



The European Economic and Social Committee

WHICH SINGLE MARKET BEYOND THE €URO?

*Economic and Social Committee
of the European Community*

HEARING

WHICH SINGLE MARKET BEYOND THE €URO?

15 September 1998

Organised by the

**MARKET
LABORATORY**

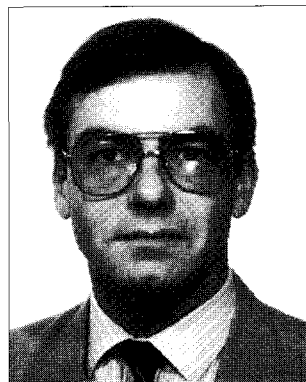


***Which Single Market
beyond the Euro?***

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FOREWORD



The Single Market Observatory (SMO) was set up in 1994 by the Economic and Social Committee, with the support of the Parliament, the Council and the Commission, to assess the functioning of the Single Market specifically from the point of view of economic and social players. It provides an ongoing link between the European institutions and the various participants in the Single Market (businesses, employees, the self-employed and consumers).

Although it works in close cooperation with the European Commission, the SMO carries out its own investigations. It regularly organizes Hearings, both in Brussels and in various countries and regions. The Hearings held in recent months have addressed a wide range of issues related to the Single Market: the environment, consumers and insurance, freedom of establishment, cross-border trade, the impact of the single currency, the effects of enlargement. By collating the extensive body of first-hand evidence gained in this way, the SMO is able to highlight expectations and enhance the effectiveness of initiatives in the field. The SMO pays particular attention to the effects of the Single Market on the competitiveness of businesses, employment and economic, regional and social development.

In addition to Hearings on specific topics, every year the SMO organizes a general Hearing to take stock of the overall situation. The 1998 Hearing was held on 15 September on the theme of Which Single Market beyond the Euro? Three major findings emerged from this Hearing:

The first point to note is that economic and social players continue to paint a contrasting picture of the way the Single Market operates. While it is acknowledged that progress has been made on broad front, there are still many shortcomings, such as disparities in tax levels; lack of social harmonization; inadequate arrangements for pro-

protecting intellectual property; lack of incentives for businesses to merge or work more closely with each other. The introduction of the Euro will heighten the need to remedy these shortcomings;

The second fact to emerge is that the effectiveness of the Single Market does not depend on the number of directives. Difficulties frequently arise because of the excessive complexity of Community rules. But it is also up to Member States to improve the situation at national level: transposition of directives into national law, mutual recognition, opening up of public procurement markets, preventing new barriers from arising. *The smooth functioning of the Single Market on a continuing basis implies shared responsibility;*

The third finding is that stakeholders want to be more directly involved in monitoring the Single Market. Their contribution seems essential for assessing the actual situation and defining priority areas for action. Their views should be given more emphasis in the *Commission's half-yearly Scoreboards*. The new opportunities offered by the Internet should be exploited through an interactive site on the Single Market, accessible to all economic and social players.

Economic and social players can already send their comments to the SMO via its Internet site: www.esc.eu.int. (e-mail: smo@ces.be). Starting from 1999, the SMO will be *keeping a particularly close watch on the effects of the introduction of the Euro*. More than any new deadline at political level, it is the Euro and the way it is used in practice which will henceforth be the main driving force behind the achievement of a true European Single Market.

Bruno Vever
President of the Single Market Observatory

REPORT OF PROCEEDINGS

The Single Market Observatory (SMO) of the Economic and Social Committee of the European Communities (ESC)¹ held its third general Hearing on the Single Market, entitled "Which Single Market beyond the Euro?"; at its Headquarters in Brussels on 15 September 1998. The Hearing was chaired by the President of the ESC Single Market Standing Study Group, Mr Bruno Vever. Approximately 150 representatives of European economic and social interest groups (from EU Member States, EFTA countries and Central and East European countries (CEECs)) attended the Hearing.

Mr Giacomo Regaldo, Vice-President of the ESC, and Mr John Little, President of the ESC Section for Industry, Commerce, Crafts and Services, welcomed participants, underlining the importance of holding the Hearing at this point in time - three months before the expiry of the Commission Action Plan on the Single Market which coincides with the introduction of the Euro, and in view of the forthcoming enlargement of the European Union.

Mr Little recalled that in 1994 the ESC had agreed, at the suggestion of the European Commission, the European Parliament and the Council of Ministers to undertake the role of monitoring and evaluating the Single Market and reporting thereon. This was done by analysing information from regular meetings of the Committee, through dialogue with socio-economic and other interest groups and through investigative work involving hearings. The title "Single Market Observatory" had been adopted to encompass all such activities, and they were carried out under the wing of the ESC Industry Section. Being independent, the ESC was well placed not only to monitor and report, but also to exert pressure on the Institutions and Member States and to promote public awareness of both opportunities and problems within the Single Market.

The first general Hearing organized by the Single Market Observatory, had taken place in June 1994, and 62 obstacles to the completion of the Single Market had been identified. The second general Hearing of March 1997 had concluded that some of the previous obstacles still persisted and that certain new ones had been created. In addition to general Hearings, investigative work had been conducted into sectoral aspects and a number of horizontal facets.

Mr Little recalled that the ESC had, from the outset, welcomed the Commission Action Plan of 4 June 1997 and the Scoreboards emanating from it. He underlined the importance of politicians, companies and citizens all contributing to the completion of the Single Market and considered that the present Hearing was a step in the right direction.

1) The Economic and Social Committee is an independent body set up under the European Treaties to advise the European Commission, the European Parliament and the Council of the views of those it represents, namely the various categories of economic and social activity throughout the EU. The Committee's primary role is to give Opinions on proposals for legislation being considered by the aforementioned institutions, but the Committee can also act on its own initiative.

Mr Mogg, Director-General of DG XV, underlined that the Commission greatly valued the work carried out by the ESC and recognized the ESC contribution to the Action Plan.

Mr Mogg paid tribute to what he described as the impeccable methodology and timing of the ESC Hearing. The Single Market Observatory had already successfully accomplished a great deal and he was happy the ESC was interested in contributing to refine the Single Market instruments.

He pointed out that the Single Market and the advent of the single currency had played an important role in adding resilience to the EU's economy and financial markets. Even though there had been downward movements on European Stock Exchanges as a consequence of the crisis in Asia, there had been no loss of confidence to the extent seen elsewhere.

The Single Market was on the right track. Mr Mogg underlined, however, that simply pointing in the right direction was not sufficient; efforts were needed to ensure the completion of the Single Market and making it function well was an on-going process. To secure investors' confidence, industry would have to continue to meet challenges and adapt to changing market conditions and Member States would have to continue the work of transposing legislation.

From June 1997 to June 1998, the percentage of Directives not yet implemented in all Member States had fallen by half, but 18 per cent of Directives were still not implemented in all Member States. Mr Mogg informed the meeting that more detailed information could be found in the latest version of the Scoreboard, and that a third version of the Scoreboard would be published in November.

*Uniform enforcement of Single Market rules by national authorities was very important to ensure a real **Single** Market.* In accordance with the Action Plan, Member States had established co-ordination centres and contact points for business and citizens.

The Scoreboard had been very useful in providing information and had proved to be an effective means of using peer pressure to encourage Member States to ensure compliance with Single Market rules. It would be interesting to see how this peer pressure could be stimulated, thereby improving Single Market operation. He underlined that the Commission wanted to solve the problems quickly and pragmatically, but, at the same time, efforts were being made to streamline the infringement procedures. Suspected violations of Single Market rules accounted for almost half of all Commission infringement cases. Last year the number of infringement cases opened by the Commission increased by 23 per cent, but a growing proportion of cases were resolved by negotiation before reaching the Court of Justice.

Pointing to the benefits of informatics and particularly the interactive exchange of information, Mr Mogg singled out raising awareness as the most important step towards the better and wider use of Single Market rules. The experience drawn from the phone-in "Citizens First" programme had helped launch the "Dialogue with Citizens" and the "Dialogue with Business" would follow by end 1998.

Simplification of rules and procedures was central to the Action Plan strategy. The SLIM (Simpler Legislation in the Internal Market) initiative was starting to bear fruit in terms of e.g. reduced reporting requirements for intra-EU trade (Intrastat) and easier recognition of diplomas. With BEST (Business Environment Simplification Task Force), the scope was being extended to include national simplification measures.

Mr Mogg recalled that the Action Plan had been at the heart of the efforts over the last few years and would continue. Many targets had been met and the report to the European Council in December 1998 would be positive. However, important work still remained to be done, inter alia on the European Company Statute. As a considerable achievement in an area where the EU had hitherto "feared to tread", he mentioned the code of conduct on tax.

Mr Mogg drew attention to the interdependence of the Single Market and the single currency, pointing out that the Euro would enhance the Single Market. The collective interest in ensuring closer political co-ordination and co-operation to avoid economic distortions would be increased by the advent of the single currency. It was important to anticipate possible distortive shocks and discourage unfair behaviour. At the macro-economic level a framework had been provided by the Growth and Stability Pact and the European Central Bank's independent monetary policy. Multilateral surveillance of economic reforms in the labour, product and capital markets would provide a framework for effective structural reforms at the micro-economic level. The Cardiff European Council had recognized the need for closer co-ordination of policy-making and had called upon the Commission and Member States to report on the functioning of these markets. The Commission was, therefore, preparing a report on economic and structural reform to identify what still needed to be done to remove obstacles to market integration.

As for financial services, the Commission was, at the request of the Cardiff European Council, working on a framework for action to be presented to the Vienna European Council in December. The Commission had recently organized a first hearing for input from industry and consumer representatives.

Mr Mogg stated that over the years greater awareness had been achieved of where the real problems lay and of the genuine possibilities for resolving them. The Commission attached great importance to listening to people confronted on a daily basis with the reality of Single Market-related problems. A pilot project entitled the "Business Test Panel" had been launched with a view to having quick reactions to possible legislation. Information was needed to ensure that potential shocks were foreseen. Most information was, however, needed at the micro level, which was a reason why the importance of the ESC was growing - it was the European body most closely in touch with what was happening on the ground.

Mr Mogg closed by saying that one of the priority challenges was to work out how to shape a competitive financial services policy, bearing in mind the constantly changing market conditions.

Mr Vever thanked Mr Mogg, stating his appreciation for the attention paid by the

Commission to the users of the Single Market who were of course the truly important players. This was why the SMO attached great importance to the present Hearing.

Mr Vever recalled that the first general Hearing organised in 1994 by the SMO had been devoted to assessing the 1985 Single Market White Paper and had noted 62 major remaining obstacles. The second Hearing in 1997 had concluded that more than half of the obstacles identified by the ESC in 1994 still persisted and that new obstacles had been created, particularly at national level. On that occasion the ESC had pleaded for a new action plan targeted on the 1999 deadline for the Euro, a view taken over by the Commission in presenting the Monti Plan.

The present Hearing, the third, met at a different juncture. The Action Plan would end in three months just when the Euro was being introduced. The latest version of the Scoreboard showed a positive trend in the transposition rate (65% of all Directives in all Member States in June 1997, 82% in June 1998). Out of 62 commitments contained in the Action Plan, 23 had been honoured completely. Mr Vever asked participants to pinpoint what they saw as the most important priorities for completing the Single Market.

Mr Vever pointed to the advent of the Euro as the biggest step forward for the Single Market: the Euro's impact would be bigger than any information campaign. However, this event would not sort out all the problems; some would perhaps even be made worse. He compared the Single Market to a car, the "Europamobile", fitted with a new high-performance engine "the Euro", but with other weaknesses unsolved which would highlight the problems. Lack of precision in the steering and lack of visibility (what economic government?), weaknesses in the chassis (what cohesion?), lack of synchronisation in the suspension (what structural and social adjustments?), would reveal their shortcomings more clearly as soon as one changed to a higher gear. It was necessary to concentrate on new contingencies caused by the Euro's presence.

Enlargement in its turn would lead in time to an increase of around 100 million in the EU's population and from 15 to 26 in the number of member countries. With more member States the European Union would be more complex. It would be even more important for the Single Market to work properly. He stressed the need to tighten up the rules and to insist on a certain number of questions in the final phase of completing the Single Market.

Mr Vever defined the objective of the Hearing as follows: first, present as faithful a picture as possible of the state of the Single Market and second, set priorities for the future.

Mr Vever pointed out that a survey had been carried out and 87 responses analysed. He indicated the main findings.

CONCLUSIONS OF THE MORNING WORKSHOPS

Workshop I: Efficiency and simplification of rules

Mr Jaschick, Workshop I Rapporteur, presented the following conclusions: The complexity of rules, large number of forms to be completed and general administrative burden caused distortions of competition and costs, felt particularly by SMEs. Packaging and labelling requirements inter alia for chemical substances were given as an area whose complexity caused relatively higher costs. There was a clear call for simplification. It was, however, essential to focus on simplification which would lead to improvements in practice. In the environmental field the failure to define waste precisely caused problems. The importance of mutual recognition was underlined as a means of eliminating obstacles. Language barriers and terminology required attention.

A Polish employers' representative had pointed out that only a very small percentage of Poles had sufficient knowledge of the EU, the Single Market and the Euro and called on the SMO to launch an information campaign for the Central and East European Countries which should focus on the preparatory phase preceding enlargement.

As for consumers, it was stated that much of the information originating in Brussels was unclear and often did not reach the population in a satisfactory way.

Workshop II: Economic and fiscal challenges

Mr Burani, Workshop II Rapporteur, presented the following conclusions: Participants all agreed that a stable Euro was the foundation of a stable and strong Single Market. A Swiss business representative had stressed the importance of a strong Euro for Switzerland. The idea that the introduction of the Euro would increase transparency and competition was accepted by all.

It had also emerged from the discussion that even if the Euro was a single currency, it would not have a single purchasing power because of differences in price formation in the different member States. Price differences for services would be greater than for goods. Differences in tax systems, wages and social expenditure were all factors that influenced the situation.

A distinction had been drawn between financial products and financial services with the conclusion that integration of the financial market for products was far more advanced than for services, with serious consequences especially for small and medium-sized enterprises (SMEs) who depended on such services.

One comment had been that the arrival of the Euro had done more for the harmonisation of financial markets than all the Community's Directives so that the Euro had played a key role even before being formally introduced.

Mr Burani said the central point in discussion had been taxation and that several speakers had expressed the desire for a certain alignment of national policies. The

main problem was the link between fiscal policy, social policy and pensions, bearing in mind demographic trends.

The representative of the European Federation for Retirement Provision (EFRP) had felt that the introduction of the Euro would not have any immediate impact on pensions. However, she had drawn attention to the difference between statutory pensions and supplementary pensions. Not only were there big differences between countries' funding systems, tax barriers were also most harmful in respect of supplementary pensions and it was important to lay down a blueprint for limiting the damage caused.

The discussion on statistical issues had been short. Although much had been done to improve the quality of statistical information, it was still difficult to obtain objective and compatible information. Statistical matters had to be tackled pragmatically.

Workshop III: Adjustments of the labour market

Mr Liverani, Workshop III Rapporteur, presented the following conclusions: Free movement of persons was the most relative of the four freedoms. Taxation and supplementary pensions had been mentioned earlier as being two major constraints on freedom of movement for persons and another was the delay in recognising diplomas and professional qualifications.

The Euro market would improve comparability. Differences between countries in working conditions would become more visible. Social measures were lagging behind economic ones. Some degree of social harmonisation was important and instruments had to be provided for this. The Commission should help ensure further development of the European social model. There had to be a stable Euro but also a stable labour market.

Summing-up by the President of the Hearing

From the points raised in the three morning Workshops, **Mr Vever** drew the following conclusions: speakers had laid more stress on problems than on the progress made. It was necessary to simplify rules (at EU and national level), bring economies and taxation systems closer together and adjust the labour market. He emphasised that rules had to be operational in practice. The introduction of the Euro would highlight differences and make adjustments more urgent. A certain degree of pressure was needed to provide momentum and economic and social interests had an important role to play, among other things to help define the level of regulation necessary in the social field.

CONCLUSIONS OF THE AFTERNOON WORKSHOPS

Workshop IV: Trans-national company strategies

Mr Muller, Workshop IV Rapporteur, presented the following conclusions: The Single Market and the Euro were important for promoting cross-border co-operation. Several participants detected a trend towards protectionism. Public procurement continued to show how far the Single Market still was from being complete – a field particularly difficult for SMEs. Problems also arose over deciding terms of reference whether national, regional or local. Red tape set major hurdles in the way of cross-border activities.

The Workshop had identified the main problem areas as: standards, public procurement and taxation, especially VAT. It was also very important for work on the European Company Statute to be completed. There was consensus that SMEs needed a more sensitive and effective aid policy.

Very often there was too much information, rather than not enough. Efforts to complete the Single Market were needed at all levels, European and national, by administrations and Governments, by economic and social interest groups and by companies.

Workshop V: The challenges of the information society

Mr Vasco Cal, Workshop V Rapporteur, presented the following conclusions: Strategic problems and global challenges were linked to the information society, the main question being how and if it should be regulated. A balance was needed to give everyone access to the information society and to avoid problems of social and regional exclusion. The costs of Internet access and copyright were two key factors.

The Commission's decision to put many of its documents on the Internet was thought very useful with around 700,000 visits per month to the website. The Council had not provided so much access. There was thought on whether the ESC's site met needs. The Workshop also debated the value of introducing IT education tools so as to raise levels of knowledge on European issues.

One fast growing area was electronic commerce. More work was needed on (i) the problems raised by competition between traditional and electronic commerce and (ii) the VAT issue, especially which rate should be used, that of the country of origin or the country of purchase.

Workshop VI: Prospects for opening up to the East

Mr Hamro-Drotz, Workshop VI Rapporteur, presented the following conclusions: The Workshop had identified several fundamental and positive elements:

- Successful enlargement would bring a stable and attractive larger market with approximately 100 million new consumers.

- As the driving force behind European Union the Single Market had to function well and not be watered down. Enlargement should not bring about a “semi”-single market. It was essential for all applicant countries to adopt the Single Market *acquis* before enlargement. The Single Market was the core of preparations for enlargement.
- Quality was more important than speed. The necessary time should be taken to prepare for enlargement. It was also the interest of applicant countries to have sufficient time to adapt fully to membership conditions. The reinforced pre-accession strategy was a central instrument in the preparatory period.
- The screening process had started and was important for an overview of problem areas. It was positive that the Commission wanted to involve not only Governments but also economic and social partners in the process. Good teamwork between all parties involved was important.

There were, however, certain challenges:

- Some players lacked information and both Governments and credible and independent economic and social partners had important roles to play.
- It was essential to identify the main problems within the large *acquis* comprising 1,300 Directives. The *acquis* would have to be adopted and adjustments made before accession. A well functioning labour market would have to be ensured. Institution building and dialogue between economic and social partners and Governments were essential.
- Priority should be laid on a sustainable environment for business, particularly as regards competition rules, public procurement, transparency in State aid and privatisation. Investment should be attracted by boosting banking and stock markets and securing industrial property and patents. Importance should be attached to certification and standardisation.

The EU should direct its financial and human support to the above-mentioned priority fields. The economic and social actors should be involved in a structured way. In this context the ESC had a central role to play.

Workshop VI - related comment at the Plenary Session

A Polish employers' representative raised the issue of boundaries of responsibility and liability for costs between the applicant countries and the European Union and between Governments and businesses. She underlined the importance of involving social partners more closely in the preparatory process and of preparing both business and citizens for EU membership. The information flow from Government to social partners was not sufficient and, consequently, it was very difficult for entrepreneurs to prepare themselves effectively for the new situation. To assist business, she raised the idea that credit could be made available and forms of tax relief granted over a certain period.

Summing-up by the Chairman of the Hearing

From the Rapporteurs' summaries of the three afternoon Workshops, Mr Vever summed up as follows:

- The most important issues were the arrival of the Euro, enlargement, globalisation and new technologies.
- **Progress** on the Single Market had hardly been mentioned during the Hearing. Questionnaire replies had indicated rather greater progress. Overall there was not much difference between the situations described before and after introduction of the Action Plan.
- **Backlog** was most visible and harmful in public procurement and taxation, a situation made even less acceptable by the imminent arrival of the Euro.
- The **priorities** mentioned were not traditional ones, i.e. participants were not bothered by Directives but laid stress on the quality of the way the Single Market was working. Several speakers had laid stress on means of identifying problem areas and of involving economic and social partners.
- In order to obtain a clearer picture of **enlargement** preparations, it might be useful to use something like the existing "Scoreboards" on the Single Market for the CEECs and to involve their economic and social partners more.

Mr Vever drew the following **general conclusions from the Hearing**:

- An efficient and operational Single Market as an ongoing reality was necessary.
- The Action Plan had brought momentum in Brussels but had not had enough impact on the ground.
- There was still much to do - it was not possible for all measures to be carried out by end 1998, when the Action Plan ran out. Trade barriers and issues were especially visible in the following areas:
 - tax disparities;
 - public procurement, where there was still some de facto closing-off of markets;
 - mutual recognition, which was not fully implemented;
 - technical barriers (especially those new ones arising at source, at national level);
 - obstacles in law to partnership and merger between companies (e.g. the European Company Statute);
 - simplification (leave the experimental phase behind and apply simplified directives, while extending the SLIM approach to national rules touching the Single Market);
 - monopolies which persisted;
 - patents;
 - free movement of persons;
 - access to information and especially the development of modern information

tools. The Commission's "Europa" site on the Internet – the second most visited sight in Europe – had shown itself very useful. It was worthwhile to set up with users an interactive "Single Market" data bank (like the "Market Access" set up by the Commission for data on access to export markets – viz. non-EU).

It was essential to avoid the end of the Action Plan and the resulting lack of new political pressure leading the EU institutions and member States to slacken their efforts for Single Market completion. It was necessary to support completion of the unfinished parts of the Action Plan, bearing in mind the introduction of the Euro, enlargement and globalisation. A distinction had to be made between completing the Single Market, i.e. putting the regulatory framework into place, and maintaining the Single Market which involved ongoing action. The Commission should continue Single Market construction until 2002, when national coinage and banknotes were due to disappear and enlargement took place.

Targets for improvement: simplification of rules, prevention of new obstacles, information access especially via Internet. Publishing Scoreboards every six months was good and worth continuing: judged very useful was the new part on economic integration, introduced in the latest version, including tables on trade, foreign investment, company mergers and price disparities. More and more attention should be paid to this economic aspect. It was essential to involve economic and social players more. One interesting idea could be to incorporate the views of economic and social partners into the Scoreboard.

It was appropriate that the SMO had been set up within the ESC; "observatory" would be the key term for the years ahead, as it was necessary to keep a close eye on how things actually turned out in practice. More than ever the ESC intended to act as a mediator between Single Market users and the EU institutions.

Mr Vever closed the Hearing by pointing out that the SMO had a page on the ESC's website and an e-mail address. Participants were invited to send in their comments. Mr Vever confirmed that the SMO would continue to organise Hearings in the future.

II. QUESTIONNAIRE

1. Have you been adequately informed as regards the progress made with the Single Market and the opportunities which it represents?

- yes
- no
- suggestions

2. Are you largely satisfied with the way in which the Single Market is operating?

- yes
- no
- reasons

3. Please pinpoint the main areas in which progress has been made

-
-
-

4. What are the main outstanding barriers?

-
-
-

5. Have you noticed the resurgence of former barriers or the creation of new barriers?

- yes
- no
- please identify the barriers

6. Has harmonization in the EU been sufficiently effective?

- yes
- no
- reasons

7. Is mutual recognition operating satisfactorily?

- yes
- no
- reasons

8. Do the rules need to be simplified?

- particularly at member state (or regional) level

- yes
- no
- reasons

- particularly at EU level

- yes
- no
- reasons

9. Will the introduction of the euro increase the demands placed on the Single Market?

- yes
- no
- reasons

10. Will EU enlargement involve changing the characteristics in respect of the Single Market?

- yes
- no
- reasons

11. What three key actions are in your view necessary for the completion of the Single Market?

-
-
-

12. Should a data bank relating to the Single Market, which would be directly accessible to economic operators, be set up on the Internet?
- yes
 - no
 - suggestions
13. What questions would you like to see placed on the agenda for the Hearing on 15 September?
- -
 -
14. Would you like to give your views on a particular subject in the course of the Hearing?
- yes
 - no
 - subject
15. Do you have any further points to make with regard to this questionnaire?

III. REPLIES TO THE QUESTIONNAIRE: ANALYSIS

Introduction

The Economic and Social Committee's Single Market Observatory held a general Hearing in Brussels on 15 September 1998 on "Which Single Market Beyond the Euro?"

In organizing this Hearing, the Committee wished to provide Single Market users with the opportunity to make their views known to the European institutions, freely expressing their standpoints, expectations and priorities at a key moment in the European venture, just a few months before the end of the Single Market action plan, and the launch of the single currency.

A questionnaire was sent out to 887 organizations representing Single Market users. Their replies have helped in the preparation of this Hearing and in developing an in-depth debate on the current situation and the future of the Single Market, focusing on priority topics such as:

- the effects of the introduction of the euro,
- simplification of European and national rules,
- adjustment of the labour market and training,
- information for socio-economic players and the general public, and
- future enlargements.

The questionnaire was structured around the following subjects:

- 1. Information on progress made with the Single Market and the opportunities it presents.**
- 2. Satisfaction with the way the Single Market is operating.**
- 3. Single Market progress.**
- 4. Barriers.**
- 5. Creation of new barriers**
- 6. Effectiveness of Community harmonization.**
- 7. Mutual recognition.**
- 8. Simplification of rules**
- 9. Introduction of the euro**
- 10. EU Enlargement.**
- 11. Key actions for completion of the Single Market.**
- 12. Single Market data bank on the Internet.**

In all 87 questionnaires were returned, including collective replies from professional bodies in France and Spain, thus broadening the number of organizations which took

part in the inquiry. The replies painted a very mixed picture of the socio-economic players' views of how the Single Market was operating:

On the one hand they confirmed that progress had been or was being made on freedom of movement and trade, technical harmonization, moves to open up public monopolies and the liberalization of financial services.

On the other hand, they lamented the continued existence of barriers, particularly tax disparities, price distortions, inadequate social harmonization, the compartmentalization of public procurement, shortcomings in mutual recognition, delays in the protection of intellectual property, specific environmental concerns, transnational fraud and the resurgence of new national barriers.

Two major concerns were:

- the limits to the effectiveness of Community harmonization;
- the lack of steps to simplify Single Market rules.

While welcoming the imminent introduction of the euro, which represented a key step in the right direction, the bodies replying to the questionnaire were convinced that monetary union would not in itself be enough to complete the Single Market but would further highlight how necessary it was, by exposing shortcomings and distortions in competition.

Future enlargement of the Union also raised a number of issues relating to harmonization, the need to even out differences in development levels and in wages, social and immigration policies.

The respondents wished for better information about all the current opportunities in the Single Market. They called for an inter-active data bank on the Single Market to be set up as soon as possible, providing the necessary transparency.

1. Have you been adequately informed as regards the progress made with the Single Market and the opportunities which it represents?

YES	NO	NO OPINION
62%	15%	23%

A large majority of the organizations questioned said they were well informed about the progress made with the Single Market, and opportunities it presented, while pointing out that there was a need for more complete and updated information.

Some employers' federations did however feel that they received better information

through their professional bodies than through specialist networks and public authorities.

In general, the trade unions put forward suggestions for providing easier access to information, stressing in particular the inequalities between the socio-economic players.

Consumers organizations called for more focused and better presented information.

Other suggestions concerned publicizing recent developments in the Single Market and the role to be played by education, the Internet, the press and non-government organizations (NGOs).

Lastly, legal information was often inadequate on matters such as the movement of workers and national approval and certification procedures.

2. Are you largely satisfied with the way in which the Single Market is operating?

YES	NO	NO OPINION
38%	38%	24%

More than a third of the organizations questioned were broadly satisfied with the way the Single Market was operating because it meant an increase in profits, particularly for large firms; consumers were also obtaining increasing benefit from the Single Market.

Roughly the same number of organizations put more stress on the shortcomings of the Single Market, particularly because members of the general public were not gaining enough benefit from it.

In addition, Community harmonization was not yet complete and obstacles to trade and legislative barriers persisted.

In particular, the trade unions and NGOs questioned were not happy with the way the Single Market was operating because it had only limited impact on workers and did not take enough account of non-profit making bodies or certain basic rights.

Lastly, some employers' organizations noted that the Single Market was not yet complete in some sectors.

3. In which main areas has progress been made?

The imminent introduction of the single currency was considered to be the main area of progress in the Single Market.

Many respondents also emphasized simplification of rules (for example the SLIM programme), the establishment of horizontal rules and above all Community harmonization (company law, taxation, accounting and technical standards), in addition to the establishment of timetables and deadlines for transposing directives into national law.

A large number of respondents welcomed the achievement of the four freedoms: freedom of movement of goods, people, services and capital. It was also noted that progress had been achieved in telecommunications and transport and in the financial, informatics and electronics fields.

RESPONDENTS	AREAS WHERE PROGRESS HAS BEEN NOTED
INDUSTRY/EMPLOYERS	Free movement of goods, people, services and capital Liberalization of the electricity, gas and telecoms markets Cross-border business and institutional cooperation Directive on late payments (pending)
TRADE UNIONS	Abolition of border controls Broader supply of goods and services
CONSUMERS	Abolition of border controls Schengen agreements Consumer protection and public health Moves to improve communication and to take on board social partners' views and to boost transparency
VARIOUS ACTIVITIES (CRAFTS, SERVICES, ETC.)	Mutual recognition of, inter alia, diplomas Freedom of establishment Cross-border business and institutional cooperation Coordinated reduction in interest rates
ACCESSION CANDIDATES	Upward alignment of regional development levels Regional cooperation Privatization and protection of private property

Other specific examples of progress achieved include:

- The Commission's competition policy
- The 1995 enlargement of the EU to include Austria, Finland and Sweden
- Better representation of SMEs
- The establishment of national contact points
- Euro-Info-Centres

- Closer links between the various European institutions
- The INTRASTAT system
- Greater European awareness
- Agenda 2000
- Ecological labels
- A rapid intervention system to deal with certain barriers to the free movement of goods
- Standardization

4. What are the main outstanding barriers?

The respondents described the main barriers as being administrative, social and technical.

PUBLIC AND ADMINISTRATIVE BARRIERS	PRIVATE AND SOCIAL BARRIERS	TECHNICAL BARRIERS
Disparities between legislation on the infringement of economic rules.	Consumer and behavioural habits	Packaging measures
Tax disparities National rules on direct taxation	Language barriers	Labels
Social security systems Public procurement Monopoly protection	Regional disparities Protectionist reactions Differences in development levels	Technical standards Codification problems
Bureaucracy Varying interpretation of directives Non-compliance with directives Procedures for declaring residence by EU citizens staying in another EU Member State Identity checks at borders		
Differences in environmental policies State aid		

Some replies varied according to the different socio-economic group concerned, as illustrated by the following table:

RESPONDENTS	BARRIERS NOTED
INDUSTRY/ EMPLOYERS	Lack of information for SMEs Practices restricting trade Tax discrimination, particularly in the matter of excise duties Eco-labels Technical standards
TRADE UNIONS	Lack of transparency Lack of recognition of professional diplomas
CONSUMERS	Lack of information for consumers
VARIOUS ACTIVITIES	National rules on direct taxation Difficulties in gaining access to justice Distribution and operating monopolies

Examples of the remaining barriers are:

- Discrimination between products
- The ineffectiveness of Protocol 3 of the European Economic Area
- Consolidation of European legislation
- The lack of a statute for the European company

5. Have you noticed the resurgence of former barriers or the creation of new barriers?

YES	NO	NO OPINION
40%	34%	26%

Replies varied, but the bodies questioned did note the reappearance of some old barriers and the creation of new barriers.

One of the major new barriers described was an excess of Community regulation, as well as new national legislation on the environment and consumer affairs, and the rules on working time, wages, state aid and public health.

Protectionist national policies, currency fluctuations, different schemes for different sizes of business, positive discrimination and not enough access to new information

technologies for SMEs were also quoted as new barriers, as was discrimination based on nationality.

Some organizations also noted that there was more insecurity and fraud and a deterioration in tax, social, technological and cultural differentials.

6. Has harmonization in the EU been sufficiently effective?

YES	NO	NO OPINION
25%	43%	32%

Most respondents deemed Community harmonization, even on a partial basis, not to be effective enough.

The main reasons given for this were the slow, ponderous nature of bureaucracy and even the cost of taking legal action.

An over extensive application of the subsidiarity principle and the country-of-destination principle were also queried, as were the lack of rules for transposing European directives into national law.

Moreover, there was not enough mutual trust, since national objectives were often very different.

Difficulties also existed in relation to approval and certification.

7. Is mutual recognition operating satisfactorily?

YES	NO	NO OPINION
37%	41%	22%

Views were fairly divided as to the success of mutual recognition, but a greater number of organizations felt that mutual recognition did not operate satisfactorily, particularly due to national "responses": bureaucracy, complexity, set ways and also because there was not enough mutual trust. Moreover, some organizations felt that the Commission did not have sufficient authority to change national laws.

It was above all in the following areas that mutual recognition did not operate satisfactorily: marks, vocational training, social protection, technical standards and public procurement.

8. Do the rules need to be simplified?

AT MEMBER STATE LEVEL	YES	NO	NO OPINION
	52%	25%	23%
AT COMMUNITY LEVEL	YES	NO	NO OPINION
	37%	29%	34%

The replies to the questionnaire indicated that a simplification of the rules was needed, particularly at Member-State level.

In fact, there was an excessive number of national rules which were different (particularly on taxation), complex (because of the directives), and sometimes contradictory (where there were already provisions at Community level).

Moreover, the simplification process did not seem to be developing in a transparent manner.

To a lesser degree, organizations felt that simplification was also necessary at European level because there were simply too many over-complex rules, particularly technical rules. Such simplification was important so as to facilitate Community monitoring and harmonization measures and also to ensure that texts were more readable and understandable. Moreover, the subsidiarity principle was not yet adequately taken into account.

Lastly, full benefit should be drawn from the opportunities offered by the SLIM and BEST programmes and they should be put into practice as quickly as possible.

9. Will the introduction of the euro increase the demand placed on the Single Market?

YES	NO	NO OPINION
69%	3%	28%

A large majority of the organizations questioned were certain that the introduction of the euro would increase the demands placed on the Single Market, because it would make for greater transparency, better price comparability and mean that existing distortions were more visible (such as tax and social differences); this would increase pressure to reduce these differences.

Moreover, the euro would secure monetary stability, speed up the integration process of the Single Market, step up competition and facilitate cross-border transactions.

The single currency will also add new impetus to transactions within the Community and therefore set a challenge for both public authorities and businesses.

Lastly, it would encourage mobility amongst the European population within the euro zone.

10. Will EU enlargement involve changing the characteristics in respect of the Single Market?

YES	NO	NO OPINION
58%	11%	31%

The majority of the respondents felt that enlargement of the Union would change the circumstances surrounding the Single Market.

It would in fact force the pace of completing the Single Market, create new opportunities and secure greater transparency, as long as the "acquis communautaire" was rapidly incorporated into new Member States' legislation.

However, new problems were also raised by the respondents:

- immigration problems;
- the risk of social dumping;
- problems relating to agriculture, the environment and the construction sector;
- increasing social disparities, particularly between the north and south of Europe;
- institutional and legislative problems;
- dilution of Community rules, difficulties in completing harmonization;
- tension between social objectives and the interests of countries outside the euro area;
- problems in aligning the various currencies on the euro;
- more difficulties for liberalization efforts;
- major cost for the European Union.

However, these problems should act as a positive trigger for harmonization, simplification and institutional reform, which were deemed vital to deal with the above-mentioned issues.

11. What key actions are in your view necessary for the completion of the Single Market?

The following key actions were proposed, in order of importance:

- Tax harmonization or alignment of tax policies (VAT and corporation tax) and elimination of double taxation;

- Mutual recognition, particularly of diplomas;
- Full introduction of the euro, stability of the pound sterling vis-à-vis the euro, stability of the euro;
- European cooperation (between businesses, between administrations and in the fight against crime).

A series of harmonization and simplification measures were also called for:

- Harmonization of technical and environmental standards;
- Harmonization of administrative formalities;
- Harmonized European protection of industrial and intellectual property rights;
- Harmonization of vehicle registration procedures;
- Simplification of procedures;
- Abolition or simplification of vertical rules;
- Simplification of border formalities and simplification of rules;
- Harmonization of national legislation in a number of areas related to the Single Market (e.g. advertising);
- Social harmonization: labour law, social security systems, pension schemes, civil status;
- Standardization.

More generally, some organizations called for educational reform, foreign language learning, completion of the "social Europe" and, above all, greater access to information. Reform of the Common Agricultural Policy was also called for by consumers' organizations.

In addition, a number of measures were suggested:

- Greater discipline in matters relating to state aid, steps to end monopolies and genuine efforts to open up public procurement (this point was made by several respondents);
- Local authorities should be made more aware of the European market;
- Systematic action by the Court of Justice to deal with any delay in the application of directives, speedy response to the infringement of existing rules, effective methods for resolving cross-border litigation (point raised by consumers);
- Social protection should be secured as a fundamental social right, consumer protection;
- Steps to decompartmentalize national air traffic control;
- European company statute;
- Liberalization of services;
- Stricter import controls;
- Ending discrimination against Mediterranean farm products;
- Reform of the excise duties arrangements for alcohol;
- Tax exemption for savings and profits invested or reinvested in businesses;
- Principle of taxation at source for turnover tax;
- European legislation on transfer prices;
- Development of "benchmarking" and "best practice" arrangements;
- Freedom of establishment;

- Combating crime;
- Strengthening the common foreign and security policy;
- Establishing a common policy on immigration and the right to asylum;
- Directive on expatriate workers;
- Reform of the European Institutions, simplification of decision-making mechanisms;
- Moves to bring EU citizens closer together, political commitment;
- Consideration of regional and national features;
- No hasty decisions in accession negotiations.

Some organizations felt that the above would justify implementation of the Single Market action plan, the new post-1999 action plan.

12. Should a databank relating to the Single Market which would be directly accessible to economic operators be set up on the Internet?

The majority of organizations were favourable to the establishment of a Single Market databank directly accessible to economic operators; one organization suggested the creation of a statistical databank and another proposed a databank covering Member States' legislation.

In any such move, the various languages involved would also have to be taken into account.

QUESTIONNAIRE COMPLETED BY:

1. ASSOCIATION INTERNATIONALE DES SAVONS ET DETERGENTS
2. CAOBISCO - ASSOCIATION D'INDUSTRIES DE PRODUITS SUCRES
3. IFIEC EUROPE - INTERNATIONAL FEDERATION OF INDUSTRY ENERGY CONSUMERS
4. FEDERATION OF NORWEGIAN COMMERCIAL AND SERVICE ENTERPRISES
5. ANEIOA (Fruit and vegetables in Italy)
6. MAISON DES PROFESSIONS
7. VORORT - REPRÉSENTATION DE L'UNION SUISSE DU COMMERCE ET DE L'INDUSTRIE
8. ÖGB - Österreichischer Gewerkschaftsbund
9. FEDERATIONS DES BOURSES EUROPEENNES
10. DGB - DEUTCHER GEWERKSCHAFTSBUND
11. KULUTTAJAT-KONSUMENTERNA (Consumers in Finland)
12. ARBEITSGEMEINSCHAFT DER VERBRAUCHERVERBÄNDE e.V (AgV)
13. CISL - CONFEDERAZIONE ITALIANA SINDICALI LAVORATORI
14. HANDWERKSKAMMER AACHEN
15. COMITE SYNDICAL EUROPEEN DE L'EDUCATION
16. INDUSTRIE - UND HANDELSKAMMER ZU LÜBECK
17. ICTU - IRISH CONGRESS OF TRADE UNIONS

18. AIDDA - ASSOCIAZIONE IMPRENDITRICCI E DONNE DIRIGENTI D'AZIENDA
19. CHAMBRE DES METIERS DU GRAND-DUCHE DE LUXEMBOURG
20. ASSOCIATION DE LA TRANSFORMATION LAITIERE FRANCAISE
21. EFTA SURVEILLANCE AUTHORITY
22. BREWERS AND LICENSED RETAILERS ASSOCIATION
23. DANISH BREWERS' ASSOCIATION
24. HANDWERKSKAMMER DES SAARLANDES
25. EUROPEAN ORGANISATION FOR TESTING AND CERTIFICATION
26. FINNISH FOOD MARKETING ASSOCIATION
27. UFC- QUE CHOISIR?
28. STIFTUNG WARENTEST
29. IFD - INTERNATIONALE FÖDERATION DES DACHDECKERHANDWERKS
30. UNION FEMININE CIVIQUE ET SOCIALE
31. CECU- CONFEDERACION DE CONSUMIDORES Y USUARIOS (Spain)
32. BRASSEURS DE FRANCE
33. CGTP-IN - CONFEDERAÇÃO GERAL DE TRABALHADORES DE PORTUGAL
34. CONSUMENTENBOND (Netherlands)
35. INSTITUT EUROPEEN DES ARMES DE CHASSE ET DE SPORT
36. SIPTU- SERVICES INDUSTRIAL, PROFESSIONAL AND TECHNICAL UNION (Ireland)
37. CENELEC
38. UEAPME
39. GENERAL CONSUMER COUNCIL (for Northern Ireland)
40. FEDESA - FÉDÉRATION EUROPÉENNE DE LA SANTÉ ANIMALE
41. COFACE - CONFÉDÉRATION DES ORGANISATIONS FAMILIALES DE LA CE
42. CEDAG - COMITÉ EUROPÉEN DES ASSOCIATIONS D'INTÉRÊT GÉNÉRAL
43. PUBLIC POWER CORPORATION OF GREECE
44. EFRP- EUROPEAN FEDERATION FOR RETIREMENT PROVISION
45. DUTCH ASSOCIATION OF INSURERS
46. ICOMIA
47. GROUPE BANQUES POPULAIRES
48. EUROCADRES
49. INFORMATION CENTER JACQUES DELORS
50. HUNGARIAN INDUSTRIAL ASSOCIATION
51. SCOTCH WHISKY ASSOCIATION
52. CITPA - INTERNATIONAL CONFEDERATION OF PAPER AND BOARD CONVERTERS IN THE EUROPEAN COMMUNITY
53. EURO INFO CENTRE NORD PAS DE CALAIS
54. CONFEDERATION OF LITHUANIAN INDUSTRIALISTS
55. MINISTERIO DE ECONOMIA Y HACIENDA
56. FIEC- FEDERATION DE L'INDUSTRIE EUROPEENNE DE LA CONSTRUCTION
57. HANDWERKSKAMMER TRIER
58. AGV - ARBEITSGEMEINSCHAFT DER VERBRAUCHERVERBÄNDE
59. ACEA- ASSOCIATION DES CONSTRUCTEURS EUROPÉENS D'AUTOMOBILE
60. ASSUC - ASSOCIATION DES ORGANISATIONS PROFESSIONNELLES DU COMMERCE DES SUCRES POUR LES PAYS DE L'U.E.
61. VERENIGING VOOR BEDRIJFSPENSIOENFONDSEN
62. EUSA- EUROPEAN UNION OF SOCIAL PHARMACIES
63. SCOTTISH COUNCIL DEVELOPMENT AND INDUSTRY

64. CHAMBRE DE COMMERCE DU GRAND-DUCHÉ DE LUXEMBOURG
65. IHK FLENSBURG - INDUSTRIE UND HANDELSKAMMER
66. MINISTERE DES AFFAIRES ETRANGERES DU GRAND-DUCHE DU LUXEMBOURG
67. MINISTERIO DE SANIDAD Y CONSUMO DE ESPAÑA
68. SCOTLAND EUROPA
69. FEDERATION OF POLISH EMPLOYERS
70. AK JUSTITIARIAT (ARBEITSKAMMER)
71. OBRTNA ZBORNICA SLOVENIJE
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81. MINISTRY OF ECONOMIC AFFAIRS OF THE NETHERLANDS
82. COPA/COGECA
83. BULGARIAN INDUSTRIAL ASSOCIATION
84. BDI- BUNDESVERBAND DER DEUTSCHEN INDUSTRIE
85. CONFEDERATION OF FINNISH INDUSTRY AND EMPLOYERS
86. CNPF-CONSEIL NATIONAL DU PATRONAT FRANÇAIS
(synthesis of replies from 30 member organisations)
87. CEOE INTERNAC. - CONFEDERACIÓN ESPAÑOLA DE ORGANIZACIONES
EMPRESARIALES (synthesis of replies from member organisations)



IV. CONCLUSIONS OF THE HEARING

The Hearing, attended by 150 representatives of the social and economic interest groups, had a two-fold aim:

- to take stock of the situation three months before the Action Plan on the Single Market draws to a close, coinciding with the introduction of the Euro;
- to draw up a list of priorities for the future of the Single Market.

The Hearing was chaired by Mr Bruno Vever, President of the ESC Single Market Observatory Standing Study Group, and was also attended by Mr John Mogg, Director-General of Commission DG XV. Six workshops dealt with various aspects of the Single Market: the efficiency and simplification of the rules, the economic and fiscal challenges, adjustment of the labour market, transnational corporate strategies, the challenges of the information society and the prospects for opening up the EU to the East.

The President drew the following conclusions:

- More than ever before, the European social and economic players need a successful and efficient Single Market. The completion of the Single Market, far from being an outdated concept, is still a key challenge if we are to guarantee competitiveness, employment and cohesion within the EU on the eve of the launch of the euro and with the prospect of further major enlargement.
- Following the launch of the Action Plan in June 1997, the Community institutions endeavoured to revitalize the Community harmonization process and speed up national procedures for transposing EU legislation into national law. The Commission's Scoreboard shows that although encouraging progress has been made, far too many measures will clearly still be incomplete when the Action Plan draws to a close in December 1998.
- As shown by a survey conducted by the Committee in advance of the Hearing, the social and economic players still paint a very contrasting picture of the operation of the Single Market:
 - on the one hand, they confirm that progress has been, and is being made on freedom of movement and trade, further technical harmonization, the break-up of public monopolies and the liberalization of financial services;
 - on the other, they deplore the persistence of shortcomings and obstacles in key areas, such as: disparities in taxation levels, the lack of incentives for businesses to merge or work more closely with one another, price distortions, inadequate

social harmonization, the compartmentalization of public procurement markets, lack of mutual recognition, delays in protecting intellectual property, environmental issues, transnational fraud problems, the emergence of new national barriers.

– Two major concerns are:

- the limited effectiveness of Community harmonization, due to the fact that the authorities, hiding behind their own national interests, tend to behave in an excessively conservative and restrictive manner;
- the limited progress in simplifying Single Market rules, and thus in free movement of goods and services. Urgent action is needed to implement the different Community simplification schemes and to persuade the Member States to undertake similar simplification at national level.

– The social and economic interest groups welcome the imminent advent of the euro, considering it to be a crucial step forward, but are convinced that monetary union alone will not be enough to complete the Single Market. Instead it will highlight the need to complete the Market, by exposing delays and shortcomings. They believe that Community institutions and Member States must not be allowed to slacken their efforts, in the absence of renewed political pressure, once the Action Plan terminates in December 1998.

– The participants in the Hearing therefore urge the Community institutions:

- to set an irrevocable deadline within which to remedy the principal shortcomings which prevent the Single Market from being fully operational. The deadline should be before the end of 2002, when national currencies will finally be abandoned and further enlargement will increasingly become a reality;
- step up the pressure, independently of all deadlines and with the direct involvement of social and economic players, to ensure that the Single Market continues to work properly. A key element of such pressure should be the periodic updating of the Commission's Scoreboard on the Single Market. In addition to legal aspects, this should include economic indicators and the views of those operating in the field.

– The social and economic interest groups also ask for better information on all current opportunities offered by the Single Market and on the remaining obstacles, as well as on the idiosyncrasies of individual Member States. They would like an interactive database on the Single Market to be rapidly incorporated into the Europa Internet site. This should be as transparent as possible, following the example of the "Market Access" database, which was introduced by the Commission to help companies access the markets of non-member states.

- From 1999 the ESC's Single Market Observatory will closely monitor the impact of the euro on the Single Market. It therefore invites all social and economic players to submit their observations, inter alia via its permanent website:
www.esc.eu.int (e-mail: smo@ces.be).

www.esc.eu.int.

e-mail: smo@ces.be

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