

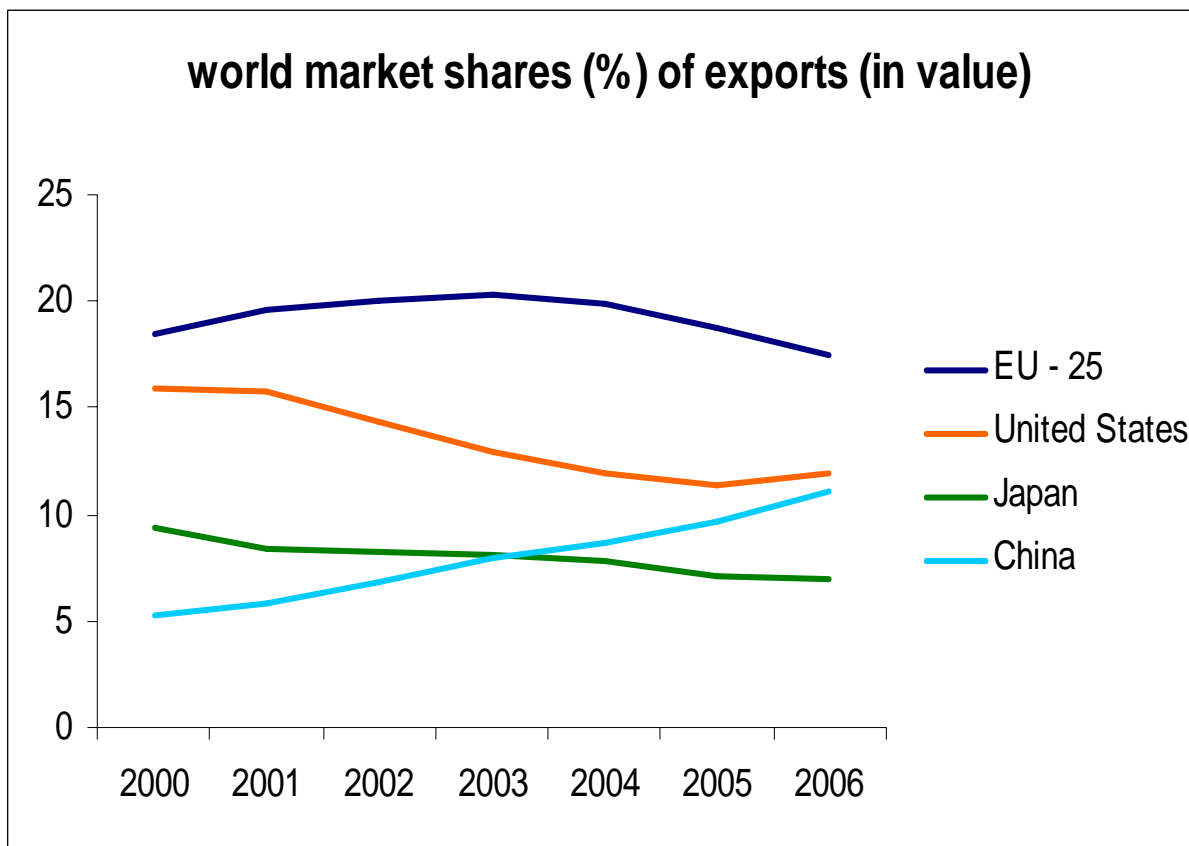


“What does Europe look like globally?”

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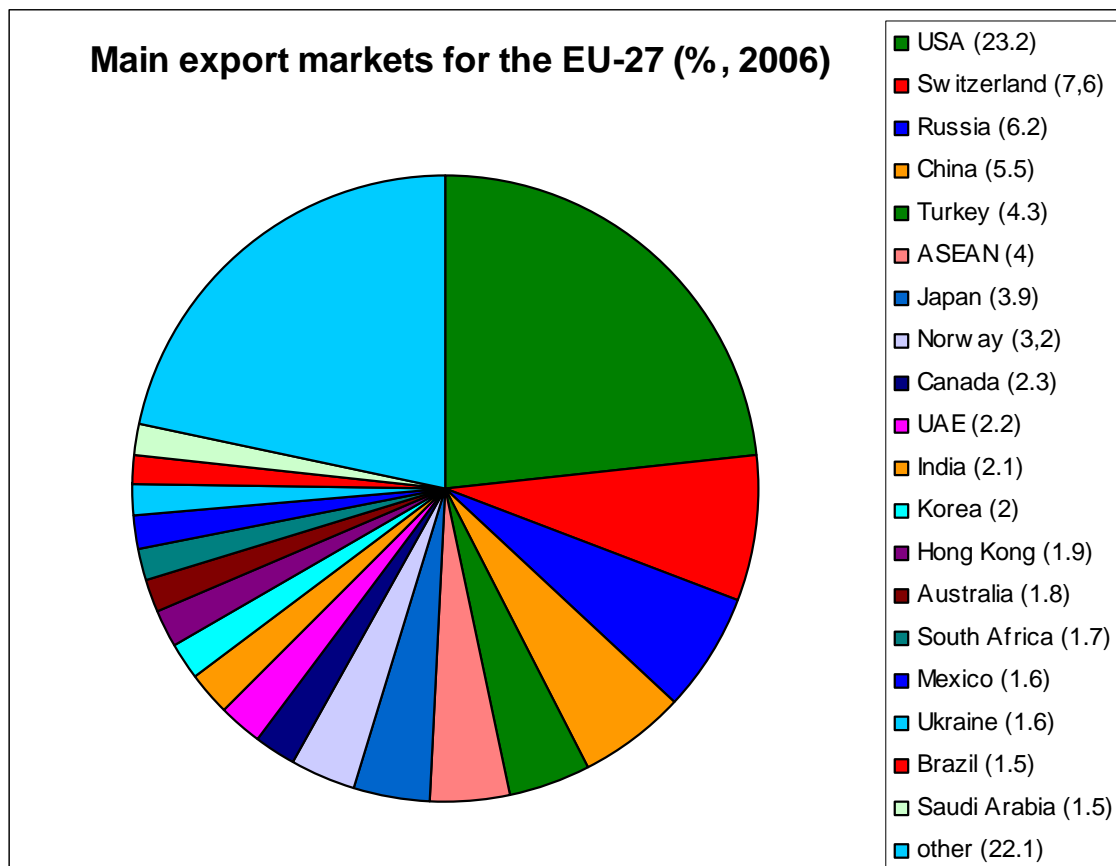
1. State of Play

A. Europe's Market Share



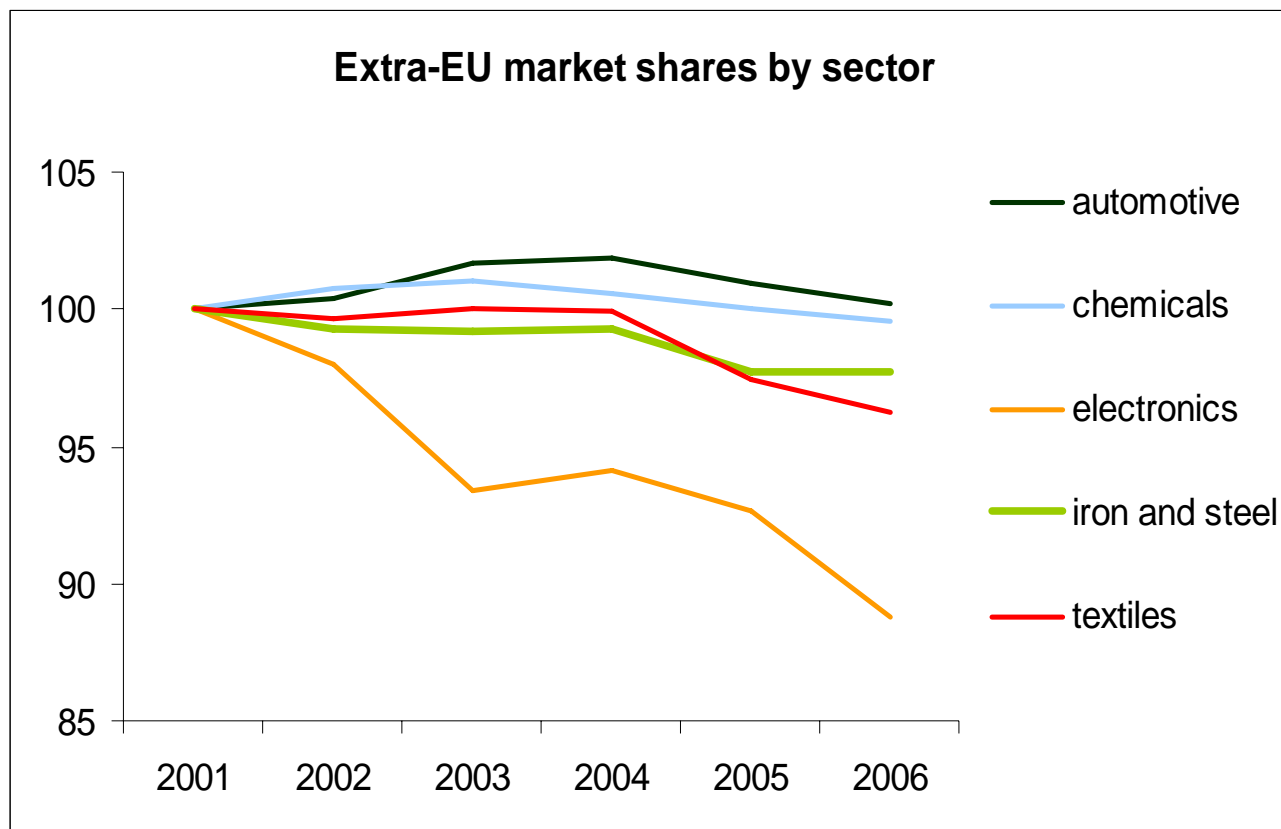
1. State of Play

B. Different Performance across Different Markets



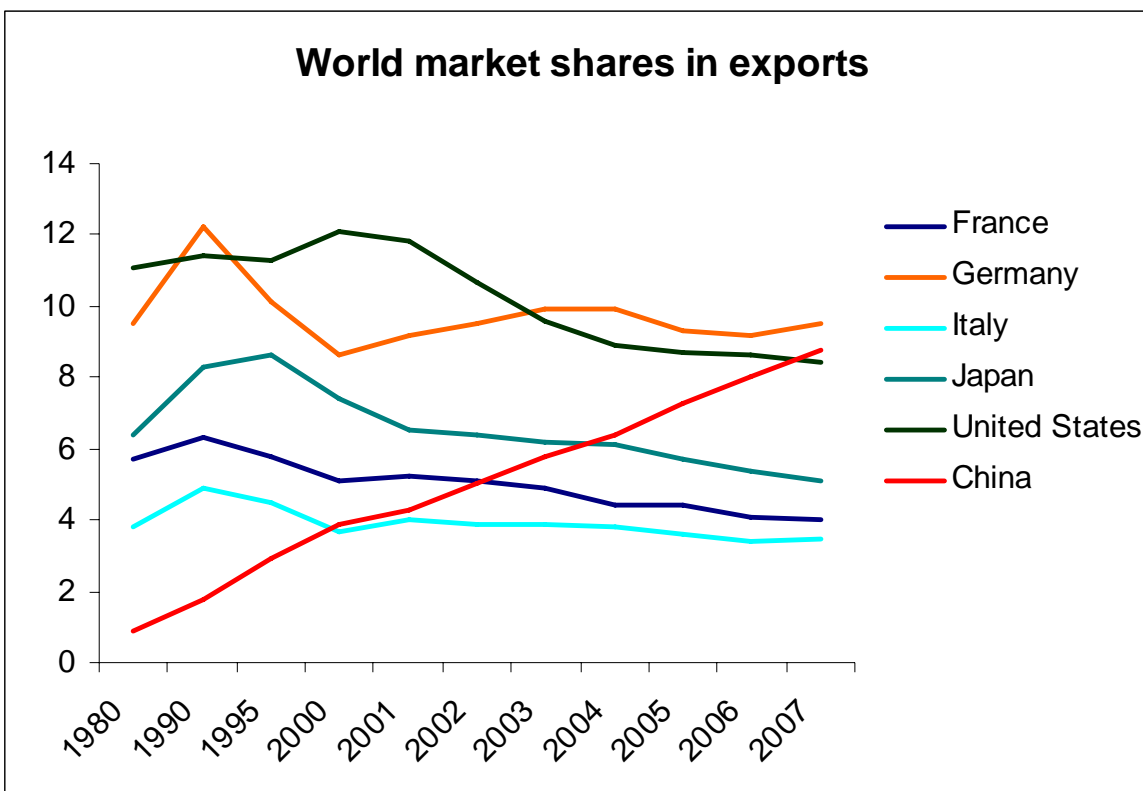
1. State of Play

C. Different performances across different sectors



1. State of Play

E. Different performances across different member states



2. Challenges

- A. Uneven implementation of the Lisbon Agenda
 - The EU internal market
 - Innovation
 - Employment rates

- B. EU Strategy on Climate Change
 - Renewable target - €259 billion
 - Emissions trading - €102 billion per year



2. Challenges

C. Exchange Rates

- Mixed effects – elasticity, oil price
- But 30% real rise in euro exchange rate

D. China

- Doubling of global market share to 11%
- Less for Europe than US and Japan



2. Challenges

E. Market access

- Low share of high growth markets
- Risk of protectionism in the US



3. Recommendations

- A. The Lisbon Agenda – Just do it
- B. Climate Change – Impossible without competitiveness
- C. Exchange Rates – Be coherent
- D. China – Enforce the rules
- E. Market Access – Open doors for EU companies



THANK YOU

