European Association of Development Agencies
Association Européenne des Agences de Développement

EURADA NEWS

EURADA-NEWS
Périodique Mensuel
Bureau de Dépôt
B – 1040 Bruxelles 4
Numéro d'agrément: P904017
Période couverte: Juillet 2009
Editeur Responsable : Christian SAUBLENS

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# EDITORIAL

It is no secret that the EU Commission will announce its budgetary objectives toward the end of 2010 and consequently the financial resources to be made available under Community policies for the period beyond 2013.

Below are a few possible scenarios for this activity of pivotal importance in terms of the future of the regional policy.

1° *Status quo*, i.e. the Common Agricultural Policy and internal policies (RTD, CIP, TENs, etc.) continue to be sourced at roughly the same level.

In this case, policy reform and choices are made within an EU that will need to share resources between the supporters of stronger and more visible sectoral policies and the proponents of a strong cohesion policy. Some Commissioners may indeed tire of having to explain again and again that the EU policy they manage exists only through the ERDF and has no visibility whatsoever because, outside the funding earmarked under the ERDF, the EU Commission can supply no exhaustive or precise list of projects carried out at local level. Therefore, there is a risk that ERDF resources may be spread over four Funds, each addressing a major challenge: RTD, climate change, migration, globalisation.

Such a scenario would also inevitably ask the question of the usefulness of retaining an Objective 2 – presently called "Competitiveness Objective" – if a financial transfer takes place between the Cohesion Fund and sectoral policies. This option would self-evidently soon raise the issue of the integrated approach.

Under this scenario, there would still be a need to define the relative weight of intervention in support of experimentation (a return to Community initiatives recommended in the Barca Report), support for cities and consideration of the notion of territorial cohesion as contemplated in the Lisbon Treaty – provided of course, that these issues are still on the agenda by then.

2° Reconsideration of the role of the EU Cohesion Policy. For several years, academic and other experts have doubted the added value of the Cohesion policy as currently applied and agree with the Ministers of Finance of some Member States who advocate a resource redistribution policy based on a weighting of individual Member States' contributions to the EU budget.

Others, who are a priori in favour of an EU-wide development policy, believe that a system based on financial streams flowing to the EU in the form of individual contributions of EU Member States followed by a negotiation of the return "home" of this financial contribution through operational programmes and a set of conditions specified in a regulation is too cumbersome, both administratively and financially. So they too, are in favour of a budget weighting approach allowing them to decide by themselves how to help their territory.

Worth noting is that even the World Bank has concluded that policies that do integrate a regional dimension are not comparatively more effective in economic development terms.

3° A reduced EU budget. The current economic and financial crisis will bear a double impact on the EU budget debate, i.e.:

a) the need to reduce the public deficit. It will be very tempting for Member States to pass some of this burden to the EU rather than to force it upon themselves.

b) an opportunity to demonstrate that the EU budget is already too high since Member States – as the main beneficiaries of the Cohesion Policy – cannot absorb the present budget because they are unable to find adequate match funding (for memory, the ESF is offering to provide 100% of the funding for some actions in 2009 and 2010).

One of the consequences of this scenario may be a reconsideration of the Cohesion Policy's total allocation in future and consequently of the objectives it may seek to deliver.

Despite this daunting backcloth, two elements may plead in favour of a quasi *status quo* compared to the present system:

a) it is in the interest of all Member States to obtain a return on their contribution to the EU budget that is both clearly identifiable and measurable in accounting terms, which would not be the case within the framework of strengthened sectoral policies.

b) the fear of administrative and legal constraints imposed on the Member States who use Community funding by Member States who are net contributors to the EU budget. It is safe to assume that some Member States will be delighted with the rebate the EU will grant them from savings arising from unused Community funding. If all Member States are elegible, we can foresee that the regulatory constraints will be less than if only a few of them are eligible. Indeed, nobody wants to shoot in his foot!

The above should encourage EURADA members to discuss with their national authorities to ensure that Ministers of Finance have a crystal clear view of the added value represented by the ERDF for the European Unions' regions.

On this note, have a good holiday!

# IMPORTANT DATES

| | |
|---|---|
| 9/11.9.09 | CEEC Congress in Ruse (BG) in cooperation with the Business Support Centre for SMEs |
| 17/18.9.09 | CNER Congress in Bourges (F) – "Reinventing local economic development" |
| **24/25.9.09** | Board of Directors |
| 4/7.10.09 | IEDC Annual Conference (Reno, Nevada) www.iedconline.org |
| 28.10.09 | Working Group on Territorial Marketing |
| 23.11.09 | EURADA General Assembly (Madeira) |
| 23/25.11.08 | 3rd World Forum on Regional Economic Development (Madeira) |
| 3/4.12.09 | InterCluster 2009 |

# LIFE OF THE NETWORK

## ROUND TABLE OF PRACTITIONERS IN ECONOMIC DEVELOPMENT

Snapshot of the work of 18/19 June 2009

Theme : Contribution of regional structures to solving the crisis

Participants: 14 Eurada members, 8 of them from the representation offices in Brussels
4 non members
6 representatives of the European Union
1 representative of OECD
2 representatives of the Committee of the Regions
1 representative of the Economic and Social Committee
3 representatives of EIB / EIF

Highlights :

→ Review of the document worked out by the Secretariat

→ Extended deadline given to members (up to 15.8.09) to enrich the document with examples of actions conducted

→ CANCELLATION of the discussion with the 16 representatives of the European Union by lack of sufficient representativity of the Eurada members. Indeed, only four experts could stay in Brussels for the meeting. We will quote one of them: *"Shame that no more members decided to attend".* This question will be discussed in the next Board meeting.

## RELATIONS WITH OECD

After Mrs Debra Mountford in **Agorada**, Mr Andrew Davies participated in the Round Table of Practitioners in Economic Development.

Furthermore, OECD invites interested members to take part inits new (2009-2010) programme eneitled "Climate Change, Employment and Local Development". The contribution can take several forms :

- Sporadic reaction to the documents to be worked out,
- Participation in the work as experts,
- Organisation, on a local basis, of a study visit.

For further information please contact the Secretarariat.

## INTERNATIONALISATION OF INNOVATION SUPPORT ACTIONS

The Secretariat has informally forwarded the document below to various services of the Commission in response to the question of what could the European Commission do to promote open innovation at regional level. The question followed the remark that the concept of open innovation does not stop at the admnistrative frontiers of a territory.

This document should now be complemented by arguments on the costs which should be supported by the European Union in order to promote a real internationalisation of the tools mentioned.

# TRIIT

### TRANSREGIONAL IMPLEMENTATION OF INNOVATIVE TOOLS

Having witnessed over the years EU cofinancing of different programmes in support of either exchanges of experience between regions (Interreg I through IV, IRE, RoK II) or the formulation of joint regional strategies (RoK II, RIS-RITTS, etc.), we now need to advocate delivery of joint regional actions. Indeed, the EU Commission should in future gear its support toward Transregional Implementation of Innovative Tools (TRIIT).

Subject to a more detailed analysis, eligible tools under this kind of funding would include:

a) Transnational vouchers and "Meet the knowledge holders and producers"-type measures;
b) Creation of business hotel networks (soft landing packages) enabling innovative SMEs to conduct proof of (technology and market) concept activities in an international context;
c) Outplacement of foreign talent in SMEs. The system would rest on both tech and business colleges;
d) Transnational investment forums based on support (e.g. investment readiness) measures and the establishment of joint co-investment funds;
e) Interclustering activities geared toward transregional multi-sector platforms featuring support for the physical mobility of the ambassadors of partner regional clusters;
f) Support for the development of joint ventures or franchising contracts;

g) Joint management of patent portfolios through licensing of businesses in partner regions.

Eligible costs would mainly include:

- scheme internationalisation;
- matching expenses;
- outplacement costs – including for cluster ambassadors;
- co-financing of co-investment funds;
- premiums for joint venture development and the negotiation of licensing contracts;
- management costs;
- premiums for reception and accommodation of foreign companies in business hotels.

## PREPARING THE 9TH CEEC CONGRESS

The 9th CEEC Congress will take place in Ruse (Bulgaria) on 9 and 10 (am) September 2009. Il will be followed by the 1st Balkan Forum on Regional Development on 10 (pm) and 11 september 2009.

See enclosed the draft programme and the registration form which contain information on the hotels.

Attention: Working languages = English and Bulgarian

Online registration : http://www.bsc.ruse.bg/index.php?menuoption=rege

# REGIONAL POLICY

## SIX PROGRESS REPORT ON ECONOMIC AND SOCIAL COHESION

Entitled "Creative and Innovative Regions", this short report (15 pages) mainly focuses on the following subjects:

- → The regional dimension of creativity and innovation
- → Territorial cohesion: the state of the debate.

According to us, the key message of the part of the report devoted to creativity and innovation is as follows: *"(…) because innovation is becoming more complex (with more open innovation models, process innovation and role of absorption and adaptation) no single policy can promote innovation in all regions. Local knowledge needs to be mobilised for regions to design their own innovation systems and use knowledge and technology more effectively".*

We will note the following paragraphs from the "Territorial Cohesion" part :
*All(…) agreed that better tools for territorial analysis and indicators to understand territorial trends are needed. Improved analysis at NUTS3 level, development of thematic analyses on migration or climate change, improvement of territorial impact assessment instruments, can all improve policy design. The ESPON programme and the Urban Audit are regarded as key assets in this respect.*
*The Commission is urged to complement for analytical purposes GDP per head with other indicators of quality of life (e.g. human development, sustainability, vulnerability, accessibility of services).*

The report contains a statistical annex called "Commission staff working document".

There is no track on the future of the cohesion policy mentioned in the report.

The two documents are available on Eurada's web site, Heading "Regional Development".

# EMPLOYMENT AND STRUCTURAL FUNDS

## A SHARED COMMITMENT FOR EMPLOYMENT

Early June 2009, the European Commission has adopted a communication entitled "A Shared Commitment for Employment" (cf. Eurada's web site, Heading "Employment").

The document contains 3 highlights :

1. Gathering all actors around the objective of maintaining employment, creating jobs and helping persons having difficulties, namely through learning.
2. 100% funding of the Social Fund's actions in 2009.
3. Developing a microfinance instrument in order to facilitate the access to entrepreneurship.

The full text of the European Commission referring to these actions is reproduced below.

### ACCELERATING FUNDING TO TACKLE THE CRISIS

**Two accelerated funding possibilities** will significantly help Member States' recovery measures:

- To support the implementation of the rapid recovery packages, as well as Cohesion Policy investment more generally, the Commission will propose shortly an amendment to the Structural Funds Regulation, to give Member States the option to **not provide national co-funding during 2009 and 2010.** Without changing the distribution of funds between Member States or the annual ceiling of the EU financial framework for payment appropriations, this option of frontloading expenditure through an EU reimbursement rate of 100% during the expected peak of the crisis should accelerate project implementation, while reducing financial constraints particularly in Member States where ESF cofunding represents a significant amount of overall employment expenditure. The Commission, in partnership with the Member States, will closely monitor the impact of the rapid reaction packages through the current ESF annual and strategic reporting systems.
- To offer a new chance to the unemployed and open the road to entrepreneurship for some of Europe's most disadvantaged groups, including the young, the Commission will shortly propose a new **EU microfinance facility for employment**, to develop micro-enterprises and the social economy. By reallocating EUR 100 million from the existing budget which could leverage more than **EUR 500 million,** in a joint initiative with international financial institutions particularly the EIB Group, this new facility will extend the range of targeted financial support to new entrepreneurs in the current context of a reduced credit supply. Founders of microenterprises will also be supported by mentoring, training, coaching and capacity building, in addition to interest-rate support by the ESF.

# STATISTICS

## REGIONS' R&D EXPENDITURE

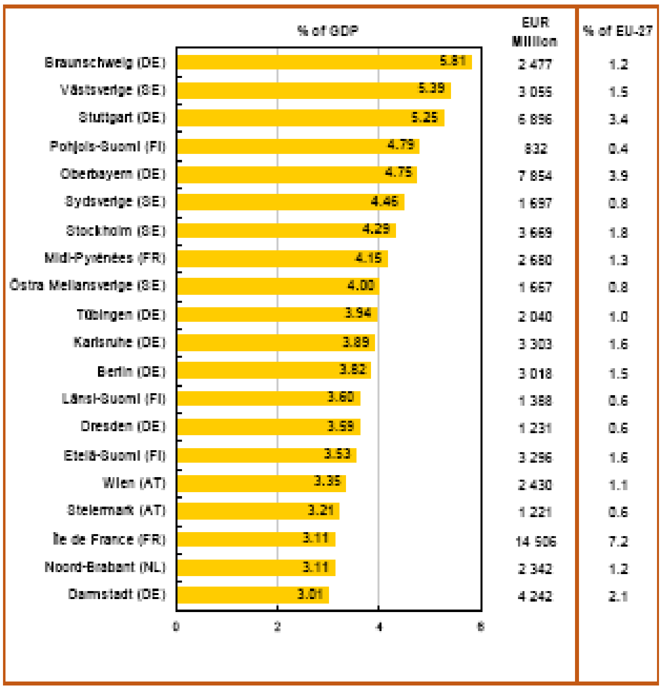
Eurostat has just published a report on the RTD expenditure of the 20 European regions leading this sector. The highlights of this report are as follows :

*In 2005, the top 20 EU regions in terms of R&D intensity were all above the 3 % target set by the Lisbon strategy.*

*A first group of three regions registered more than 5 % of GDP devoted to R&D activities. With an R&D intensity of 5.81 %, Braunschweig (DE) led the way in terms of R&D expenditure as a share of GDP, followed by Västsverige (SE) with 5.39 % and Stuttgart (DE) with 5.25 %. A second group of six regions registered R&D intensities between 4 % and 5 %, including Pohjois-Suomi (FI, 4.79 %), Oberbayern (DE, 4.75 %), Sydsverige (SE, 4.46 %), Stockholm (SE, 4.29 %), Midi-Pyrénées (FR, 4.15 %) and Östra Mellansverige (SE, 4.0 %).The remaining 11 regions registered R&D intensities between 3 % and 4 %.*

*In absolute terms, R&D expenditure was the highest in Île-de-France, with more than EUR 14 million, accounting for 7.2 % of total R&D expenditure in the EU-27. The French capital region was followed by two German regions, Oberbayern (EUR 7.8 million) and Stuttgart (EUR 6.9 million), accounting for 3.9 % and 3.4 % respectively of total R&D expenditure in the EU-27.*

The Top 20 EU regions is as follows :




Exceptions to the reference year:
2004: % of GDP regions from AT and FR
2006: EUR Million regions from AT and FI
Noord-Brabant (NL): National estimation and provisional data

Source: Eurostat R&D Statistics

# ECONOMIC INTELLIGENCE

## DEVELOPMENTS IN THE MEMBER STATES' ATTRACTIVENESS FOR FDI

| ATTRACTIVENESS OF EUROPEAN COUNTRIES FOR FOREIGN INVESTMENT | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **Evolution of the number of FDI transactions in Europe** | | | | | | | | | |
| | | **2008** | **2007** | **2006** | **2005** | **2004** | **2003** | **2002** | **2001** |
| 1. | UK | 686 | 713 | 686 | 559 | 563 | 453 | 369 | 388 |
| 2. | F | 523 | 541 | 565 | 538 | 490 | 313 | 253 | 267 |
| 3. | D | 390 | 305 | 286 | 181 | 164 | 111 | 154 | 172 |
| 4. | E | 211 | 256 | 212 | 147 | 121 | 119 | 122 | 143 |
| 5. | B | 142 | 175 | 185 | 180 | 107 | 77 | 73 | 91 |
| 6. | RO | 145 | 150 | 140 | 85 | 91 | nd | 33 | 40 |
| 7. | PL | 176 | 146 | 152 | 180 | 148 | 46 | 60 | 49 |
| 8. | RU | 143 | 139 | 87 | 111 | 116 | 109 | 86 | 76 |
| 9. | H | 100 | 135 | 108 | 115 | 139 | 84 | 100 | 85 |
| 10. | CH | 125 | 124 | 136 | 93 | 44 | nd | nd | nd |
| 11. | NL | 116 | 123 | 95 | 82 | 56 | 58 | 60 | 66 |
| 12. | CZ | 87 | 83 | 113 | 116 | 112 | 90 | 98 | 89 |
| 13. | S | 85 | 81 | 113 | 96 | 97 | 76 | 70 | 90 |
| 14. | IRL | 108 | 80 | 74 | 67 | 76 | 46 | 51 | 61 |
| 15. | I | 96 | 69 | 74 | 49 | 33 | nd | 29 | 52 |
| 16. | BG | 60 | 63 | 68 | nd | 64 | nd | 29 | 19 |
| 17. | DK | 53 | 59 | nd | 55 | 70 | 44 | nd | nd |
| 18. | SK | 48 | 58 | 46 | 70 | 83 | nd | nd | nd |
| 19. | P | 37 | 37 | 38 | nd | 37 | 37 | 32 | 26 |
| | TOTAL EUROPE | 3 718 | 3 712 | 3 531 | 3 066 | 2 885 | 1 933 | 1 895 | 1 974 |

Source : Ernst & Young – Compiled by the EURADA Secretariat

It should be noted that in terms of job created the total number of jobs created in 2008 was 148,000, as against 176 550 in 2007, i.e. an average total of 40 jobs/project, as against 87 jobs/project in 2007, 101 jobs/project in 2006 and 93 jobs/project in 2005.

## NUMBER OF PROJECTS AND JOBS CREATED IN WESTERN EUROPE AND IN CENTRAL AND EASTERN EUROPE

| Western Europe | | | |
|---|---|---|---|
| Number of projects | | | |
| | 2007 | 2008 | Evolution 07/08 |
| Central and Eastern Europe | 1 042 | 992 | - 5% |
| Western Europe | 2 670 | 2 726 | 2 % |
| Total | 3 712 | 3 718 | 0 % |

| Central and Eastern Europe | | | |
|---|---|---|---|
| Job creations | | | |
| | 2007 | 2008 | Evolution 07/08 |
| Central and Eastern Europe | 102 910 | 76 419 | - 26 % |
| Western Europe | 73 641 | 71 914 | - 2 % |
| Total | 176 551 | 148 333 | - 16 % |

Source: Ernst & Young European Investment Monitor 2009

## CREATION OF FDI JOBS IN EUROPE

| Western Europe | | | |
|---|---|---|---|
| Sector | 2007 | 2008 | Evolution of job creation |
| Services to enterprises | 10 806 | 10 891 | 85 |
| Software | 9 329 | 5 473 | - 3 856 |
| Automotive | 6 615 | 5 193 | -1 422 |
| Financial services | 4 944 | 1 745 | -3 199 |
| Pharmaceutical industry | 3 876 | 3 419 | - 457 |
| Industrial equipment | 3 792 | 7 674 | 3 882 |
| Electronics | 3 641 | 3 249 | - 392 |
| Distribution | 3 275 | 1 254 | - 2 021 |
| Transport services | 2 437 | 3 418 | 981 |
| Electricity | 2 401 | 3 108 | 707 |

| Central and Eastern Europe | | | |
|---|---|---|---|
| Sector | 2007 | 2008 | Evolution of job creation |
| Automotive | 30 614 | 27 266 | - 3 348 |
| Electronics | 15 393 | 2 3204 | - 13 073 |
| Computer industry | 5 911 | 1 390 | - 4 521 |
| Electricity | 5 620 | 3 195 | - 2 425 |
| Agri foodstuffs | 4 660 | 5 811 | 1 151 |
| Industrial equipment | 3 521 | 4 937 | 1 416 |
| Software | 3 405 | 1 891 | - 1 514 |
| Non-ferrous minerals | 2 708 | 2 169 | - 539 |
| Textile industry | 2 604 | 900 | - 1 704 |
| Financial services | 2 407 | 892 | - 1 515 |

Source: Ernst & Young European Investment Monitor 2009

## ENTERPRISES' BANKRUPTCIES

According to the Euler Hermes Global Insolvency Index, the number of bankruptcies at work level increased by 28% in 2008 as compared with 2007, as against 4% in 2007 as compared with 2006.
Data per country :

| | | | |
|---|---|---|---|
| Spain | + 187 % | USA | + 55 % |
| Ireland | + 113 % | Italy | + 45 % |
| Portugal | + 67 % | United Kingdom | + 31 % |
| Denmark | + 67 % | France | + 15 % |

The forecast for 2009 shows a still darker situation with an increase rate of 35%. The increase rates forecast per country is as follows :

| | | | |
|---|---|---|---|
| France | + 30 % | United Kingdom | + 20 % |
| Switzerland | + 16 % | USA | + 45 % |
| Austria | + 16 % | Spain | + 58 % |
| Germany | + 19 % | Netherlands | + 75 % |
| Ireland | + 55 % | Sweden | + 35 % |
| Belgium | + 20 % | Finland | + 32 % |
| Portugal | + 30 % | | |

## BUSINESS INTERNATIONALISATION : SINGLE MARKET AND EXTR-EU TRADE

As part of preparations for **Agorada 2009**, Eurada's Board of Directors had an exchange of views on SME internationalisation and trends in intra- and extra-EU trade. The briefing paper below introduces some information in this regard.

Trade internationalisation is one of the keys to the competitiveness of businesses, and therefore of regions. At European level, internationalisation can be considered from two perspectives: intra-Community trade and extra-Community trade.

Since Eurostat does not publish any regional data on this issue, we can only rely for our analysis on trends identified among individual Member States between 2000 & 2007.

### 1. INTRA-EU EXPORTS

Total volume went from €1,805,763 million in 2000 to €2,648,061 million in 2007, i.e. an increase of 46.7%.
Unsurprisingly, Germany is the largest exporter with a 23.6% market share in 2007, compared to 21.4% in 2000. The Netherlands (11.8%), France (9.9%), Belgium (9.1%) and Italy (8.1%) are the countries benefiting most from the Single Market. While the share of countries such as Germany, Belgium and The Netherlands increased between 2000 and 2007, those of countries including France, Italy and the UK dropped sharply.
Worth noting is that the market share of the EU15 countries represented 92.3% in 2000, against 88% in 2007.

The table below shows Member State effectiveness in capturing the benefits of the Single Market based as reflected in the evolution of their share of intra-EU exports between 2000 and 2007.

Table 1 Trends in Member State's share of intra-EU exports

**Winning countries**

| Member State | 2000 | 2007 | Δ |
|---|---|---|---|
| BE | 8.7% | 9.1% | 0.4% |
| CZ | 1.5% | 2.9% | 1.4% |
| DE | 21.4% | 23.6% | 2.2% |
| HU | 1.4% | 2.1% | 0.7% |
| NL | 11.4% | 11.8% | 0.4% |
| AT | 3.0% | 3.3% | 0.3% |
| PL | 1.5% | 3.0% | 1.5% |
| RO | 0.5% | 0.8% | 0.3% |
| SL | 0.4% | 0.6% | 0.2% |
| SK | 0.6% | 1.4% | 0.8% |

**Stagnating countries**

| Member State | 2000 | 2007 | Δ |
|---|---|---|---|
| EE | 0.2% | 0.2% | - |
| EL | 0.4% | 0.4% | - |
| CY | 0.0% | 0.0% | - |
| MT | 0.0% | 0.0% | - |
| BG | 0.2% | 0.3% | 0.1% |
| LV | 0.1% | 0.2% | 0.1% |
| LT | 0.2% | 0.3% | 0.1% |
| LU | 0.4% | 0.5% | 0.1% |
| ES | 5.0% | 4.9% | - 0.1% |
| PT | 1.2% | 1.1% | - 0.1% |

**Losing countries**

| Member State | 2000 | 2007 | Δ |
|---|---|---|---|
| DK | 2.2% | 2.0% | - 0.2% |
| IE | 3.0% | 2.1% | - 0.9% |
| FR | 12.7% | 9.9% | - 2.8% |
| IT | 8.9% | 8.1% | - 0.8% |
| FI | 1.7% | 1.4% | - 0.3% |
| SE | 3.2% | 2.9% | - 0.3% |
| UK | 10.2% | 7.0% | - 3.2% |

## 2. EXTRA-EU EXPORTS

Extra-EU exports went from €849,739 million in 2000 to €1,241,416 million in 2007, i.e. a 46.1% increase. Germany's market share reached 27.4% in 2007 v. 24.8% in 2000.
Next to Germany, the most dynamic countries in these markets are Italy (11.5%), France (11.4%), the UK (10.8%) and The Netherlands (7.1%). While the Dutch share increased between 2000 and 2007, the competitiveness of both France and the UK dropped over the same period. The market share of a majority of Central European countries doubled between 2000 and 2007.

## 3. FINDINGS

Intra-community exports have been growing more strongly than extra-Community exports (as a result of the Single Market).
Unsurprisingly, Germany is the country that best leverages the potential of the Single Market.
The exports of Poland, the Czech Republic and Slovakia doubled in value between 2000 and 2007.
Conversely, the market shares of countries including France, the UK and the Scandinavian countries have shrunk over the years.

## 4. THE SINGLE MARKET AND STRUCTURAL POLICY

The Ministers of Finance of most EU15 Member States often mention that their countries are net contributors to the EU budget. In 2008, this surplus amounted to approx. €7 billion in the case of Germany, €2 billion for The Netherlands, etc.

We are convinced – and the figures presented in Table 2 below support our contention – that a substantial share of investments made in the cohesion countries using Structural Funding actually translates into export growth in the most developed countries and that there is therefore a need to adjust the amount of these Member States' net contribution to the EU budget for the indirect benefits yielded by the Single Market.

Table 2 Intra-EU export growth in some EU15 Member States, 2000-2008

M€

| Member State | 2000 | 2008 | Δ | Δ% |
|---|---|---|---|---|
| DE | 386,622 | 623,856 | 237,234 | 61.3% |
| NL | 205,247 | 313,779 | 108,532 | 53.9% |
| FR | 229,953 | 261,008 | 31,055 | 13.5% |
| BE | 158,548 | 240,660 | 82,112 | 51.8% |
| IT | 160,206 | 215,403 | 55,197 | 34.5% |
| UK | 183,544 | 186,374 | 2,830 | 1.5% |
| ES | 91,092 | 130,792 | 39,700 | 43.6% |
| AT | 54,792 | 86,645 | 31,853 | 58.1% |
| Σ | 1,470,005 | 2,058,517 | 588,512 | 40.0% |
| EU27 | 1,805,763 | 2,648,061 | 842,298 | 46.6% |

Table 3 Intra-EU import growth in some EU12 Member States

M€

| Member State | 2000 | 2008 | Δ | Δ% |
|---|---|---|---|---|
| BG | 3,748 | 12,779 | 9,031 | 241.0% |
| CZ | 26,022 | 69,069 | 43,067 | 165.5% |
| HU | 23,027 | 48,446 | 25,419 | 110.4% |
| PL | 36,602 | 88,611 | 52,009 | 142.1% |
| RO | 9,294 | 36,254 | 26,960 | 290.1% |
| SK | 9,700 | 32,610 | 22,910 | 236.2% |
| Σ | 108,393 | 287,769 | 179,376 | 165.6% |

The intra-EU imports of EU12 states grew more than €212 billion between 2000 and 2008, i.e. 23.5 billion/year on average. By comparison, these countries received €26 billion in structural funding in 2007.

## 5. MOST EXPORTED PRODUCTS

Below is a list of the 10 most exported product classes according to the SITC Rev. 4 nomenclature.

| SITC Class | Name | Percentage of total intra-EU exports in 2007 |
|---|---|---|
| 78 | Road vehicles | 12.6% |
| 77 | Electric machinery | 5.5% |
| 74 | Machinery and equipment | 4.8% |
| 67 | Iron and steel | 4.4% |
| 55 | Pharmaceuticals | 4.3% |
| 33 | Petroleum and products | 4.2% |
| 89 | Miscellaneous manufactured articles | 3.8% |
| 76 | Telecommunications and sound recording equipment | 3.4% |
| 69 | Manufactures of metal | 3.4% |
| 75 | Office machines and adp machines | 3.3% |

These ten product classes* account for nearly 50% of all intra-EU trade.

* The SITC Rev. 4 nomenclature includes 64.

## 6. INTRA-EU IMPORTS

The volume of intra-EU imports grew from €1,725,934 million in 2000 to €2,577,130 million in 2007, i.e. an increase of 49.3%.
Top importing countries include Germany (with a 19.3% market share, compared to 12.1% in) France, the UK (9.7%), Belgium (8.3%) and Italy (8.1%).
While the EU15's market share reached 92.3% in 2000, it had fallen to 86.8% in 2007, which confirms the growing importance of the markets of the EU12 countries for the EU15 Member States.
The importance of these markets is further illustrated by the data presented in Table 4 below.

Table 4 Trends in EU12 countries' share of intra-EU imports, 2000-2007

| Member State | Market share 2000 | Market share 2007 | Δ |
|---|---|---|---|
| BG | 0.2% | 0.5% | 0.3% |
| CZ | 1.5% | 2.7% | 1.2% |
| EE | 0.2% | 0.3% | 0.1% |
| CY | 0.1% | 0.2% | 0.1% |
| LV | 0.1% | 0.3% | 0.2% |
| LT | 0.2% | 0.5% | 0.3% |
| HU | 1.3% | 1.9% | 0.6% |
| MT | 0.1% | 0.1% | - |
| PL | 2.1% | 3.4% | 2.3% |
| RO | 0.5% | 1.4% | 0.9% |
| SL | 0.5% | 0.7% | 0.2% |
| SK | 0.6% | 1.3% | 0.7% |

# CALLS FOR TENDERS

## CIP - ICT

O.J. C 125, 5.6.09
Deadline: 23.9.09

Info : http://ec.europa.eu/ict_psp

Themes: ICT for goverment and governance, involving citizens for transparency decision making.