

Harnessing the opportunities of a globalised Europe

Focus on Association Management

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I - Association Trends in Europe

- **The new EU geography**
- **Association Trends**

Europe : What a Market!

27 Member States, 23 Official Languages



Association Trends in Europe

- **Increase in “Association Creation”**
- **New lobbying playing field**
- **Shift from Policies to Standards (EU and global)**
- **Greater role of Civil Society**
- **European Associations are now Global Assocs.**

Association Trends in Europe

- Association management is not truly recognised so far as a “profession” in Europe, but...
- Over 70% of EU business associations are located in Brussels
- Majority are federations
 - ~ 65% are federations (assocs. only)
 - ~ 25% are mixed membership structure (companies and assocs.)
 - ~ 10% are direct membership (companies only)

II - EU - US

- **An important relationship**
- **Role of the Transatlantic Business Dialogue**

EU – US: An Important Relationship

	US	EU25	EU15	Euro- Zone
Area (2003 thousands, km sq)	9,631	3,893	3,154	2,456
Population (2003 millions)	293.03	454.56	380.36	306.70
GDP (2003, current prices, USD billions)	11,000	11,017	10,522	8,209
GDP increase, 2002-03	3.10%	0.90%	0.80%	0.50%
GDP per Capita (2003, in PPS/inhabitant)	37,756	24,027	27,511	26,595
Total Imports (2003 USD billions)	1,517	1,047	1,570	2,848
Total Exports (2003 USD billions)	1,021	1,250	1,633	3,025
% of EU25 Exports to US (Quarter 1 2006)		24.00%		
% of EU25 Imports from US (Quarter 1 2006)		15.20%		
% of US Exports to EU25 (Quarter 1 2006)	21.10			
% of EU25 Imports from US (Quarter 1 2006)	19.10			

EU – US: Role of the TABD

- Since its re-launch in 2003, 30 CEOs meet alongside EU-US Summits
- **Goal:** to boost transatlantic trade and investment through the removal of barriers caused by regulatory differences
- **Successes:** Providing valuable input into the process of transatlantic economical integration and pushing forward horizontal integration
 - Example 1: The EU-US Summit in 2005, a roadmap for governments to “recognise the need of a deeper integration through regulatory harmonisation” ≈ position of TABD
 - Example 2: Helped to shape the restart of the Lisbon Agenda with an increased economic focus.
- **Now: A Transatlantic Economic Council (TEC), has been set up by US and EU governments to further transatlantic economic integration, which will hold its first meeting later in the autumn**

EU – US: More business developments

- 'Framework for advancing Transatlantic Economic Integration' signed in 2007
 - 5 lighthouse priority projects
 - IPR
 - Secure trade (secure, safe international supply chains)
 - Financial Markets (accounting & reporting standards)
 - Innovations and Technology (incl. health, RFID, research)
 - Reduction of obstacles to investment
 - Open Skies Agreement

III - EU – US – and Beyond

- Policy Migration
- The Role of China

Policy Migration

- Policy Migration : *“the setting up of similar policies based on previous policies already implemented elsewhere”*
- European environmental legislation on
 - Hazardous substances,
 - Waste, and
 - Chemicals
- Applies to all companies marketing in the EU
- Global implications – China’s legislation
- Global implications – role for associations

Global Impact of EU law

- Recent example:
 - Microsoft court ruling – September 2007
 - Implications for global software industry due to promotion of interoperability;
 - Apple, Google and Intel now may be affected

IV - Brussels: a new centre of importance

- Enlargement effects
- New lobbying codes: the European Transparency Initiative

A few facts about Brussels

Home to:

- the EU institutions
- NATO
- 120 international governmental organisations
- 15,000 lobbyists
- ~1,400 companies and interest groups (including associations)
- 159 Embassies
- 2,500 diplomats
- 31% of the population is of foreign origin

EU Enlargement Impacts – 2004 & 2007

- **2004 Enlargement Impact on EU Member States' Associations and EU Associations:**
 - New coalitions building on European Issues
 - Associations in new EU countries educated members
 - EU umbrella federations felt new challenges
 - Dilution of big players' influence at EU level
 - New facts and figures in each sector; change of benchmarks
- **2007 Impact on EU Member States' Associations and EU Associations:**
 - New awareness needed of market reality in terms of competition, M&A, opportunities, obstacles, growth areas and markets
 - Maintain alliances, create new innovative partnerships with national and local authorities and industries

European Transparency Initiative

- Launched in late-2005, aims to increase the EU's voice with its citizens through being more open
- Three-pronged initiative:
 1. Transparency and Interest Representation
 - Codes on lobbying
 2. The Commission's minimum standards for consultation
 3. Publication of Data on Beneficiaries of EU Funds
 - Data from EU and its Member States EU Associations

The World's in Brussels...are you?



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