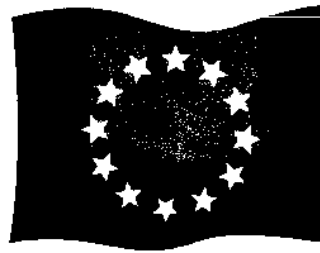


EUROPE AND US



NEW EUROPE FOR ME AS

**WOOD PROCESSING
SME**



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1 Introduction

This brochure was developed within the framework of the PHARE SME Fit programme. It contains basic information about the impact of the EU enlargement on the wood processing industry. This paper will put the Main focus on the furniture industry and industry branches dependent on construction, as especially those industry branches will be able to operate across the borders.

Wood processing industries are based on a long lasting tradition in the EU-15 as well as in the new member states, although especially in the craft sector the main customer groups seem to be different: Joiners work mainly in the top class or more individual sectors in the EU-15. Carpenters are enlarging their field of activity in building complete houses with up to four floors based on wooden materials, whereas the craft sector in the new member states is confronted with a considerably lower purchasing power and a narrow market in high value goods.

But enlarging the EU a community of 378 Mio. inhabitants will boost the competitiveness and growth of all EU members, especially those at the borders between "old and new" member states. This large market will in the end be easily accessible for all enterprises removing the existing barriers to cross border activities. This represents chances and also risks for the sector and is a big challenge for the whole economy.

To outline the economic effects of the EU enlargement various interactions between industries have to be considered: All within this sector has to expect a considerable growth, although competition will be fierce.

The four freedoms of the European Union

The European Union (EU) originally arose in the 50s as a coming-together of six states. Since 1995 the EU counts 15 members. The European Union is guided by the principles of law and democracy. Its Member States transfer their sovereignty to the EU, which jointly represents their interests as a whole. There are only a few policy fields, which have not yet been based on a common treaty: So all decisions are based on the founding treaties ratified by the member states and the treaties of Maastricht and Nice. The Intergovernmental Conference, launched on Oct. 4th will try to harmonise and develop these treaties further on in order to make a Union of 25 member states workable.

All EU citizens enjoy the “Four Freedoms”:

- **Free movement of Persons:**

means that persons may move within the EU as freely as they could previously only within a national state - and without border controls. They may seek employment, go to school or university, reside or, of course, set up business anywhere. The setting up of businesses is already foreseen in the so-called Europe Agreements, whereas the freedom to seek employment is restricted by transition periods (especially for Austria and Germany)

- **Free movement of goods:**

means, that goods may/can be exchanged as on a domestic market. There are no longer any border formalities or certificates of origin

- **Free movement of services:**

means, that within the EU, anyone may provide or take advantage of services (e.g. insurance, cross-border joinery work); also this freedom is restricted by transition periods (especially for Austria and Germany).

- **Free movement of capital:**

means, that anyone may, for example, open accounts, transfer or borrow money anywhere in the EU (*Freedom of movement of capital*).

A prerequisite for the smooth running of such a market is a framework of conditions allowing fair competition.

Some of these conditions for fair competition are:

- Easing of trade by the removal of technical barriers
- Harmonisation of indirect taxes (VAT, consumer taxes, etc.)
- Harmonisation and/or recognition of norms and certificates
- Recognition of professional qualifications
- EU-wide rules for the granting of public tenders
- Measures against unfair competition by large conglomerates
- Harmonisation of security policies (Schengen-Agreement) in order to jointly protect the external borders.

As there are various transition mechanisms and transition periods in place, not all of these freedoms will be fully in place as of May 1st, 2003:

Agriculture will not be fully liberalized, so remaining border controls for goods can be expected to be a hindrance to the freedom of movement of goods and possibly for the freedom to provide services. And the Schengen agreement will not set into force on May 1st, so border controls of persons will remain in place.

The transition periods with respect to the labour market:

Years after accession	Freedom to seek employment	Preconditions for keeping emergency clause
0 - 2 years after accession	None (national requirements remain in place)	Automatically
2 - 5 years after accession	Possible	Unilateral declaration to EU-Commission if and to what extent emergency clause will be upheld
5 - 7 years after accession	Probable	Unilateral declaration in case of serious disorder on the labour market

The transition periods with respect to the freedom to provide services (these transitory regulations are restricted to the following branches (or better sectors):

Construction and related services, cleaning services, social and security services and landscape-gardening services):

Years after accession	Freedom to provide cross-border services	Preconditions for keeping emergency clause
0 - 2 years after accession	None	Automatically
2 - 5 years after accession	Possible	Unilateral declaration to EU-Commission if and to what extent emergency clause will be upheld
5 - 7 years after accession	Probable	Unilateral declaration in case of serious disorder on the labour market

As a result the labour market as well as the services market (cross-border services) for wood-processing companies, especially joiners and carpenters, will be officially closed at least until May 2006 (minimum two year transition period -

see above), if not longer (at least in Germany and Austria). Accession countries may retaliate with the same regulations in order to keep EU-15 companies from their market.

2 Facts and figures of the woodworking industry and its competitive environment

2.1 General Figures

Annual growth rates in % of GDP

	1999	2000	2001	2002	2003e	2004e
Austria	2,0	2,5	2,2	1,3	1,7	1,8
Slovenia	5,2	4,6	3,0	3,0	3,3	4,0
Hungary	4,2	5,2	3,7	3,3	3,8	4,0
Slovakia	1,3	2,2	3,3	4,2	3,5	4,5
Czech Rep.	0,5	3,3	3,3	2,6	2,8	3,3

Industry production growth in %

	1999	2000	2001	2002	2003e	2004e
Austria	4,0	2,5	2,8	0,5	1,0	1,5
Slovenia	-0,5	6,2	2,9	2,4	3,0	3,0
Hungary	10,4	18,1	3,6	2,6	7,0	9,0
Slovakia	-2,7	8,6	6,9	6,3	5,5	6,0
Czech Rep.	-3,1	5,4	6,5	4,6	4,7	6,0

Inflation rate in %

	1999	2000	2001	2002	2003e	2004e
Austria	1,7	1,5	1,0	0,8	1,8	1,7
Slovenia	6,1	8,9	8,4	7,5	6,0	5,5
Hungary	10,0	9,8	9,2	5,3	5,3	5,0
Slovakia	10,6	12,0	7,1	3,3	7,0	7,0
Czech Rep.	2,1	3,9	4,7	1,8	1,6	2,0

Wage costs per hour in EUR

	1995	1996	1996	1998	1999	2000	2001
Austria	17,4	18,0	18,2	18,7	19,3	19,6	20,3
Slovenia	-	-	5,6	6,0	6,2	6,5	6,9
Hungary	2,1	2,2	2,5	2,6	2,8	3,0	3,7
Slovakia	1,7	2,1	2,5	2,6	2,5	2,7	2,9
Czech Rep.	2,1	2,5	2,5	2,7	2,8	3,1	3,5

Wage costs per unit, change in %

	1995	1996	1996	1998	1999	2000	2001
Austria	-0,6	-0,8	-4,4	-1,8	-1,5	-5,1	0,9
Slovenia	13,0	0,1	0,6	2,5	2,0	1,2	4,1
Hungary	-14,3	0,3	5,9	0,1	7,4	5,9	15,6
Slovakia	7,7	11,1	7,3	-0,2	-7,9	6,5	4,1
Czech Rep.	13,9	15,3	3,7	8,2	3,0	4,6	10,0

Source: WIIW

All these figures show that there is still a considerable difference in economic performance, although the new member states are catching up. Due to higher inflation rates and a reluctant development in labour-productivity the comparative advantage is diminishing as shown by the wage costs per unit, although especially in the services sectors this advantage will dominate economic decisions for many years. Due also to the relatively high inflation rates and to the lacking track record of SMEs in relation to banks these figures hint at problems especially for micro-enterprises of getting enough finance from banks. These small enterprises will be hampered in their attempts to invest in the upgrading of their machines in order to regain their productivity losses of the recent years. In the end there will be a different development within the various sectors of economy: Smaller companies will not have the same chances as larger ones, and those, which gained foreign direct investment and could invest in their future, will lead the market.

2.2 Figures concerning the furniture market

Demographic reference numbers

Population	Austria	Slovenia	Hungary	Czech Rep.	Slovakia
In 1.000	8.110	1.988	9.927	10.222	5.377
Below 15	16,8%	16,1%	17,1%	16,6%	19,8%
15 - 29	19,1%	22,0%	22,6%	23,5%	24,9%
30 - 44	25,0%	23,3%	20,2%	20,1%	21,8%
45 - 59	18,8%	19,6%	19,7%	18,2%	15,4%
60 +	20,4%	19,0%	19,7%	18,2%	15,4%

Income and expenditure per person in EUR

	Net income per year	Expenditure (consumption) per year	Expenditure for furniture	Share of total consumer expenditure	Purchasing power
Germany			419		
Austria	16.764	11.671	373	3,2%	100 %

Slovenia	4.260 (gross, without transfers)	4.715	90	1,9%	69 %
Hungary	3.197	2.747	49	1,8%	50 %
Czech Rep.	2.800	2.291	51	2,2%	51 %
Slovakia	1.872	1.836	56	3,0%	38 %

Number of flats finished, floor area per flat

	Flats finished in 2001/2000	Living space per flat in m ²	Total floor area per flat in m ²
Austria	45.850		91,9 (average)
Czech Rep.	24.759	45,2	96,3 (2000)
Slovakia	12.931	82,5	135,0 (2000)

Source: Österr. Kontrollbank AG

Figures are not available for all countries, the following main trends can be summarized: The floor area per flat is growing in all the accession countries and also in Austria, but at a very different speed. The trend in Slovakia for instance can be explained by a growth in numbers of one or two family houses. This is also valid for rural areas in other countries. The area per flat remains stable at a low level in large cities.

2.3 Consequences

The furniture industry cannot expect an increased demand of larger pieces of furniture, as the purchasing power of the average household is not big enough to replace old furniture within a short period of time. Additional area is mostly used for additional rooms (for children, storage, working purposes). At the same time an increasing area per flat does not mean a change in the use of flats: Most of the central rooms have more than one intended purpose. The living room is also often used as a sleeping room, which requires special furniture (e.g. a combined use of couches for sitting and sleeping).

Whereas in the EU-15 countries there is a balance between the construction of new flats and the renovation of older ones, the situation in the accession countries is different:

In Hungary for instance more than 31 % of all flats are older than 50 years, and one third of the newer buildings are prefabricated apartment buildings, which require renovation as well. Still 25 % of all buildings are made of loam. These

figures indicate that the construction market is not really soaring at the moment, but in the future - with increasing living standards - the construction market and following the furniture market can expect a dynamic development.

Concerning the investment possibilities it might be useful to consider, who is owning the flats:

International comparison of flats 1999:

	Freehold flats	Privately rented flats	Rented flats in publicly assisted house-building	All rented flats
Austria	56 %	22 %	19 %	41 %
Slovenia	88 %			12 %
Hungary	92 %	3 %	5 %	8 %
Slovakia	78 %			5 %
Czech Rep.	49 %	7 %	24 %	31 %

Source: European Housing Statistics (Ministry of Environment, Finland) 2001

2.4 Furnishing Trends

The existing furniture in accession countries is older than in the EU-15 countries, at least in the bordering regions. This is especially valid for kitchens and living rooms. Replacement investments seem to be at hand.

The main criteria for spending money on furniture are the following:

- Slovenia** - comfort, function, health (price, design)
- Hungary** - price (comfort, function, design)
- Czech republic** - comfort, health (price, function, design)
- Slovakia** - price, comfort, health (function, design)

In most EU member countries prices are not (any more) the main criteria for buying furniture, the other criteria playing a more important role.

2.5 Trade in furniture

Trade in furniture is already rather concentrated in the EU-15. Retail chains are dominant on the market. In market niches there you can find specialised retail shops and joiners, those niches becoming narrower in the recent years provoking fierce competition (65 % of Austrian joiners judge that the retail trade in furniture is their most important competitor). Taking into account the slow economic development in the recent years this market situation will become even more difficult for smaller enterprises, as consumers tend to invest more cautiously.

The situation in the accession countries is different: The market in Slovakia is rather fragmented, in the Czech Republic 4 companies have a market share of together 25 %, in Hungary 16 % of turn-over is done by two companies, and in Slovenia we find a rather concentrated market (60 - 70 % of turn-over by 4 companies). In all countries construction material markets also sell furniture, by mail order and increasingly through the Internet.

2.6 Production of Furniture

The production of furniture in the EU-15 has been in a crisis since the year 2000 at least. Turnover of the German wood-processing industry went down by more than 7 % in the first 6 months of 2003. The craft sector also saw a declining turnover in Germany and Austria, thus adding to the structural problems of smaller producers in a concentrating market.

The craft sector in all countries is located mainly in regional centres (villages and towns from 1.000 to 5.000 inhabitants). This at least partly eases the situation, as most of the small producers work for the local market and sell their products by themselves. The joiners - atypically - travel rather far in order to get new orders. Deliveries from Styria to Vienna or from Tyrol to Frankfurt (Germany) are not regularly done, but they show the range of activity.

So after phasing out of the transition periods all larger Austrian cities are within the reach of joiners from the accession countries. But market shares will not shift immediately, as Austrian consumers tend to trust the Austrian joiners. The same is true for the markets in the accession countries: Consumers prefer to buy national.

Although the production markets seem to be rather fragmented, taking into account the many private micro-enterprises, in all

the accession countries a small group of medium to large companies is dominating the production of furniture:

Slovenia: 27 large enterprises account for 67 % of total turnover.

Hungary: 28 large enterprises account for 50 % of total turnover.

Czech republic: 4 large enterprises account for 10 % of total turnover.

Austria: About 1/3 of total turn-over is provided by large enterprises, the craft sector being traditionally stronger than in the accession countries because of the unbroken history of private entrepreneurship.

2.7 Import Situation in Accession Countries

In Slovenia imports in the furniture sector grew by 2 % every year (1996 - 2001), Austrian exports grew by 26 % per year, leading to a market share between 4 and 15 %. Imports from "cheap" destinations - 10 most important importers - had a share of 20 % in 2001.

In Hungary imports in the furniture sector grew by 5 % every year (2000 - 2002), Austrian exports grew by 2 % per year, leading to a market share between 2 and 8 %. Imports from "cheap" destinations - 10 most important importers - had a share of 42 % in 2002.

In the Czech republic imports in the furniture sector grew by 11 % every year (1995 - 2001), Austrian exports grew by 20 % per year, leading to a market share between 0,2 and 6 %. Imports from "cheap" destinations - 10 most important importers - had a share of 60 % in 2002.

In Slovakia imports in the furniture sector grew by 14 % every year (1997 - 2001), Austrian exports grew by 14 % per year, leading to a market share between 0,1 and 4,4 %. Imports from "cheap" destinations - 10 most important importers - had a share of 59 % in 2001.

In the Czech Republic and in Slovakia Poland has a large share in the import market, but mainly at the low end of prices and of quality. This market-share will possibly shrink, if Polish producers will not invest in quality and design.

2.8 Public tenders

The internationalisation of the public orders might have an effect on bigger wood-processing enterprises, because they are stronger in price competition than small enterprises and they meet capacity requirements better. The directive on public tenders, particularly relevant for large orders, will change previous tender practice. The thresholds will have to be adapted to respective EUR-values.

Information about published calls for tenders (which have to be publicly announced) can be found in:

- The EU data bank TED (Tender Electronic Daily - Internet address)
- The Official Journal of the EU, Supplement S
- Advance notices about Call for tenders by EU
- In national or regional media

Aims of the directive are:

- Obligation of contracting authority to inform in advance about all planned supply contracts exceeding the thresholds.
- Obligation to give the reasons for every call for tenders
- Obligation of the contracting authority to strengthen the application of European standards
- Orders above the threshold values must be tendered in the EU-25
- Legal means against any discrimination of bidders

Eligibility criteria

- Exclusively the criterion of the lowest price
- Economically most advantageous offer due to different terms (price, delivery deadline, running costs, profitability, quality, design, advisability, technical value, customer service and technical help). These criteria are usually ordered according to importance.

3 Four Freedoms

3.1 The Free Movements of Goods

Upon entry into the EU, there is an end to all borders, border controls and rules on certificates of origin. This means that goods can be supplied and sold without any trade barriers, duties or other restrictions such as waiting at borders (see transition mechanisms above).

Tax Harmonisation¹

Correct application of EU tax rules is a prerequisite for the functioning of the Single Market. The EU Treaty prohibits any tax discrimination, which would – directly or indirectly – give an advantage to national products over products from other Member States. It calls for harmonisation of turnover taxes, exercise duties and other forms of indirect tax. VAT (Value Added Tax) was the first tax to be harmonised.

The single European market was completed on 1 January 1993. From this date goods, persons, services and capital may be moved freely within the EU. The main VAT-arrangements applicable after this date are:

- For private persons buying goods in another member state VAT is levied in the country in which the goods are bought (the principle of the country of origin). They can then return home with their purchases without being taxed again.
- For trade in goods between businesses in member states VAT is levied in the member state to which the goods are transported (the principle of the country of destination) at the rates and under the terms of that member state. The business supplying the goods applies the zero rate. The business receiving the goods submits a tax return with regard to the goods purchased in another member state. The formerly applicable import VAT will be replaced by acquisition tax within the European Union. Exports will continue to be exempt from tax in the country of origin. The acquisition tax is to be paid to the revenue authorities in the country of destination. The acquisition tax must be paid by the purchaser and can be declared as input VAT from the point at which the tax is due, enabling the importer to receive a refund of input VAT in the VAT prepayment period including tax on imports and acquisition.

¹For further information:

http://europa.eu.int/comm/taxation_customs/publications/info_doc/taxation/tva/taux_tva-2003-5-1_en.pdf

- The standard VAT rate cannot be set at less than 15%. Member States have, however, the option of applying one or two reduced rates, equal to or greater than 5%, to a limited list of categories of goods and services.

For private individuals the origin-based taxation remains as a basic principle of the common VAT system, for trade in goods between businesses in Member States it is the principle of the country of destination. One condition for a tax-free intra-community supply is the VAT identification number.

The Value added tax identification number aims to ensure that VAT regulations concerning goods supplied and transported within the European Union are correctly applied. The VAT identification number of the supplier must be included on all invoices. The revenue authorities are responsible for assigning VAT numbers.

For exporters, exports to another EU Member State will only be tax-exempt, if the purchaser quotes his VAT identification number. The validity of the VAT identification number of the purchaser has to be checked by the supplier.

The supply of goods by a VAT-registered trader in one EU Member State to a VAT-registered trader in another EU Member State will normally qualify as an intra-Community supply. A VAT-registered trader may zero rate the supply of goods to a customer in another EU Member State if

- The customer is registered for VAT in an other EU Member State,
- The customer's VAT registration number is obtained and retained in the supplier's records
- The supplier must note on the invoice „zero-rated intra-Community supply“
- The goods are dispatched or transported to that other EU Member State
- The supplier must quote his customers' VAT registration number on the sales invoice.

European standardisation

The aim behind European standardisation is the harmonisation of norms throughout Europe to ease the exchange of goods and services by the removal of trade barriers that can arise from differing technical requirements. CEN, Europe's multisectoral standardisation organisation, has the task of working out

norms that conform to the basic safety requirements in the respective directives: For instance, the directive on construction material, which might be important for the construction of windows and doors with special requirements (fire and smoke protection), sets down the basic safety requirements, and the norms define the technical way how to achieve the safety requirements.

If a respective product fulfils the requirements set out in a norm, the entrepreneur can obtain a CE-mark for this special product (after having passed a certification procedure), and then the product can be placed on the EU-market. Mind that there might be national requirements on the allowed use of these products.

Whoever merely claims conformity and affixes a CE Mark without preparing the technical documentation or without adhering to the directive in every aspect, risks a fine, a ban on selling his product, or even a recall of a product already delivered.

History

- 1971** Publication of the "Council Directive concerning the co-ordination of procedures for the award of public works contracts" (Public Works Directive)
- 1988** Publication of the "Council Directive on the approximation of laws, regulations and administrative provisions of the Member States relating to construction products" (Construction Products Directive)
- 1990** Mandate to CEN to issue EUROCODES as pre standards (ENV)
- 1998** Start on the conversion of the pre standards into final norms

Current breakdown

- EUROCODE 0 Principles of planning structures
- EUROCODE 1 Actions on structures
- EUROCODE 2 Design of concrete structures
- EUROCODE 3 Design of steel structures
- EUROCODE 4 Design of composite steel and concrete structures
- EUROCODE 5 Design of timber structures
- EUROCODE 6 Design of masonry structures
- EUROCODE 7 Geotechnical design

EUROCODE 8 Design provisions for earthquake resistance of structures

Address of the national standardisation institute and the name of person responsible for wood processing:

Other regulations

The EU is developing a regulation that defines flame-retardant ignitability of upholstered furniture. It should be guaranteed that after initial contact with an "inflammation source" the fire would not further develop.

Packaging regulations: In principle, all manufacturers must take back packaging for free and pass it on for recycling. There is a special regulation valid for wood-based transport packaging. These may be thermally handled in approved facilities if they were not treated with wood protection means.

Product liability: At present the EU importer is primarily liable for the purchased product: The EU customer can fall back directly on the importer. Afterwards the importer can reclaim the damage directly from the producer. The importer might calculate with a higher risk reserve to be able to cover his potential additional costs. He might put pressure on the product price. The private customer can also reclaim his damages directly from the producer (from any EU Member State).

3.2 Free movement of persons

Free choice of working location

The principle of the free movement of people enables every employee who is a citizen of an EU Member State the free choice of working location in any Member State in accordance with the principle of equal treatment. The aim is the creation of a cross-border labor market. EU citizens may now work in any Member State without a working permit. Wages and other working conditions must be the same for all employees. Social security regulations ensure that employees working in another EU Member State can add together entitlements built up there and not lose any. See transition periods.

Setting up an enterprise

The freedom to set up an enterprise gives those pursuing a trade and self employed the opportunity to be commercially active throughout the whole area of the EU. The citizen of another EU Member State has to be treated in the same way as a

citizen of the home country. There are already now no restrictions between the EU-15 and the accession countries.

The systems of professional qualifications vary from Member State to Member State. Recognition of professional qualifications/certificates of competence is consequently a significant prerequisite for the free movement of people. For many professions the recognition of professional qualifications is regulated in directives. Normally a person having been an entrepreneur or directing an enterprise for a period of at least 6 years qualifies for home treatment in any EU country without having to pass national master exams. (In Austria the Ministry of Economy and Labour is dealing with these issues). Information about the registration of an enterprise can be obtained in the above-mentioned ministry or at all regional economic chambers in Austria or at the crafts chambers in Germany. In Germany, the precondition for running an own craft enterprise is a registration before the start-up: Responsible for registration is the craft chamber in the district where the profession will be carried out for the first time or constantly. Additionally there are restoration requirements with the tax and social insurance authorities.

3.3 Free movement of services

This freedom guarantees that all persons or enterprises are equally able to offer services inside one country and across borders. Every entrepreneur is entitled to send his workers and salaried employees to provide services in another Member State provided he respects the prevailing legal regulations in the host country (minimum wage, minimum holidays e.g.). But, in principle, entrepreneurs and their employees cannot be required to pay pension and social security contributions etc. twice. See transition periods.

4 Opportunities and threats for wood-processing SMEs (in the Accessing Countries in an enlarged European Union)

- **Small enterprise**

Good local network, raise awareness level of customers	No sufficient awareness level
Emphasize quality and service	No sufficient performance profile
Specialisation	
Commercial expansion for	Competition form abroad from

enterprises close to borders	enterprises close to borders
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- **Object specialists**

Good contacts to foreign architects, construction companies	Increased number of foreign traders in own trading area
Ensure information about tenders	Balanced employment
Reasonable market extension	Price pressure
Development of optimal cost structures	
Specialisation on types and sizes of objects	

- **Series products**

New trade relations	Sufficient performance differentiation
Decreased dependence on single buyers	Competitive cost structures
Specific products with higher quality	Price pressure
Personal contacts with buyers (retailers)	

- **Restaurants and hotels as buyers**

Regional style orientation	Project time pressure
Specialisation on object size	Price pressure
Direct contacts with restaurants - hotels	Additional competitors in own trading area
Contact with specialised architects	
Advertisements in specialised periodicals	

- **Restorers**

Style specialisation	No sufficient awareness level
Technology specialisation	
Contacts with trade in antiques, with exclusive	

furniture producers, with auctioneers	
Specialisation on conservation of monuments	

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