy performance contracting and demand response programmes, as well as the obligation to provide information to consumers on their meters and bills.

However, we expressed our regret that the overall level of ambition was lower than might have been expected. Orgalime sees the planned measures as insufficient for achieving the 20% efficiency target by 2020. Therefore, we call for a harmonised, timely and as ambitious as possible implementation of the Directive and will continue encouraging member states to exceed the proposed requirements.

As a next step, Orgalime will put forward our industry's view, contributing to the guideline documents for the main EED provisions.

RESTRICTION OF HAZARDOUS SUBSTANCES DIRECTIVE (ROHS)

The RoHS Recast Directive (RoHS2) entered into force 21 July 2011. Consequently, the RoHS1 Directive was repealed with effect from 3 January 2013.

It must be stressed that RoHS2 does not stand alone. It comes into an area already heavily regulated primarily by the Registration, Evaluation, Authorisation and Restriction of Chemicals Regulation (REACH), but also by the Eco-design Directive and the New Legislative Framework (NLF). Orgalime considers overlaps between RoHS2 and the existing legal instruments a risk to the overall consistency of the EU's chemical legislation that can severely impact our industry.

Manufacturers of electrical and electronic equipment are drawing attention particularly to the legislative inconsistencies between RoHS2 and

REACH. In a position paper published in March 2013 Orgalime identified areas of risk and suggested concrete solutions to maximise complementarity, consistency and coherence between these two legal instruments.

An important point was raised by Orgalime regarding Article 2.2 of the Recast Directive. As stressed, if the initial definition of 'making (products) available' were applied, it would have significant negative economic, environmental and legal impacts. Therefore, we are pleased our suggestion to use the phrase 'place on the market' instead of 'make available' was taken up by the Directorate General (DG) Environment.

Following the Recast, the EC published a revised RoHS2 FAQ Guidance Document. After a careful analysis, Orgalime challenged this document in the areas of scope and the substance restrictions' methodology, for which we seek maximum coherence with REACH.

In September 2012 we updated our RoHS2 Guide which serves as our industry's own guidance tool for the implementation of the Directive. It is available on the Orgalime website.

REGISTRATION, EVALUATION, AUTHORISATION AND RESTRICTION OF CHEMICALS (REACH)

In February 2013, the European Commission (EC) published the long-awaited REACH Review Report. It concluded REACH functions well, but that there is a pressing need

to reduce its impact on Small and Medium Enterprises (SMEs). Therefore, the EC, as we and many others requested, committed to leaving the existing Regulation unchanged and will now focus solely on improving implementation.

Orgalime welcomes this commitment to regulatory predictability and stability which we see as one of the key factors for attracting industrial investment back into Europe and, with this, new employment, which is sorely needed at this time.

However, Orgalime still maintains that lawmakers face a challenge of avoiding authorisation and restriction overlaps with sectoral legislation.

Regarding nanomaterials, the REACH Review Report ties in with the 2nd Regulatory Review on Nanomaterials the EC published in October 2012. Both documents confirm REACH provides the best possible framework for risk management of such substances. As a next step, the EC plans assessing regulatory options for nanomaterials under the REACH Regulation.

On the REACH implementation side, Orgalime has been closely monitoring the developments in the Candidate List of the Substances of Very High Concern (CL SVHC), which currently includes 138 items.

Primarily, we raised concerns on the European Chemical Agency (ECHA)'s intention to include chromium trioxide



in the Authorisation List (Annex XIV REACH). Orgalime therefore addressed a letter to the EC, particularly challenging ECHA's reluctance to grant necessary exemptions where technically or economically feasible substitutes of chromium trioxide are not available.

Banning the use of certain substances, where no substitute exists and where the substance is not found in the final product just means that production operations and jobs shift out of the EU. This is neither helpful for the environment, nor crucially for industrial value chains and employment.

Another hot issue on the REACH implementation agenda related to different interpretations of the 0.1% SVHC concentration limit in products. Initially, some member states advocated the 0.1% threshold should apply to each separate component. However, our industry consistently stressed it should concern the whole article as produced/imported. The EC and ECHA supported Orgalime's position, emphasising another interpretation will be considered as an infringement of the REACH Regulation.

Orgalime continues to be involved in the many fora which have been set up to help in the implementation of the Regulation.

INDUSTRIAL EMISSIONS DIRECTIVE (IED)

In September 2012 the European Commission (EC) and European Integrated Pollution Prevention and Control (IPPC) Bureau (EIPPCB) jointly proposed a work programme for

the compilation and review of Best Available Techniques reference documents (BREFs) for the period 2013 onwards.

Orgalime actively represents our industry in the stakeholder committee ensuring BREFs and binding Best Available Techniques (BAT) conclusions tie in well with the state of the art.

Therefore, we especially emphasise that: the quality of BREFs should prevail over their quantity; stronger focus on BAT conclusions must not overlook other essential technical, economic information and the confidentiality of certain business data; and overlapping requirements need to be avoided.

Moreover, Orgalime expressed its negative opinion about recent EC activities to assess the possibility of extending the IED's scope to small combustion installations below a total rated thermal input of 50 MW. Such an approach will negatively impact Small and Medium Enterprises (SMEs) during the recast process of the IPPC Directive.

This is all the more unacceptable at a time when the institutions are regularly committing themselves to support SMEs.

ARE WE IN THE TIMES OF THE UNSTOPPABLE RISE OF COMMUNICATIONS?

A striking headline to catch your attention! But it's worked, hasn't it?

Everyone in Orgalime is, and should feel, responsible for organisational communication. For the communication wheels to keep turning, every co-worker has the right and indeed the responsibility to stay informed and 'communicate' – passing on the 'message' throughout the entire organisation. So big or small, at the centre or on the periphery, everyone keeps the wheels metaphorically lubricated.

HOW WILL THINGS LOOK IN 2020 THOUGH?

When the Fortune 500 corporate communicators were surveyed the top 5 most coveted skills for 2020 are more or less similar as today:

1. Influencing
2. Business acumen
3. Technology savvy
4. Effective people management
5. Writing skills.

The first and last are perhaps no surprise, as influencing target audiences with tailored messages cannot be achieved one without the other. But being more aware of the business model upon which your organisation depends would put most communicators out of their comfort zone today! That, coupled with the trying to stem the tide of new technologies (and how best to apply them) and confronting the 'war for talent' in global HR terms is starting to have an impact on people management skills.

The way end-users receive their information will soon have permanently changed to mobile digital media – that means the way we deliver our news needs to adapt. Ignore this at your peril! Mobile media is forecast to be disruptive, engaging, interactive and controversial, but truly international – language barriers will have been smashed as simultaneous on-line translation is afforded to each and every owner of a mobile device.

WHAT WE WON'T SEE IN 2020

The communications fraternity believes that excessive communication can be damaging, essentially wasteful. There is an evident decline in printed material – those annual reports, brochures and other corporate propaganda are beginning to be moved to 'on-line' content. And, with the continued rise of social platforms, the good old newsletter should also progressively fall into the annals of communication history.

Hail the rise of dynamic communication initiatives – internal and external communications will target specific segments of the global community with two-way dialogue.

A FUTURE-READY ORGALIME...?

We are dynamic and will continue to adapt to the needs of our industry, constrained only by budgetary restrictions and a lack of imagination. Taking the pulse of the communication world on a regular basis is a 'must do' activity. The warning signs are there in abundance – improvise, adapt and overcome in order to keep your head above the parapet!



Mark Redgrove



Magdalena
Wawrzonkowska

PUBLICATIONS

Besides the many guides Orgalime publishes on European legislation, Orgalime has developed a considerable body of legal publications: these aim to provide the European engineering industries with documents that can help industry to draw up adequate business contracts and give practical advice on frequently occurring legal questions. The publications are, for the most part, drafted by Orgalime's member association lawyers. The first Orgalime legal publication was issued in the 1950s and the current listing now includes 27 titles, some of which have been revised several times in order to adapt to new or changing legislation.

RELEASE OF ORGALIME'S S 2012 GENERAL CONDITIONS

In the autumn of 2012, Orgalime released the S 2012 general conditions, '*General conditions for the supply of mechanical, electrical and electronic products*', a revision of the S 2000 general conditions (August 2000) that has proven to be Orgalime's most successful publication, selling well over 1,000,000 hard copies since its publication and the biggest draw to our licensing website, where hundreds of companies from all over the world have purchased a licence for the use of Orgalime's standardised conditions in electronic format.

As the international sale of products represents the core business of companies in the engineering industries in Europe, Orgalime soon recognised that these companies would benefit from a set of standardised general conditions for the supply of products, which could be used worldwide. The first version of the Orgalime Supply Conditions were published as long ago as 1992 (S 92

conditions) and these conditions have ever since been among Orgalime's most widely-used legal publications.

The authors of the publication, lawyers representing the national member associations of Orgalime, reviewed the S 2000 conditions in detail, supported by their experience in dealing with legal contracts in the engineering world and their attentive study of current legal developments. They unanimously concluded that the Orgalime Supply conditions have been widely accepted and endorsed in international business and meet the parties' needs. Thus, the review work performed is considered to be an update of the S 2000 conditions.

Some material changes have also been applied to this update. New texts inserted and existing texts amended. Aside from these modifications, the wording has been revised in order for the meaning to be as clear as possible. These changes have, however, not changed the well-balanced nature of the conditions.

To keep up with the increasing popularity and acceptance of our general conditions by companies throughout Europe and worldwide and, in order to assist companies from our industries who wish to expand their horizons, Orgalime has broadened the scope of available language versions of its new S 2012 publication to include the following 18 languages: English, German, French, Czech, Danish, Dutch, Hungarian, Italian, Polish, Portuguese, Slovakian, Spanish, Swedish, Arabic, Chinese, Japanese, Russian and Turkish.

To date, there are 9 different sets of Orgalime general conditions designed to give concrete and comprehensive solutions to the most practical problems encountered by companies trying to reach an agreement in business to business transactions. Our legal publications may be purchased from our member associations or as a licence from our licensing website:

<http://licensing.orgalime.org>



ORGALIME LICENSING WEBSITE – 10 YEARS

In June 2013, Orgalime's licensing website will be celebrating its 10th anniversary! This tool created to offer companies situated in Europe and worldwide a simple, efficient and fast way of obtaining and using Orgalime general conditions in an electronic format started small but soon proved to be a big hit. Year-on-year, the interest for the general conditions that Orgalime proposes through this service reaches ever more companies in the industry we represent, confirming the high esteem and reputation in which are held Orgalime publications.

IN 2013

Subsequent to the update of the S 2012 general conditions, many of our legal publications are undergoing a review and will be published after their final approval. This concerns mainly the following publications that have all replied to the needs of the industry we represent, as can be attested by their success with companies since their publication:

- Supplementary conditions for the supervision of erection of mechanical, electrical and electronic products, delivered in accordance with S 2000 (S 2000S)
- General conditions for computer software, supplement to Orgalime S 2000 & SE 01 (SW 01)
- General conditions for the supply and erection of mechanical, electrical and electronic products (SE 01)
- Guide on S 2000





Market surveillance by authorities has been a key issue during the past year and will continue to be so for the foreseeable future. We support cooperation with market surveillance authorities and have asked the authorities for an increased and more efficient approach to control products on the market. The topic was the subject of an event at the European Parliament and the launch of a collaborative on-line Platform for capital goods.

ORGALIME PARTNERSHIP

The Orgalime Partnership - the Orgalime department that serves sector associations of the engineering industry in Europe - has increased its activities this year. The scope of services offered ranges from tailored information services to active advocacy, from association management to increased visibility on the Brussels scene, and from optimisation of communication strategy to membership management.

This year, 4 new associations signed up to Orgalime Partnership services: Eurovent, for communication and monitoring, the European Irrigation Association (EIA) for hosting the association in Brussels, Europacable for monitoring, and the association representing heating, ventilation air conditioning and plumbing contractors (GCI-UICP) for general secretariat services. This brings the total number of organisations serviced to 22. The Orgalime Partnership is committed to long-term cooperation with our customers, a sentiment also shared by them.

Because the Orgalime Partnership only supports associations of the engineering industries, it means that we understand both the general economic context and the challenges faced by these industries. These challenges not only include maintaining the technical 'edge',

but also the need for effective market surveillance by authorities. Having innovative, high-performing, safe, environmentally-friendly and energy efficient products is not enough, if the industry and its related services are to stay in Europe: market surveillance by authorities is essential and has been a key issue during the past year and will continue to be so for the foreseeable future. We support cooperation with market surveillance authorities and have asked the authorities for an increased and more efficient approach to control products on the market. The topic was the subject of an event at the European Parliament (EP) and the launch of a collaborative on-line Platform for capital goods, including sectors serviced by the Orgalime Partnership.

Our clients know of the requirement to reshape their associations to reflect economic and societal challenges as the market dictates. We also reflect and offer to adapt our services to help our customers in their strategic thinking and strategy and action plans as necessary.

We have the dual task of delivering a professional service to our customers and supporting them in the services they provide to their members, all the more so as the context is becoming more complex both at political and at association level. There are increasing expectations of return on investment from association members.

As the European Union continues to publish new proposals and studies, the Orgalime Partnership is helping to analyse them and to react: there have been preparatory studies for energy-related products, a new Eco-design working plan, progress on the F-gas proposal and market surveillance packages, selection of members for the European Innovation Partnership for water and forward movement on energy policies. The level of advocacy work of course depends on the level of service required by each and every one of the associations we serve: from monitoring to active positioning at the European Parliament, Council or European Commission (EC).

The Orgalime Partnership has also supported clients in their communications off- and on-line. Be it Twitter feeds or blog posts, press releases or position papers, through to updating and optimising websites and organising conferences and workshops. We have also organised meetings with EU officials to promote the sector's positions. We are proud to be able to accompany our customers in their advocacy activities.

These last 12 months, the Orgalime Partnership has also launched a '*Water Platform*' and a services brochure. The '*Water Platform*' was a horizontal multi-sectoral Platform which during the EC Green Week 2012 promoted the solutions that companies and associations in our industry offer in the area of water management and treatment.

A survey of clients was also conducted to establish the popularity of the Orgalime Partnership Bulletin, our filtered newsletter which is published 5 times per year. Overall, 94% of respondents were satisfied or extremely satisfied with the Bulletin!

A FEW OF THE ACHIEVEMENTS IN 2012:

AREA: booth at the Chillventa fair (air conditioning, refrigeration & heat pumps) in October 2012 in Nuremberg + two side events (a conference and a cocktail).

ESMIG: very active in workshops/ events/reports supported by in-house multimedia.

FEM, AREA and Europerf: now have LinkedIn Groups to communicate more widely on their activities.

FEM: setting-up of an international alliance with counterparts in China, Japan and the US. The first official meeting took place in January 2013.

EGMF: 'We have connections to nature' conference.

Europump + Pneurop: kick-off event for Eco-design Lots 28/29/31.

CEIR: Water Label launched at Green Week 2012.

T&D: co-organisers of Smart Energy and Sustainable ICT Conference with European Commission DG Energy and DG Connect.

T&D: selected for participation in EU FP7 Highway 2050 project.



Guy Van Doorslaer



Pierre Lucas



Olivier Janin



Stéphanie Uny



Rozenn Maréchal



Zoi Mylona



Nicolle Raven



Janet Almond



Ioana Smarandache

MEMBERS

38 MEMBER ASSOCIATIONS – 23 COUNTRIES

130,000 companies – €1,840 billion of annual output – 10.3 million people employed

AUSTRIA

FEEI FMMI



BELGIUM

AGORIA



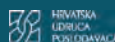
BULGARIA

BASSEL



CROATIA

HGK HUP



DENMARK

DI



Organisation for erhvervslivet

FINLAND

THE FEDERATION OF FINNISH
TECHNOLOGY INDUSTRIES

The Federation of Finnish
Technology Industries

FRANCE

FIEEC FIM



GERMANY

VDMA WSM ZVEI



GREAT BRITAIN

BEAMA EAMA GAMBICA



HUNGARY

MAGEOSZ



IRELAND

IEEF



ITALY

ANIE ANIMA



LATVIA

MASOC



LITHUANIA

LINPRA



LUXEMBOURG

ILTM



THE NETHERLANDS

FME-CWM METAALUNIE



NORWAY

NORSK INDUSTRI



POLAND

PIGE



PORTUGAL

AIMMAP ANEME



SLOVENIA

GZS-MPIA



SPAIN

CONFEMETAL SERCOBE



SWEDEN

TEKNIKFÖRETAGEN



Teknikföretagen

SWITZERLAND

SWISSMEM



EUROPEAN SECTOR ASSOCIATIONS

CEIR EFCCEM EGMF EUROPUMP





THE EUROPEAN ENGINEERING INDUSTRIES ASSOCIATION

“DIAMANT BUILDING”,
BOULEVARD A. REYERS 80, B-1030 BRUSSELS
TEL: (+32) 2 706 82 35, FAX: (+32) 2 706 82 50, SECRETARIAT@ORGALIME.ORG
WWW.ORGALIME.ORG