

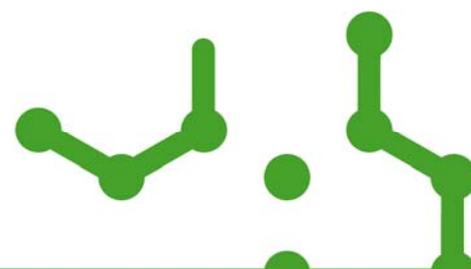


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Delivering the HLG results in the regions:
Follow-up Conference to the High Level Group
on the Competitiveness of the European
Chemical Industry

April 16 - 17, 2009
Ústí nad Labem, Czech Republic



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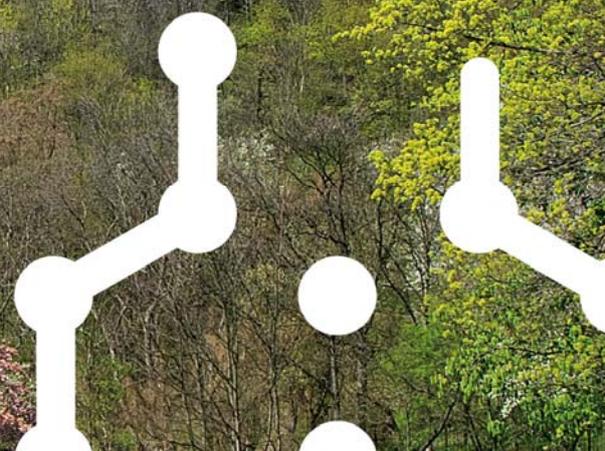
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Final Report



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Introduction

Only two months after the High Level Group on the Competitiveness of the Chemical Industry in Europe finished its work, a first Follow-up Conference took place in the Ústí Region of the Czech Republic.

The conference aimed at presenting the results of the HLG towards a wider audience in the chemical regions, to focus on the practical steps of implementing the HLG recommendations and to give an input into the ongoing work towards preparation of the European Competitiveness Council.

The conference was jointly organised by the Ústí Region and the European Chemical Regions Network and supported by DG Industry and the Czech Presidency.

This support also reflects the active role played by the Chemical Regions during the work of the High Level Group over the past years.

The final report of the conference shows that there was a wide range of presentation focussing on the specific link between the overall competitiveness of the chemical industry in Europe and its meaning and impact on the ground.

The large number of speakers and participants reflected the interest and the range of topics of the HLG discussions for the chemical regions in Europe.

It also showed that a follow up process to the High Level Group is necessary to monitor the implementation of the recommendations and to adapt its focus in light of the current economic crisis.

The ECRN suggested in a declaration adopted by the Presidium to establish a **Competitiveness Agenda for the Chemical Industry in Europe**. This is precisely what is needed to cope with the challenges of the current economic crisis and the longer- term challenges of the industry.

This is the key message of the Ústí conference and its degree of implementation will be the proof of whether the High Level Group was a success.

The Ústí conference was a very good step in this direction and we thank everybody who made this successful event possible.

Jana Vaňhová,
Governor of the Ústí Region

Dr. Reiner Haseloff,
President of the European Chemical Regions Network and Minister for Business and Labour of Saxony-Anhalt

Main Findings of the Conference

The follow-up conference to the High Level Group on the Competitiveness of the Chemical Industry in Europe in Ústí nad Labem set out to present and communicate the final report of the High Level Group on Chemicals, in particular the implementation of its findings with specific regard to the Czech Presidency and the regional dimension of the HLG work.

The main findings of the conference can be summarised as follows:

- All presentations and discussions on the conference highlighted the need for a rapid implementation of the HLG recommendations regarding more innovation and research; a responsible use of natural resources; a level playing field for sourcing energy and feedstock with open markets and fair competition in the years to come.
- At the event the chemical regions suggested developing a **Competitiveness Agenda for the Chemical Industry in Europe** to ensure the rapid implementation of the 39 recommendations of the High Level Group.
- The Czech Presidency as well as the representatives of the European Parliament present at the conference confirmed their interest in a follow-up process to the High Level Group at the Council and also at the European Parliament level.
- It was underlined that in light of the current economic crisis the HLG recommendations can give an important direction for the short-term measures necessary.
- In this respect it was highlighted that the chemical industry in Europe does not require direct financial support but will benefit if measures that support the main user industries such as energy efficiency or greener car initiatives are launched.
- Regarding **innovation**, the conference participants discussed the vital role of the chemical industry as an enabling industry for new solutions. In this context innovation is not only the application of new technologies but includes also the openness to testing new approaches.
- It was highlighted that a better co-operation of initiatives such as the European Technology Platform SusChem and innovation initiatives at regional level are vital for a more efficient use of resources and to accelerate the rate of innovation in Europe.
- The European Chemical Regions Network was identified as an important partner to link up the regions with European stakeholders in the future.
- Regarding the challenge of **climate change**, it was stated that the chemical industry should be more confident in its ability to apply tougher efficiency targets and should see the policies mitigating climate change as a big opportunity for new solutions.

- However, it was also stated that Europe must be sensitive to those industries that might be exposed to relocation due to different standards in climate policy legislation on a global scale.
- Therefore the conference confirmed the need for the rapid implementation of the ETS directive and to pay careful attention to the outcome of the upcoming Copenhagen conference on climate change. There is no time to waste in determining the exposure of the energy intensive industries to carbon leakage.
- The competitive advantage of the European chemical industry is its high level of integration, the large internal market and its high level of innovation and flexibility.
- The conference discussions underlined that the dialogue between the social partners and public authorities can play an important role at European, national and regional level. This could be an important tool in developing innovative solutions to keeping the workforce, particularly in the difficult times ahead.
- Regarding **chemical logistics** the conference draw attention to key challenges for chemical sites, particularly in Central and Eastern Europe where most chemical products are transported by road. The conference confirmed the necessity for chemical regions to be actively involved in developing new approaches to chemical logistics in the future.
- The ChemLog Project can act as a backbone to ensure a more coherent approach towards the regional, national and European level and to overcome existing gaps in chemical logistics in Central and Eastern Europe. Extending this approach to other parts in Europe was also discussed.
- Another key role for the regions currently lies in implementing the **chemical regulation** - particularly with regard to chemical SMEs. Several strategies of how chemical regions are trying to improve communication, advice and co-operation in applying the regulation on the ground were presented. It was also underlined that the implementation of chemical regulation will remain of key relevance for the chemical regions in years to come.

At the end of the conference it was agreed that the chemical regions should continue to play an important role to implementing the findings of the High Level Group and continue to play an active role as important stakeholder at all levels.

Summary Report

First Day: PERSPECTIVES OF THE CHEMICAL INDUSTRY IN EUROPE

Welcome Addresses

A welcome address was given by the Governor of the Ústí Region, Jana **Vaňhová**, stressing the importance of the industry to her region, the Czech Republic and Europe as a whole. She thanked the European Commission and the Czech Presidency as well as the European Chemical Regions Network for organising this event to deliver the results of the HLG work to chemical regions and to discuss its implementation.



The President of the European Chemical Regions Network and Minister for Business and Labour of Saxony-Anhalt, Dr. Reiner **Haseloff**, welcomed the high number of representatives taking part in the Conference organised by Ústí Region in conjunction with the EU and ECRN. He also stated that the participation of the European Chemical Regions Network in the High Level Group on the Competitiveness of the Chemical Industry in Europe clearly showed the interest and the commitment of the chemical regions to be an active stakeholder for the European institutions in the future. During this process the membership of ECRN has grown to 20 regions and there are others that have also applied to join.

President Haseloff also informed the participants that the ECRN Executive Board met prior to the meeting and had adopted a Position Paper on the Follow Up process of the High Level Group. In this paper the ECRN called for a **Competitiveness Agenda for the Chemical Industry in Europe** as a framework for the future implementation of the HLG recommendation.

President Haseloff was confident that the chemical industry in Europe will recover from the current financial and economic situation. He was optimistic that the measures already being taken to step up demand in the automotive sector, for example will have a positive impact on the chemical industry.



When the EU considers environmental issues it needs to have a global view of the situation and avoid an exodus of the industry to other parts of the world with less stringent legislation. Account needs to be taken of the sector contribution to improving the environment through the production of lighter improved performance cars and the production of insulation products etc.

In the forthcoming decisions on the implementation of HLG results, regions need to have their voices heard and their views taken into account. We are not lobbyists or representatives of a target group; our aim is to secure the future of chemical regions. One of the future issues has started to be addressed by the ECRN through the ChemLog project on Eastern Europe connectivity. The EU needs to competitive so

that world problems will have less of an impact in future. The HLG initiative needs to be taken very seriously to develop the Single Market further.

Mr Haseloff stated that he was very impressed with Ústí Region's organisational skills, the strength of their industry, the landscape and the city and venue. He thanked the HLG and the EU for backing the Conference and everyone who had contributed to delivering the event.

Opening Session: The Opportunities and challenges of the European Chemical Industry in light of the findings of the HLG

Moderator – Councillor Tony **Richmond**, ECRN-Vice President

Speakers:

- Erik Geuss, Deputy Minister for Industry and Trade of the Czech Republic
- Gwenole Cozigou, Director of the Directorate 8, DG Enterprise and Industry, European Commission
- Miroslav Ouzký, Member of the European Parliament and Chairman of the ENVI Committee
- Pavel Švarc, President of the Association of Chemical Industry in the Czech Republic and member of the CEFIC Board of directors



Councillor Tony **Richmond** is an elected representative of Darlington Borough Council - one of the five Unitary Authorities that makes up the Tees Valley, which is one of the largest chemical complexes in the UK.

Erik **Geuss**, the Deputy Minister for Industry and Trade of the Czech Republic expressed his pleasure that the HLG Conference was taking place in the Ústí Region. A long chemical industry tradition exists in the region and they have very well trained people and it makes a significant contribution to GDP.



In 2007 the HLG was launched and the world situation was very different then. The aim now should be on maintaining the industry and eliminating the impact of the global recession and to provide a clear and workable legal framework and level playing field. The HLG provides the flexibility to respond to these challenges. Industry needs to seek solutions to reduce energy consumption and to invest more in innovation.

At the moment ETS, emissions reduction, energy efficiency and climate change are the biggest threat to industry. Industry representatives inform us that they would like to see current working of the climate change package reworded, especially regarding benchmarking. The ChemLog initiative is important to Eastern EU regions. The industry is dependent on export. Every effort should be made to resist protectionism and preserve free and fair trade and for the EU to continue to work on

the Doha Agreement. Results of the HLG must be applied according to the different conditions existing in different Regions. More involvement from SMEs is required, with more investment in innovation and efforts made to maintain the engineering intensive part of the industry.

The Czech Presidency wants to include the HLG findings in the Competitiveness Council Meeting scheduled for May. A national HLG has been formed in the Czech Republic where representatives from Government and industry will discuss problems and solutions. Mr Guess wished the conference every success.

At the beginning of his intervention, the Director of DG Enterprise and Industry, Gweno**le Cozigou**, expressed apologies on behalf of the Vice-President of the European Commission, Günter Verheugen. Director Cozigou stated that the Commissioner maintains a keen interest in the work of the High Level Group and would have liked to be able to come to Ústí as he was involved previously as the Commissioner for enlargement. The European Commission is very grateful that the Ústí Region and ECRN took the initiative to organise this event as part of the programme to disseminate the results of the HLG and assist in the function of moving towards the implementation of the HLG recommendations.



The High Level Group was established two years ago when nobody was expecting the current financial crisis. The focus of the Final Report is on the factors influencing to the long term competitiveness of the European chemicals industry, and is the culmination of an impressive amount of work. In a time of storm the course must be clear. The chemical industry is strongly affected by the economic crisis, both because of the downturn experienced by some major customers – such as the automotive and constructive sectors – and because, being capital-intensive it is vulnerable to turbulence in the financial markets.

Potential exists within the sector as a solution provider of some of the most pressing global challenges, such as energy, food, water and health care. As a true “enabling industry”, the chemical sector is still vital to the success of many other sectors. Three key elements were identified for the future competitiveness of the industry:

- more innovation and research,
- a responsible use of natural resources and a level playing field for sourcing energy and feedstock and
- open markets with fair competition.

All of these areas need attention and are closely linked to each other. Co-operation of the private sector, public sector and civil society, experienced in the HLG needs to continue during the implementation phase of this work to ensure success.

As innovation is the key element for competitiveness, the quality and intensity of R&D and the effectiveness of innovation need to be increased by encouraging more efforts by more companies. Best Practice needs to be relayed and improvements need to be made in time to market. SusChem is a good start in promoting strong

clusters. Legislation and the protection of intellectual property rights play a major role, but SMEs sometimes have difficulties to cope with the high number of regulatory requirements and are less able to protect their know-how. The quality of legislation, correct implementation and proper enforcement are important and high on the agenda of the Commission..



Notwithstanding the importance of knowledge in providing solutions, the chemicals industry is a resource-based industry. The European chemicals industry is not in a favourable position for that, its main competitive advantage being only its high integration and proximity to end use markets (clusters). For this reason, integration within clusters and the infrastructure between clusters need to be strengthened. Regions need to work on this, particularly

in Eastern Member States. Avoiding carbon leakage is important.

Climate change is a global issue that requires global answers not only from industrialised countries, but also with the contribution of emerging ones. The implementation of the new ETS Directive, agreed by the Parliament and the Council at the end of 2008, requires to close existing data gaps and the Commission is working hard on this topic. Climate change is certainly a challenge for the chemicals industry but also a major business opportunity.

Open markets are important for an industry that is globalised. Better access to foreign markets is needed, in particular to those in emerging economies where growth is largely concentrated. Trade liberalisation through the elimination of tariffs would be in the interests of the EU industry and this is even more important in the current climate of looming protectionism. It is hoped that these measures will be achieved in the framework of the World Trade Organisation, although it may take efforts and time to come to the desired result. In any case, the Commission will be vigilant on all unfair trading practices.

Recommendations given in the Final Report have gained importance because of the financial crisis. This Conference will provide additional input to the discussions and contribute to the plans for the implementation of the recommendations. It is hoped that the levels of co-operation achieved in the HLG will continue during the implementation phase.

Miroslav **Ouzký**, Member of the European Parliament and Chairman of the EU Environment Committee, stated in his speech that the Conference is a significant step in the follow up to the HLG meetings and its ideas need to come to the notice of decision-makers. Conclusions of the HLG recognise the impact of the sector. In his role in the Environment Committee Mr Ouzký's work included consideration of EMAS and the climate package. It is an important achievement that the Committee wants to establish a roadmap to energy savings, but



does not want industry to relocate to outside of the EU. A follow-up Conference on energy is to be held in Copenhagen and it is important which industries are classified as energy intensive. It is easy to determine what the EU wants, but the impact of the global recession isn't yet fully known. If India and China do not agree to climate change measures then this would create a burden on the EU industry.

Mr Ouzký hopes that the outcome of this Conference will become a living document and he signalled his commitment to play an active role in discussion about the HLG report in the European Parliament after its elections in June this year.

Pavel **Švarc** from the Association of Chemical Industry in the Czech Republic stated that employment and mitigation of climate change depend on this capital intensive, conservative industry. Media affects public opinion and has an impact on competitiveness that often pushes the industry into a defensive position. It is also certain that



NGOs will keep up the pressure on the industry. Continuing competitiveness relies on, trading conditions, feedstock availability and price and the same levels of regulation.

The HLG should produce a vision, to develop the industry, but any vision needs implementation. The leading question must be; is it realistic to continue REACH and ETS and should costly regulations be put on hold? Will the recom-

mendations of the HLG be put into practice?

Panel 1: Innovation as a key driver for competitiveness of the Chemical Industry in Europe

Moderator: Andrea **Tilche**, DG Research, European Commission

Speakers:

- Gernot **Klotz**, Executive Director, Research and Innovation CEFIC
- Frank **van Lissum**, Representative of the Province of Limburg

Andrea **Tilche** welcomed the speakers and participants to the first panel. In his introduction, he stressed the importance being given to the issue of innovation in the final report of the High Level Group; he was therefore looking forward to hearing and discussing this topic from different perspectives. He then briefly introduced the first speaker, Dr. Gernot Klotz from CEFIC, to the audience.

In his presentation on “Innovation a key driver for competitiveness of Europe (including the Chemical Industry) – Delivering the High Level Group results in the regions”, Dr. Gernot **Klotz** gave an update from the chemical industry's point of view on what the current and future economic challenges for European society are and what consequences the chemical industry has already drawn from the HLG recommendations on innovation. In this regard, he also mentioned the future role and priorities of the European Technology Platform SusChem.

He started by pointing out the world-wide structural shifts currently taking place and how they challenge Europe and its society incl. industry sectors, and stressed the importance of sustainability, which has become a catalyst of innovation. He stressed that even though there are many different and disperses activities on the European, national and regional level going on to foster innovation and competitiveness, a single European approach which would lead to more cohesion and a common direction is still missing (and still has to be created from the HLG recommendations. In order to support innovation, it would furthermore be necessary to complement the wide range of successful policy actions on research with new ones with a focus to providing solutions to the societal challenges and speed up innovation, (a bigger focus on development and pre-competitive activities). In EU and member states policies, research is often a synonym for innovation. In practice, innovation goes way beyond research: it is about turning ideas into sustainable markets and thus competitiveness which in turn enables a sustainable society. Innovation is not only limited to technologies, Europe needs a new innovative mindset both in institutions and policy makers and in industry cooperation. It therefore needs different approach



Coming to the practical consequences drawn by the chemical industry concerning the HLG final recommendations on innovation, Dr. Klotz then introduced to the participants 11 concrete priority actions developed by the industry ranging from the strengthening of innovation networks, demonstration projects, , further development of human resources for innovation, extending the remits of the EU technology Platform SusChem to improvements of communication and information. EU institutions, member states, regions and other stakeholders are invited to participate in the implementation of these actions.

Dr. Klotz then gave a strategy update of the European Technology Platform SusChem and also pointed out three main current tasks of the platform in order to enhance innovation: Ensuring and improving quality input into European and national research and innovation agendas; managing of the complex European-wide SusChem network with a multitude of national TPs to ensure complementarity; adding a “business through innovation” element to SusChem in order to broaden the traditionally research-driven areas.

At the end of his presentation, Dr. Klotz once again stressed the importance of sustainable development of the chemical industry, the fact that innovation is not only new technologies but also mindset and an investment which requires a long-term reliable vision and a guiding framework. He furthermore pointed out once more that research has to be complemented by innovation support tools and asked the “EU innovation system” to significantly improve in areas of complementarities and optimized timelines.

He ended his speech by calling all stakeholders involved in the HLG, and especially the European Union and the member states, to take the HLG recommendations seriously, adopt them as soon as possible and provide solutions through partnership.

Innovation has to be treated as an investment by society to deliver solutions, which requires leadership and a guiding framework, in which research excellence must be complemented by innovation support tools. The “EU Innovation system” must significantly improve in areas of complementarities and shorter timelines for implementation. Dr. Klotz proposed the year 2010 as the next round of review of the implementation of the recommendations under the lead of the EU Commission to keep the current momentum for the long term initiatives towards solutions requested by the EU public.

Mr. Tilche thanked Dr. Klotz for his presentation from the industry’s point of view and handed over to the next speaker, Frank **van Lissum** from the Province of Limburg (NL).

In his presentation “Open Innovation in a European Chemical Region”, Mr. van Lissum presented a practical example of innovation efforts in a European region by introducing the project of developing the concept of “open innovation” in the Province of Limburg.

He began by pointing to the fact that in the face of globalization and growing competition, choices for the provincial politics concerning innovation in the overall approach for the years to come had to be made. Therefore, Mr. van Lissum continued, the decision was taken to focus on investing and connecting. As the speed of processes of innovation has to increase nowadays, an “acceleration agenda” has been developed as an economic strategic political agenda by the Province of Limburg to tackle current challenges e.g. by focusing on becoming an innovative knowledge economy which supports selected growth potentials in certain clusters. Mr. van Lissum explained that three clusters with growth engines and growth potential have been identified (clusters on Healthcare, Chematerials and Energy and Agro and Food) and that close links between these clusters and the companies involved have been an important feature in the open innovation strategy, since the interaction of people working together is one of the main aspects of the approach.



The next step after successfully organizing interaction among companies on the regional level is to involve other regions, Mr. van Lissum pointed out. In the case of the Province of Limburg, this was done in 2008 by forming the “TTR” (Technological Top Region) together with 6 other partners from 3 European countries which joined together as a functional region based on different strengths which complement each other; as he explained: Regions which are strong on the production side, for example, are complemented by others which are strong concerning knowledge and innovation, for example. The TTR has been a success so far, which Mr. van Lissum demonstrated by showing the audience several graphs with the conclusions of economic benchmark analyses where the TTR ranks very highly in areas like growth and size of technology sector, Technological Competitiveness Index etc.

Mr. van Lissum ended his presentation by mentioning the ongoing steps: In order to further elaborate the TTR objectives and strategy, a business plan was decided upon at the end of 2008 in order to drive the project further.

The moderator Andrea Tilche thanked both speakers for the presentations. A question from the audience was raised by Thomas Wobben, Director of the Representation of Saxony-Anhalt to the EU, about a closer cooperation between the SusChem platform and regional initiatives as the one just presented from Limburg could be possible.

The speakers agreed that this was an interesting point, and Dr. Klotz stressed that even though the focus of SusChem is above all reaching the national level of the Member States, regional developments like the one Mr. van Lissum had just presented are of course very welcome and important as it shows an innovative way how to bridge the internal institutional barriers within the EU and member states, which traditionally slow down innovation in the EU.

Panel 2: Natural Resources, Energy and Feedstock for the Chemical Industry in Europe

Moderator: Ladislav **Novák**, Director of the Association of Chemical Industry in the Czech Republic

- Massimo **Buscemi**, Councillor of the Region Lombardy
- René **van Sloten**, Executive Director International Trade & Competitiveness, CEFIC
- Mikael **Karlsson**, President of the European Environmental Bureau
- Martin **Kubů**, General Director of PREOL a.s. Lovosice

Ladislav **Novák** introduced the second panel by highlighting the role of natural resources and feedstock as well as the climate changes policies in the European Union for the long term competitiveness of the chemical industry in Europe.

The Councillor of the Lombardy Region, Massimo **Buscemi**, explained that the focus on innovation and renewable energies is necessary, in order to restructure the economic system and particularly the chemical industry in Europe. Furthermore he underlined the role of various EU regulations for the European Chemical industry and particularly focussed on the European energy and climate change policies which have a direct impact on the chemical industry being energy intensive and therefore also impact on the chemical regions.



The recommendations of the High Level Group on the Competitiveness of the Chemical Industry in Europe have shown that the competitive advantage of the chemical industry in Europe lies in the high level of integration and its ability to adapt.

Drawing on his recent experiences at the Americas Cup Races on the shores of Valencia in Spain, where the second boat had to choose a new course instead of sim-

ply following the leading boat to have a chance of winning, he linked this race to the task ahead for the chemical industry in Europe during these difficult times.

European chemical industry and the chemical regions will only emerge strengthened by the current economic crisis if the crisis is seen as a chance for change, innovation, and better connectivity, particularly in the field of energy efficiency.



He underlined in this respect the importance of a well-developed pipeline network as a precondition for gas supply and stable economic relations with the gas suppliers. This is essential for economic development and sustainability.

Mr. Buscemi also focussed in his speech on measures taken in the Lombardy region on extending the links between chemical sites in the region and his interest in inter-regional co-operation in the field of energy efficiency. He also invited the participants to reflect on a joint co-operation project in this field which could be presented during the EXPO planned in Lombardy in 2015.

At the beginning of his intervention René **van Sloten** presented some key data on the economic development of the European chemical industry. The European Chemical Industry has a share of approx. 29 percent of world chemicals production, more than 1.2 million people are occupied directly in 28,000 enterprises. 96 percent of the employees work in enterprises with less than 250 employees. Indirectly the chemical industry creates as many as 2.4 million jobs.

The European Chemical industry can be characterised as a global industry which is innovation- and knowledge-driven, which is capital and the technology intensive with a high integration along the value chain.

Mr. van Sloten stated that labour costs in the chemical industry are higher in the European Union than in many other parts in the world but he also underlined that there are significant differences also within the European Union. This is also the case for the productivity of the industry.

In comparison with the chemical industry in Asia the European chemical industry has some advantages and some disadvantages. In Europe there is, for example, a good infrastructure, but at the same time other regions are quickly catching up. Furthermore the dependence on Russian gas is very high. Other problems are the rise of energy prices in recent years and high taxes on raw materials, for example.

Europe often produces the best products with the best technology worldwide, but the basic conditions are unfair in several respects. Therefore, the competitiveness of certain products is in danger.

Mr. van Sloten described the strengths of the European chemical industry as having a big integrated home market, highly competitive chemical companies as a result of



successful restructuring efforts of the enterprises to adapt to the world market, the high degree of integration, a well qualified and skilled employees as well as good innovations and competitive clusters, e.g. biotechnologies.

At the same time the chemical industry is confronted with weaknesses such as: high import pressure such as in the speciality chemicals segment, high energy and raw material prices; many new technologies are in the markets much faster in other parts of the world and a number of new competitors are emerging, such as China.

European chemical companies are well set up to meet the challenges but others also do not sleep. Worldwide competition also means that there is a constant danger of eroding the competitiveness of Europe. On the other hand, the high growth rates in other parts of the world are also an opportunity for the chemical industry in Europe.

Dr. Mikael **Karlsson**, the President of the European Environmental Bureau, opened his statement by referring to the ongoing climate change challenge. While in 2001 it was thought that an increase of the world temperature by 3 to 5 degrees would have a number of significant effect on the world climate, today research points at already an increase of 2 to 4 degrees would be enough to cause the same effects.

He stated that there still are too few attempts to combat climate change; people are aware of the climate change challenge and, referring to the upcoming European elections, they expect that something more will be done about it. He also expressed hopes that the current discussion between the EU and the US would lead to a more active role for the US in the field of climate change policies.



All together two basic changes are necessary in climate politics: the introduction of new technologies and the change of behavioural patterns. Chances and challenges would arise at the same time from environmental changes. The chemical industry can play a significant role in this because many solutions are closely linked to the application of chemicals. But measures are necessary also within the chemicals industry as such, e.g. to improve energy efficiency in the industry. Dr. Karlsson challenged the assumption that energy efficiency is at its end in the chemical industry. Therefore, 'business as usual' can not be an option.

Dr. Karlsson underlined that Europe must be take the lead in the fight against the climate change. The politics have to be proactive, must focus on the lowering of emissions and involve the technologies of tomorrow. Well balanced and strictly applied environmental legislation in the European Union can help to ensure the competitiveness of the European chemical industry in the future. With regard to the Emission Trading System in Europe he stated that full auctioning gradually should be phased in but that there must be sensitivity to those industries being most sensitive, even though there in no support in general that climate policy legislation causes carbon leakage.

Martin **Kubů**, the General Director of PREOL a.s. Lovosice highlighted the future role of renewable energy in Czech Republic in his contribution. He drew two conclu-

sions: the prize disadvantage for this must be diminished and the use of bio-energy should be improved in favour of the reinforced application by biomass of the second generation. The use of renewable energy is rising, nevertheless, we have to ask if this has a sustainable effect.

Based on the example of his enterprise, Mr. Kubů showed how the application of renewable energy can be applied. PREOL is, according to his statement, a big consumer of energy. The use of biomass is regulated by the Czech government, but support given in comparison to the solar energy is less than in Germany. The fundamental question within the EU is: Why are the subsidies for renewable energy not enough?



In the Czech Republic the use of biomass started to increase from 2000 onwards new developments are taking place: The biofuels of the first generation are being increasingly replaced by biofuels of the second or third generation. Mr. Kubů ended his presentation by giving an example of how the generation of bio-fuels and the chemical production takes place on a joint site in an integrated way.

In a **discussion with the audience** following the presentations Dr. Karlsson was asked what the NGOs will do to implement the recommendations of the High Level Group particularly regarding climate change. Dr. Karlsson stated that NGOs will continue to defend their interests and participate in events while underlining that the NGO community has an interest in a competitive chemical industry in Europe as long as it works to increase its ambitions and strengthen its practice to protect health and the environment. He also underlined the support for the work of the European Commission to the meet the climate change challenge, even though objectives need to be more ambitious.



A question was directed to René van Sloten about how the level playing field between the European Member States regarding renewable energies can be ensured. Rene van Sloten underlined the role of Single Market regulation and European competition policy and stated that current imbalances should not be reinforced further by subsidies or other distorting incentives.

Wojciech Lubiewa Wielezyski from the Polish Chamber of Chemical Industry stated that there is also a need to develop a joint vision on the future transport and logistics network in those Member States that joined the European Union in 2004. He also underlined the security of supply of feedstock as a key challenge for the European chemical industry. René van Sloten referred to this statement by highlighting that the main advantage of the EU for the chemical industry is its integrated market and the chemical cluster.



Panel 3: Proximity matters – the regional dimension of the chemical industry in Europe

Moderator: Karl-Uwe **Bütof**, Head of Department, Ministry of Economic Affairs and Energy of North Rhine-Westphalia and ECRN Vice-President

Speakers:

- Reinhard **Reibsch**, General Secretary of the European Mine and Energy Workers` Federation (EMCEF)
- František **Hrobský**, Head of Safety and Health Protection Department of the HSE&Q Division of UNIPETROL SERVICES, s.r.o. and Chairman of the Labour protection Committee of the Association of Industry and Transport of the Czech Republic
- Wolfgang **Schnabel**, Supply Chain Manager, DOW

Karl-Uwe Bütof welcomed the audience and the participants of the panel and shortly introduced the first speaker, Reinhard Reibsch, General Secretary of the European Mine and Energy Workers` Federation (EMCEF).

In his presentation “European Social Dialogue in the Chemical Industry”, the General Secretary of the European Mine and Energy Workers` Federation (EMCEF), Reinhard **Reibsch**, explained the background, role and mechanisms of social dialogue on the European level and especially in the chemical sector, as well as recent projects and challenges.

He started by pointing to the legal and political background of the European Social Dialogue, which was fixed in the Treaty of Maastricht in 1993. The legal base is Art. 139 of the Treaty of the European Union. Mr. Reibsch made clear that the European Social Dialogue is one of four elements of the EU Social Policy Agenda, and only the social partners alone decide on the work programme, rules and agendas.

Concerning the chemical industry sector, the European Social Dialogue has been recognized since the end of 2004, as Mr. Reibsch pointed out, and the two European social partners are the European Trade Union Federation for Chemicals, Energy and Mining (EMCEF) and the European Chemicals Employers Group (ECEG). Mr. Reibsch made clear that this European Social Dialogue on chemistry already had a history since 2000 by several activities and conferences were at the beginning organized by different national social partners and after 2003 by ECEG and EMCEF.



The European Social Dialogue on chemistry has biannual working plans, and three thematic projects have been developed so far: The first project was the new European legislation REACH, as Mr. Reibsch explained, and a common position was adopted in September 2005. The second project concerned the improvement of health and safety at the workplace. Here an important focus was on strengthening the social dialogue in the member states with particular attention to the new EU members which had joined in 2004. Mr. Reibsch informed the audience that the final

report on this project, “Occupational and Health Protection at the workplace in respect to chemical substances in the European Union”, is available on the EMCEF website. The third project was carried out in 2007 and 2008 and concerned the sensitive issue of restructuring, as Mr. Reibsch pointed out. The aim was to collect examples of good practice and to give recommendations on how best to deal with restructuring. Facing the current economic crisis, it is planned to continue this working project in May 2009.

In finalizing his presentation, Mr. Reibsch also mentioned the regional dimension of the social dialogue and stressed that since regional differences and cooperation will play a more important role in the future, he considers a future close cooperation with the European Chemical Regions Network (ECRN) to be very important.

Moderator Mr. Bütöf thanked Mr. Reibsch for his contribution and opened the discussion by asking the speaker for his impressions concerning the intensity of social dialogue activities on the regional level. Mr. Reibsch replied by pointing out that activities on regional level are very different in intensity since they depend very much on national cultures/traditions in this respect.



During the discussion, Thomas Wobben, Director of the Representation of Saxony-Anhalt to the EU, made the comment that concerning the challenge of restructuring, the European Social Fund could be used more as an instrument on the regional level, which was welcomed by Mr. Reibsch. A question raised by Thomas Schuster from the Ministry of Economics, Transport, Urban and Regional Development of Hessen, referred to the situation in other industry sectors concerning a European Social Dialogue. Mr. Reibsch explained that so far, the sector social dialogue in the chemical industry is the only one in a big industrial sector. Most of the other more than

30 social dialogues are in service sectors, but also some smaller industries. However, he added that the automotive sector is on its way to setting up a European Social Dialogue as well.

Mr. Bütöf then introduced the next speaker of the panel the Head of Safety and Health Protection Department of the HSE&Q Division of UNIPETROL SERVICES, s.r.o. and Chairman of the Labour protection Committee of the Association of Industry and Transport of the Czech Republic, František **Hrobský**.

In his speech on “Plant safety in chemical regions”, Mr. Hrobský started by briefly presenting the legal situation on this issue and then mentioned several important matters concerning plant safety. In this context the strategy taken by UNIPETROL SERVICES was also pointed out. He finished by mentioning certain structural problems which continue to exist.



By presenting some of the most important EU legislative acts and how they have been transposed into national law in the Czech Republic, Mr. Hrobský made clear that the legal situation concerning plant and work safety in the EU is very complex and therefore quite demanding for the companies. He briefly

introduced the main players involved in plant safety in the Czech Republic and the EU and how the system of control is organized.

Concerning relevant issues of plant safety, Mr. Hrobský pointed out that the prevention of emergencies is of course the most important goal of all efforts, and that his company is in close contact with the public authorities in this regard. Open communication and dialogue with all relevant stakeholders is seen as essential by his company, as Mr. Hrobský explained, also in order to improve the image of the chemical sector towards the public. Furthermore, he added that suppliers and other partners are chosen very carefully. As “safety” is not a very concrete term, Mr. Hrobský then explained that there are three dimensions of safety from a company’s point of view: People (which means the need to hire the most careful and reliable working staff, which reduces the risk of human failure), technology (which means possessing the necessary testing instruments for all kinds of relevant systems, etc.) and organization (which includes the internal organizational structure necessary to introduce safety systems). Concerning the results his own company has achieved in the context of work and plant safety, Mr. Hrobský presented the audience some graphs which showed that UNIPETROL is at the forefront across Europe in this respect.

He finished his presentation by pointing to some structural problems which should be solved, e.g. the fact that there is still no sufficient insurance system in the Czech Republic, and that the implementation of legislation should be easier and communication between authorities and companies even more intense.



Moderator Mr. Bütof thanked Mr. Hrobský for this example of a company’s strategy in this area, and since there were no further questions from the audience, Mr. Bütof handed over to the last speaker of this panel, Wolfgang **Schnabel**, Supply Chain Manger from DOW.

Mr. Schnabel gave a presentation on “Supply chain management and logistics – Challenges for the Chemical Industry in Central and Eastern Europe”. After some introductory remarks on Dow and its presence in Central and Eastern Europe, Mr. Schnabel first outlined the current situation concerning logistics and competitiveness of the chemical industry in Europe and especially in Central and Eastern Europe, and then presented some proposals on how to overcome certain challenges and to improve competitiveness.

Mr. Schnabel continued his speech by stressing the huge importance which logistics has acquired during the last 30 years and; it is nowadays one of the most important competitiveness factors for the chemical sector.

Mr. Schnabel then described the competitive situation of the chemical industry and the importance of either having established pipeline networks or a direct sea connection for the competitiveness of the sites. In this context, he pointed to the current situation in Central and Eastern Europe, where chemical sites are inland sites without the sophisticated logistic networks that would be needed to realize the growth regarding the markets in Eastern Europe. Therefore the realization of a stronger in-

teraction among the sites as is the case in Western Europe, is a key challenge. Apart from this, however, there are also other challenges for the logistics in this part of Europe, as Mr. Schnabel explained, and he mentioned among others the incompatibility of rail systems in West- and Eastern Europe, bureaucratic problems, differing technical, safety and social standards and lack of qualified staff.

In order to tackle these challenges and to improve competitiveness, Mr. Schnabel continued by presenting several proposals for action, among others a better coordination of pan-European infrastructure projects, a harmonization of standards, more investments in rail- and road infrastructure, in terminals for inter-modal transport and in the building of alternative ports for short sea transport and more transfer of know-how, experience and expertise from Western towards Eastern Europe. On this last point, Mr. Schnabel finally introduced the ChemLog cooperation project as a very good example of an initiative. ChemLog is an INTERREG project which started in the end of 2008 and aims at the exchange of experience and cooperation to improve framework conditions for chemical logistics in Central and Eastern Europe.

Conclusion of Day One of the Conference



At the end of the first day session of the Conference, the Advisor to the Deputy Minister for Industry and Trade of the Czech Republic, Oldřich Macák, gave a short summary of the discussions of the day.

He underlined the key role of innovation and research for developing new products and processes for meeting particularly the environmental challenges of the future. He stressed the role of the industry as an enabler for new solutions to meet societal needs in the future.

The European chemical industry is a competitive industry in a global market. Therefore any changes in regulations at European level can also have an impact on competitive position of the industry towards other regions in the world.

At the same time it is essential to combine the necessary measures to meet the challenge of climate change with a longer term vision of the competitiveness of the industry in Europe. By referring to the example raised by Mr. Buschemi he stated that new ways and approaches might be necessary for the future.

Gala dinner

At a joint dinner hosted by Jana Vaňhová, the Governor of the Ústí Region, a welcome address was given by the General Secretary of CEFIC; Alain Perroy, General Secretary of CEFIC and a key note speech was delivered by Oldřich Vlasák, Member of the European Parliament and Chairman of the Association of Cities and Municipalities of the Czech Republic.

Oldřich **Vlasák** referred in his key note speech to the role of the chemical industry in the Czech Republic. As Chairman of the Association of Cities and Municipalities of the Czech Republic he also underlined the role of the local and regional au-





thorities in making the link between chemical industries and other stakeholders. With regard to the European Parliament he signalled his support for discussion of the findings of the HLG after the election to the European Parliament.

In his contribution Alain **Perroy** underlined the positive role the European Chemical Regions can play to link the debate on competitiveness of the chemical industry at European level with the chemical industry and other stakeholders on the ground. This first follow-up conference is therefore an excellent start for implementing the High Level Group results on the ground. He underlined the need for a concise concept on how the HLG recommendations are implemented in the coming years. He suggested that the Euro-

pean Commission develop an Action Plan with a clear Roadmap on how to follow up the HLG recommendations.

Second Day: DELIVERY ON THE GROUND – IMPLEMENTING THE HIGH LEVEL GROUP RECOMMENDATIONS IN CHEMICAL REGIONS

Re-Opening of the Conference

The conference was re-opened by a statement of the Director of the ECRN-office in Brussels, Michael **Hack** underlining the role the ECRN can play in the dissemination of the HLG results and by explaining the purpose of the second day of the conference: to focus on practical matters on how to implement the recommendations of conference day 1 on the ground. He invited the participants to join the workshops on logistics, innovation and REACH.

Workshop 1: Chemical Logistics and Cluster Development focussing on Infrastructure and Intermodal Transport

Moderation: Dr. Gunthard **Bratzke**, Head of isw Institute, Halle

Speakers:

- Hannelore **Hofmann-Prokopczyk**, University of Applied Science, Upper Austria
- Judit **Thomka**, Regional Development Holding, Hungary
- Wolfgang **Schnabel**
- **Marcello Miani**, Province Novara
- Wojciech Lubiewa **Wielezynski**, Polish Chamber of Chemical Industry

The results of the SWOT analysis of the ChemLog project were presented by Hannelore **Hofmann-Prokopczyk** from the University of Applied Science, Upper Austria. She pointed out that a first evaluation of the responses given to the questionnaires is currently under way by the Austrian experts. Preliminary results show the wide range of expectations and specific problems of the project partners regarding chemical lo-

gistics. It is now up to the experts to come up with a clear analysis of joint challenges and approaches in improving chemical logistics in the partner regions.

After a short overview about strengths / weaknesses and threats / opportunities of the Austrian chemical logistics the following suggestions were discussed to carry out the the work in the coming months:

- a methodology to analyse the results of the questionnaire,
- the selection of priority projects and the development of an implementation strategy,
- the development of a time plan with clear milestones as well as
- the consideration of reducing carbon footprints and to optimise transport chains within the scope of the evaluation.

Further presentations were given by Judit **Thomka**, from the Regional Development Holding and Wojciech Lubiewa **Wielezynski** from the Polish Chamber of Chemical Industry as project partners in the ChemLog project. On the part of the project partners from Hungary (region of Záhony), Italy (province of Novara) and Poland the regions were briefly introduced in terms of the (chemical) logistics and practical experiences were presented concerning the implementation of the ChemLog project.

Examples of intermodal transport links between Hungary and Russia as well as between Slovakia, Hungary and Russia were discussed at the meeting.



In addition, perspectives of chemical logistics in the province of Novara were identified and the need for basic political decisions (e.g. development plans under stronger consideration by logistics) were articulated. Perspectives for the development of

chemical logistics in Poland were looked at, in particular the removal of current gaps in the pipeline system (gas, oil and ethylene).

During the workshop debate the following aspects of future project work were discussed:

- the necessity of a clearer definition of deficits and actions for the development of the chemical logistics as well as the request to the more qualification of the ChemLog project from Pan-European view
- the further development of visions within the scope of the implementation of the ChemLog project with view a view to strengthening the economy in the countries involved as well as
- other actions in the ChemLog project: for instance setting up a political platform for the implementation of the results in concrete policy actions – it is therefore planned to carry out bilateral talks with involved governments beginning with the Czech government (followed by Polish government etc.).

Workshop 2: Strengthening Innovation in chemical clusters

Moderator: Michael **Hack**, Director of the ECRN office in Brussels

Speakers:

- Andrea **Tilche**, European Commission DG Research
- Gernot **Klotz**, CEFIC
- Dries **Lodewijks** and Theo **Hommels**, LIOF
- Mr. **Le Thuaut**, AXELERA
- Thomas **Wobben**, Representation of the State of Saxony-Anhalt to the European Union

Mr. **Hack** welcomed the participants of the workshop and briefly introduced the speakers. He stressed the special importance of the topic for the ECRN and introduced the structure of the workshop, which would start on a general level and then continue with some examples from practice.

Mr. Hack then handed over to the first speaker, Andrea **Tilche** from DG Research from the European Commission.

In his presentation “Strengthening innovation in chemical clusters”, Mr. Tilche outlined the vision of all future innovation being also eco-innovation, since environmental technologies and eco-innovation will be the key elements of future growth. Given the situation in Europe, clusters can play an important role concerning innovation and competitiveness, as Mr. Tilche explained, even though successful innovation is a very complex process based on a combination of factors. He defined three types of innovation clusters and networks: Thematic clusters, regional/local clusters, and clusters along the value chain, and finalized his contribution by presenting the European Institute of Innovation and Technology (EIT) which proposes a full integration of the “knowledge triangle” of research, innovation and education.

Mr. Hack thanked Mr. Tilche for his contribution and handed over to the next speaker, Dr. Gernot Klotz from CEFIC.

Dr. Klotz gave a presentation on “clusters for innovation” and started with the remark that fundamental change is needed in Europe in order to bring successful innovation forward in times of crisis. He pointed out that concerning successful innovation in the EU, often the problem is that research is taking place on a very high level, but as it is not complemented well (e.g. with development and pre-marketing), the realization of these new ideas can become difficult. Therefore, Dr. Klotz asked for an increase of synergy between innovation actors, and a more solution-driven instead of knowledge-based approach. He finalized his contribution by pointing to the fact that at the moment, improving and developing existing clusters is more important than creating new clusters, and that in order to reach those improvements a joint effort should be made by all actors involved.



Following this presentation, a question was raised by Thomas Wobben, Director of the Representation of Saxony-Anhalt to the EU, about whether the public support for innovation should rather be support for general measures or focus on specific measures and sectors. Dr. Klotz replied that this depends on what is needed and wanted by the authorities: On the one hand, of course, the focus on innovation must fit in the overall policy strategy; on the other hand, however, clear solutions are more easily reached by a more specific approach.

Mr. Hack thanked Dr. Klotz and introduced the next speakers, Dries **Lodewijks** and Theo **Hommels** from the Limburg Development and Investment Company (LIOF).

In their presentation on “Organizing Open Chemical Innovation on a European level”, the two speakers from LIOF started by presenting the Province Limburg as a chem-materials region and then shortly introduced the “open innovation” concept as the answer to the need for a new business model in the area.

Mr. Lodewijks stressed that since the key words of the open innovation concept are “value chains” and “networks”, the most essential challenge was to create an environment where people can meet and work together, and he explained the strategy the Province of Limburg had adopted to achieve this. In this context, he also presented three companies which have successfully made use of the innovation concept. The next step after the concept has been introduced on the regional level is to share best practice on the European level, as was explained by the speakers, where the ECRN might play a role. Furthermore, cross border demonstration projects will be used as the third building block of an open chemical innovation structure in Europe, as Mr. Hommels made clear. The speakers finalized by mentioning some of the lessons learned so far.

Mr. Hack thanked Mr. Lodewijks and Mr. Hommels for their contribution which finished the first part of the workshop. Turning to practical experiences, Mr. Hack introduced the next speaker, Philippe Le Thuaut from AXELERA.

Mr. **Le Thuaut** presented the French cluster AXELERA to the participants. Firstly he gave an overview on AXELERA’s founders, members and partners, and the governance structure. Then he mentioned the cluster’s aims and the strategies used in order to reach them. He pointed out that the cluster’s aim is to successfully combine chemistry and environment and that, after only 3 years of existence, AXELERA now has 161 members, 2/3 of which come from industry, half of which are SMEs. He furthermore presented the cluster’s strategy which combines a special attention for SMEs with different programmes to foster a strong spirit of innovation which he explained in detail. Apart from that, AXELERA is also strongly internationally connected within an inter-cluster network and other activities, as Mr. Le Thuaut pointed out. He finalized his contribution by pointing to the fact that AXELERA has recently redefined its strategy and developed a roadmap for the coming years until 2015.

Mr. Hack thanked Mr. Le Thuaut for the presentation of this example of a very successful cluster and handed over to the last speaker of the workshop, Thomas **Wobben** from Saxony Anhalt.

In his presentation “ChemClust as a response to the HLG recommendations to innovation”, Mr. Wobben presented the “ChemClust” INTERREG IV C application. The two main objectives of the project are to accelerate innovation in clusters in chemical regions by a number of measures and to profile interregional cooperation as a key instrument to achieve this. He continued by describing the elements of the project implementation and thereby also outlined two examples of best practice (open innovation on chemical parks and the organization of chemical parks towards knowledge sites) explaining how these concepts would be transferred to three pilot projects. Mr. Wobben gave then an overview on the steps ahead and pointed out that final project approval is expected in September 2009. Mr. Hack thanked Mr. Wobben for this contribution and opened the discussion.

During the following debate, the question was raised also how companies involved in networks, clusters etc. would in the future be able to differentiate if cooperation gets stronger and stronger. Mr. Le Thuaut and Dr. Klotz both agreed that competition between the companies involved will continue and the companies decide themselves how far they want to go in certain aspects of cooperation. Mr. Tilche added that in the future, a more innovative way of thinking will be necessary and the question

should be asked if companies should create products or if they should be solution providers. In the context of sustainability, the issue of life-cycle assessment was raised by another participant who stated that he was not sure if the aspects of sustainability, eco-design etc. were sometimes rather blocking innovation instead of promoting it. Mr. Tilche expressed his surprise about this position and pointed out that he did not agree with this point of view. Dr. Klotz underlined that in his opinion, not only new business models are needed, but also new policy business models, and Mr. Wobben referred to this by pointing to the fact that SusChem could be better combined with regional initiatives and perspectives as an idea for future cooperation.

Mr. Hack finished the workshop by thanking all speakers and participants for their interest and their contributions and pointed out that ECRN will follow-up on this topic at seminars and at its conference, further details on which will be published on the ECRN website.

Workshop 3: Implementing REACH in the regions

Moderator: Hanny **Nover**, Ministry of Affairs and Energy of North Rhine-Westphalia

Speakers:

- Jan **Kolář**, National Helpdesk Czech Republic
- Jean-Pierre **Feyaerts**, National Helpdesk Belgium
- Tine **Cattoor**, essenscia
- Alejandra **Sánchez**, LEITAT



The Czech and the Belgian representatives from national REACH helpdesks provided information on their activities and the needs for their national chemical indus-

tries. Mr **Feyaerts** (B) referred to the main change that REACH brought about in comparison to previous legislation: the full responsibilities for enterprises concerning procedures and risk assessment activities. He referred to the different help and guidance documents offered by the European Chemical Agency (ECHA) in Helsinki, the national helpdesks and the supporting activities by chemical associations, consultancies and other regional activities.

Alejandra **Sánchez** then presented a regional activity from LEITAT technological Centre in Barcelona and Tine **Cattoor**, from essenscia, the Flemish chemical association in Belgium, explained the different tools for supporting especially small and medium enterprises in their regions. They focused on training, mentorship and coaching programmes.

The European Chemical Association, CEFIC, and the Italian Chemicals Association, Federchimica, commented extensively on the problems and deficiencies after the pre-registration period in the so-called SIEFs (substance information exchange fora). CEFIC saw the necessity to take actions at European level for finding tools supporting the workability of SIEFs and announced that it would raise this point in the next meeting of the ECHA Management Board.

Final Session

Moderation: Karl-Uwe Bütof, Head of Department in the Ministry for Economics of North Rhine-Westphalia and ECRN Vice-President

- Klaus Berend, Head of the Chemicals Unit, DG Enterprise and Industry, European Commission
- Arno Fišera, Deputy Governor of the Ústí Region

Karl-Uwe **Bütof** chaired the final session of the conference. He highlighted in his opening remarks the variety of topics and the active involvement of the participants of the conference over the last two days. He also underlined the need for further action at European, national and regional level to work on the implementation of the HLG recommendation. On behalf of the ECRN he informed the participants that in May a further consultation of the implementation of the HLG results will take place in Düsseldorf in his region and the 7th Congress of Chemical Regions which will be held on November 6th in the Wallonia region in Belgium.



He used the opportunity to thank the European Commission, DG Industry, for their support in making this conference possible, he also thanked the Czech Presidency for including this follow up event in the official Presidency programme and finally he thanked the Ústí Region and particularly Markéta Pokorná and her colleagues for their commitment and work over the past months to make this conference truly a success.

He then handed over to Klaus Berend, the Head of the Chemicals Unit in DG Enterprise and Industry for some concluding personal remarks to the conference.

Klaus **Berend** expressed his appreciation for the content and the organisation of the conference, which achieved its objective of disseminating the messages from the High Level Group. He recalled that the chemical industry in Europe is a success story and an important player in terms of employment and economic development in Europe.



He underlined that the European Chemical Regions Network will have a key role in the implementation of the HLG recommendations – together with industry itself, Member States and the Commission. He emphasised that energy and climate change have been important topics for the HLG and during the conference – in particular the need for a correct implementation of the ETS Directive and its special provisions for energy-intensive industries. At the same time, the chemicals industry will be a key provider for solutions for problems such as climate change and other important challenges that modern societies face. These will be new business opportunities for the industry. To exploit these opportunities, intensifying innovation and research will be required. Acceptability of innovation by society can be improved with better and more transparent communication. Referring to the ChemLog project he stated that it could be a good tool for identifying promising projects in the area of logistics for the future.



He thanked the ECRN and the Ústí Region for organising the event. He commended the Czech Presidency for drawing attention to the need for the actual implementation of the HLG recommendations in the upcoming conclusions of the Competitiveness Council in May.

Finally Arno **Fišera**, the Deputy Governor of Ústí Region, expressed his satisfaction with the conference. He thanked the European Commission for their support and the Czech Presidency for their interest as well as the European Chemical Regions Network for their commitment to make this event truly a success. He stated that the Ústí Region is a chemical region where industry and citizens are working and living side by side. He finally thanked all participants for their active role in the conference and closed the event.

Annex 1: Programme

15th April **Networking dinner**

16th April **Perspectives of the chemical industry in Europe**

9:45 – 10:00 Welcome by Jana Vaňhová, Governor of the Ústí Region

Welcome by Dr. Reiner Haseloff, President of the European Chemical Regions Network and Minister for Business and Labour of Saxony-Anhalt

10:00 – 11:15 **Opening: The opportunities and challenges of the European Chemical Industry in light of the findings of the HLG**

Moderator: Councillor Tony Richmond, ECRN Vice-President

- Erik Geuss, Deputy Minister for Industry and Trade of the Czech Republic
- Gwenole Cozigou, Director of the Directorate 8, DG Enterprise and Industry, European Commission
- Miroslav Ouzký, Member of the European Parliament and Chairman of the ENVI Committee
- Pavel Švarc, President of the Association of Chemical Industry in the Czech Republic and member of the CEFIC Board of directors

11:15 – 11:30 Coffee Break (Press conference)

Panel 1: Innovation as a key driver for competitiveness of the Chemical Industry in Europe

Moderator: Andrea Tilche, DG Research

- Novel materials and technologies – the future role of the SusChem Technology Platform for the chemical industry in Europe
Gernot Klotz, Executive Director Research and Innovation CEFIC
- Open Innovation in European Chemical Regions
Frank van Lissum, Province of Limburg

12:30 - 14:00 Buffet Lunch

Panel 2: Natural Resources, Energy and Feedstock for the Chemical Industry in Europe

Moderator: Ladislav Novák, Director of the Association of Chemical Industry in the Czech Republic

- The chemical industry as an energy intensive sector in Europe – responses of the chemical regions
Massimo Buscemi, Councillor of the Region Lombardia
- Global trends in chemical industry

René van Sloten, Executive Director International Trade & Competitiveness, CEFIC

- Energy and Climate change as an opportunity for the chemical industry in Europe

Mikael Karlsson, President of the European Environmental Bureau

- The future role of renewable raw-materials – chance and challenge for the chemical regions

Martin Kubů, General Director of PREOL a.s. Lovosice

15:30 - 16:00 Coffee Break

Panel 3: Proximity matters – the regional dimension of the chemical industry in Europe

Moderator: Karl-Uwe Büttof, Head of Department Ministry for Economics of North Rhine-Westphalia and ECRN Vice-President

- Social Partnership in European chemical regions
Reinhard Reibsch, General Secretary of the European Mine and Energy Workers' Federation

- Plant safety in chemical regions
František Hrobský, Head of Safety and Health Protection Department, HSE&Q Division, UNIPETROL SERVICES, s.r.o. and Chairman of the Labour protection Committee, Association of Industry and Transport CZ

- Supply chain management and logistics
Wolfgang Schnabel, Supply Chain Manager, DOW

17:30 - 18:00 **Conclusion Day One:**

- Oldřich Macák, Advisor to the Deputy Minister for Industry and Trade of the Czech Republic

19:30 **Gala dinner**

- Welcome Address: Alain Perroy, General Secretary of CEFIC
- Key note speech: Oldřich Vlasák, Member of the European Parliament and Chairman of the Association of Cities and Municipalities of the Czech Republic

17th April Delivery on the Ground – implementing the High Level Group Recommendations in chemical regions

9:00 Re-Opening

Michael Hack, Director of the ECRN Office in Brussels

Workshop 1: Chemical Logistics and Cluster Development focussing on Infrastructure and Intermodal Transport

Moderator: Gunthard Bratzke, isw Institute

Speakers:

- Hannelore Hofmann-Prokopczyk, University of Applied Science Upper Austria
- Judit Thomka, Regional Development Holding
- Marcello Miani, Province Novara
- Wojciech Lubiewa Wielezynski, Polish Chamber of Chemical Industry

Workshop 2: Strengthening Innovation in chemical clusters

Moderator: Michael Hack, ECRN

Speakers:

- Andrea Tilche, DG Research,
- Theo Hommels and Dries Lodewijks, LIOF
- Philippe Le Thuaut, AXELERA
- Dr. Gernot Klotz, CEFIC
- Thomas Wobben, Saxony-Anhalt

Workshop 3: Implementing REACH in the regions

Moderator: Hanny Nover, Ministry of Economics North Rhine-Westphalia

Speakers:

- Jan Kolář, National Helpdesk Czech Republic
- Jean-Pierre Feytaerts, National Helpdesk Belgium
- Tine Cattoor, essenscia,
- Alejandra Sánchez, LEITAT

12:00 Final Session

- Karl-Uwe Bütof, Head of Department in the Ministry for Economics of North Rhine-Westphalia and ECRN Vice-President
- Klaus Berend, Head of the Chemicals Unit, DG Enterprise and Industry, European Commission
- Arno Fišera, Deputy Governor of the Ústí Region

12:30 Final Lunch and Opening of the exhibition Fabrica Bohemica

Annex 2: ECRN Ústí Declaration



A Competitiveness Agenda for a Sustainable Chemical Industry in Europe

Implementing the HLG recommendations with the Chemical Regions in Europe

On February 19th 2009 the High Level Group on the Competitiveness of the Chemical Industry in Europe presented its final report containing a total of 39 recommendations. The document was unanimously agreed by all participants and provides a thorough analysis of the current situation and future challenges of the chemical industry in Europe, particularly in the following fields:

- Innovation, Research and skills development
- Energy and Climate
- Logistics and Feedstock and
- Trade matters.

It is now up to the European Union Institutions, the Member States and the chemical regions together with the chemical industry and other stakeholders to take up these recommendations and to transfer them into concrete actions.

The European Chemical Regions Network together with Ústí Region, have therefore taken the initiative of organising a first Follow-Up Conference to the High Level group; a proposal which has been supported by the Directorate General for Industry of the European Commission and by the Czech Presidency of the European Union.

On the basis of the recommendations of the High Level Group, the **European Chemical Regions Network** ...

General Positions

- urges all stakeholders involved in the High Level Group process to do their utmost to start with the immediate implementation of the 39 recommendations of the High Level Group,
- underlines the role of the HLG recommendations in providing important longer term orientations - which can also guide shorter term actions - taken as part of the European Economic Recovery Plan to address the current economic crisis,
- sees in the follow-up conference in Ústí nad Labem a good start for a multi-stakeholder and multi-level follow up process of the HLG recommendations and reiterates its interest in carrying out further follow-up events to the HLG,
- welcomes the support given by the European Commission and the Czech presidency to actively involve the chemical regions in the stakeholder dialogue at European level,
- supports the Czech Presidency of the EU in putting the recommendations of the HLG on the agenda of the Competitiveness Council in May this year,
- hopes that the incoming Spanish and Belgian EU Presidencies in 2010 will devote specific attention to the follow-up process,
- calls upon the European Commission to be open to any further suggestions to develop a follow-up mechanism with clear implementation targets,
- announces its ambition to actively engage the newly elected European Parliament in the follow-up process of the HLG implementation,
- underlines the specific role of chemical regions in delivering the HLG recommendations on the ground as outlined in certain concrete examples in the annex of this declaration,
- sees in the recommendation of the High Level Group a **Competitiveness Agenda for a sustainable chemical industry in Europe** for the years to come,

Innovation and Research

- welcomes the recommendations made by the HLG on extending the SusChem Technology platform towards innovation and underlines the role of the chemical regions in supporting innovation processes on the ground,
- sees in this extension of the SusChem Technology platform a possibility to widen the scope of the co-operation towards SME in the chemical sector,
- confirms the commitment of the ECRN to take an active part in the further development of SusChem and other initiatives to foster the co-operation of research providers and the chemical industry,

- supports the idea of “flagship projects” to signal the potential of certain innovations and to set up innovation networks to promote key strategic innovations,
- underlines the importance of strengthening innovation in chemical clusters and promoting open innovation processes and an innovation culture, particularly within and between chemical regions,
- underlines the importance of transforming chemical parks into “knowledge sites” for the combination of production location with knowledge generation in order to increase the innovation capacity and the rate of innovation,
- sees in the networking of chemical regions an important contribution to the exchange of best-practice solutions in the areas of open innovation, chemical park development as knowledge sites and skills foresight analysis, which can contribute to improving innovation capacity in European Chemical Clusters,
- calls upon the private sector to increase their efforts for a higher rate of innovation and to underline the role of chemical regions to support the innovation process by providing financial instruments such as support and risk cover for start-ups and other SMEs,
- suggests an increase in tax credits for innovation and underlines the need to make more funding available to increase innovation collaboration between academia and industry.
- underlines the role of chemical regions in the stakeholder dialogue to build trust and improve communication at local and regional level,
- stresses the fact that encouragement is needed for companies to be able to refocus from short-term financial concerns to long term innovation. Less complex and less expensive means of protecting processes and products need to be developed, particularly for SMEs.

Regulation

- supports the recommendation of the High Level Group that a proper consultation of stakeholders and an improved communication by authorities as well as more harmonised and correct application of rules are key elements of a good regulatory framework,
- in view of the current economic climate suggests that the Commission ensure that all relevant considerations are addressed in terms of impact assessment before any new legislative proposals are put forward,
- underlines the finding of the High Level Group that regional authorities can play a crucial role in the process of communicating full and accurate information following the adoption of new legislation,
- reiterates the request of the High Level Group that regulation should form a consistent framework and provide a reasonably stable long term perspective,

Human resources

- underlines the key role of the chemical regions in implementing the findings of the High Level Group to step up the promotion of chemical and science education and more acceptance of innovations, starting with primary schools in order to forge links between schools and colleges and the industry,
- supports the need of the chemistry or/and chemical engineering faculties to define the profiles of new professions in cooperation with industry,
- identifies the need for closer co-operation between industry, education, employment agencies and regional actors to intensify efforts to assess human resource requirements in the short and long term and to identify probable changes in skill profiles,
- stresses the need to apply transition measures such as temporary workers allowances for employees in the chemical industry, which are facing unemployment in the face of the current global financial and economic crisis and to use these measures for further education and training and to keep qualified employees in the regions and the enterprises,
- calls for measures to provide funding to retain highly skilled workers during temporary shutdowns and to upskill the current workforce

Energy and feedstock

- underlines the fact that energy and feedstock are decisive elements of competitiveness of the chemical industry,
- suggests that some EU Member States provide additional gas storage facilities, to improve the capacity to buy and store when prices are cheaper,
- underlines the fact that greater reductions of waste and increased recycling need to be reached in generation and use. These could be achieved by facilitating the exchange of best practice and through increased innovation,
- points out that further investigation is needed into industrial biotechnology as a source of platform chemicals,
- sees in the high integration of chemical clusters and infrastructure a central competitive advantage of the European Chemical industry,
- supports the findings of the HLG to improve the chemical infrastructure based on an improved performance of an effectively liberalised gas market, at least in the Community, and securing reliable imports of gas at competitive non-distorted prices,
- states that due to the long term nature of the high investments required and the need to achieve high capacity utilisation, stable long term electricity supply is a key element of competitiveness for important parts of the chemicals industry.

- highlights that at present, it is too early to make a robust assessment of the economic viability of renewable feedstock in the chemicals industry as a replacement for fossil feedstock, but the expected significant potential available in the longer term provides sufficient justification to continue research and industrial development activities as a priority,
- sees the importance of updating the energy tax regulation, which should not lead to increasing costs for energy intensive industry such as the chemical industry,

Climate change policy

- emphasises that action on climate change provides significant business opportunities for the European chemicals industry,
- reiterates the finding of the HLG that in a globalised chemicals industry, global action including an adequate engagement of emerging economies is essential to combat climate change,
- supports the finding that Europe's chemicals industry has made much progress in reducing energy intensity and emissions, but further efforts are necessary,
- underlines that further promotion and support is needed to assist companies to implement energy efficiency projects and to investigate and, where appropriate, develop on-site renewable energy production,
- suggests the realisation and further development of heat distribution networks especially outside the borders of the chemical sites in order to reuse heat most efficiently,
- stresses the importance of avoiding carbon leakage to ensure the competitiveness of the European chemical industry in the global market. The competitiveness of energy intensive production is mainly determined by the form of the benchmarking process, the free allocation of emission certificates or the compensation of increasing electricity prices caused by full auctioning and low electricity prices offered by fully functioning electricity markets.
- supports the demand that robust and verifiable information on emissions and the emission reduction potential of the chemicals industry is crucial for decisions on measures to mitigate climate change and to set benchmarks for the future implementation of the European Emissions Trading Scheme. Closure of the current information gap is of the utmost priority,
- points out that careful consideration should be given to regulatory changes, including carbon management, to ensure that EU competitiveness is not lessened compared to other global producers,

Logistics

- sees in strong chemical clusters a key asset of the European chemical industry,

- stresses that with the ChemLog Project the ECRN can contribute to improving chemical logistics, particularly in Central and Eastern Europe,
- underlines the role of chemical regions in the development of local cluster platforms to improve logistical efficiency and overall management. A multi-stakeholder approach to cluster leadership can enable the development of long term perspectives and guarantee consistency,
- supports the findings of the HLG that numerous bottlenecks in transport must be a priority for a further integration of European chemical production sites into clusters with better infrastructure along the value chain,
- highlights the fact that massive congestion of the road network is a major problem for chemical logistics and the Commission's work in investigating solutions to the problem is strongly supported,
- highlights the essential need for increased rail links and connectivity between chemical companies and ports as well as increased expenditure to relieve road congestion around chemical parks\clusters ,
- underlines the interest of the chemical regions to close gaps in the olefin pipeline network and reiterates its commitment to cooperate with other stakeholders with regard to the Commission's 2nd Strategic Energy Review, which should provide clarification on the way ahead,

Globalisation, international competitiveness and trade

- supports the findings of the HLG that notwithstanding the difficulties in reaching agreement in the framework of the WTO trade negotiations, the multilateral approach towards trade liberalisation, currently being pursued through the DDA negotiations, remains the preferred option and
- underlines the need for fair market conditions ensuring that trade distorting practices, such as double pricing policies for energy and feedstock by acceding countries are effectively addressed.
- calls for the provision of affordable credit insurance to facilitate ongoing trade particularly during the current economic crisis.
- stresses the need to rigidly enforce intellectual property rights to ensure innovation is allowed to flourish in all parts of the world;
- urges the EU to continue to support developing countries in the uptake of measures to protect human and environmental health.

The **European Chemical Regions Network** will continue its efforts as an active stakeholder at the European level aiming at a **Competitiveness Agenda for a sustainable chemical industry in Europe**.

Ústí nad Labem, 16th of April 2009

Annex: Current Actions of Chemical Regions following the HLG-recommendations

Innovation & Research

- Knowledge Transfer Networks. Chemistry Innovation is a publicly funded Knowledge Transfer Network (KTN) set up in 2006 to drive innovation performance across the UK chemistry-using industries. They facilitate innovation and knowledge transfer by providing networking opportunities that help to connect companies, universities, funding bodies, national, regional and devolved administrations and enable them to focus on a common agenda. http://innovation.globalwatchonline.com/epicentric_portal/site/Innovation/?mode=0
- Innovation Vouchers scheme in North West England to enable companies to fund R & D from universities, colleges or private sector establishments. <http://www.nwda.co.uk/news-events/press-releases/200801/4m-innovation-vouchers-scheme.aspx>
- R & D Tax credits – a UK government scheme. <http://www.hmrc.gov.uk/randd/>
- R & D grants for SMEs – via Business Link North West
http://www.businesslink.gov.uk/bdotg/action/home?site=102&furlname=northwest&furlparam=northwest&ref=http%3A/www.google.co.uk/search%3Fsourceid%3Dnavclient%26ie%3DUTF-8%26rlz%3D1T4RNWN_enBE267BE267%26q%3Dbusiness%2Clink%2Cnorth%2Cwest&domain=www.businesslink.gov.uk
- Knowledge 2 Innovate (K2i) – North West Development Agency funded initiative to provide free specialist advice and practical support to SMEs to implement innovation. <http://www.k2i.org.uk/home/>
- Knowledge Transfer Partnerships – funding to help place a graduate in industry to help deliver a new product, process or service. <http://www.ktponline.org.uk/>
- Technology Strategy Board and Research Councils – provide grants for UK R & D. <http://www.innovateuk.org/>
- The province of Limburg strives to increase the innovation capacity and the rate of innovation. To increase this innovation capacity we have developed several innovation instruments with several regional and national partners. These instruments are focused upon our three so called Powerclusters. One of these powerclusters is called Energy & Chematerials.

The main topic within Chematerials is our open innovation campus Chemelot. The ambition of Chemelot (with main partner DSM): A globally recognized Chematerials valley offering accelerated business growth for all parties involved.

Over the past year Limburg has invested € 5 mln in our Chematerialscluster/campus and this is only the beginning. The main targets for these investments are open innovation, performance materials, life sciences (biomaterials) and white biotech. This shows that the Province of Limburg and their main partners like DSM, Sabic and the University of Maastricht are willing to invest in the future of the Chemical sector. The aim is to have 1000 more knowledge workers (50 more companies) within 2018.

Therefore the province supports the Interreg IV C project ChemClust (Improving innovation capacity in European chemical Clusters) as an active partner.

- The region North Rhine-Westphalia has started with a new cluster strategy in different fields related to chemistry, these are polymers, new material, nanomaterial and automo-

tive. Clusters take over bridge functions: They strengthen science activities as well as qualifications, they provide transparency and activate the transfer into the economy. Professional press and dissemination activities are supporting a positive perception outside and inside the expert communities

- A partnership of 10 chemical regions from Saxony-Anhalt, North-Rhine Westphalia, Schleswig-Holstein, Asturias, Masovia, Estonia, Cheshire, Tees Valley and Limburg have developed the ChemClust project “Improving Innovation Capacity of European Chemical Clusters” in the framework of the Interreg IVC programme. The project wants to exchange best practice solutions and implement three pilot projects on “Open Innovation in chemical Clusters”; “Chemical Parks as Knowledge Sites” and “Skills Foresight for the Chemical Industry”. After a successful evaluation the project could start in October 2009.
- The Network of Chemical Parks in Central Germany CeChemNet has started an initiative to develop an innovation location network. Each chemical site has identified its innovation potential in view of the further development of the park and attraction of new investors. This process is supported by the settlement of research and development institutions on the sites to improve cooperation between the enterprises (with special focus on SME) and the science.
- The Fraunhofer Institute for Mechanics of Material Halle, Polykum e.V.; Clustermanagement Chemistry / Plastics Central Germany and the Ministry for Economy and Labour Saxony-Anhalt have started a technology roadmap process to identify future innovation needs of chemical enterprises. The road map should be used to develop conclusions for the regional technology and innovation policy in order to improve innovation orientation of especially SME.

Regulation

- Responsible Care Cells network – European wide, but run by Chemical Industry Association in the UK and hosted by Chemicals North West <http://www.chemicalsnorthwest.org.uk/main/homepage.asp?sectionid=1>
The networks are a forum for Health and Safety Executive Managers from the chemical sector to meet on a regional basis to share best practice, learn from experience, be informed about forthcoming legislation and its implications, and to discuss issues and problems.
- REACH networks and assistance is available in various regions. The North West of England secured North West Development Agency funding for a support programme for companies in all affected sectors and plan to start up an ongoing REACH network group once the programme finishes at the end of March.
- REACH webinars and REACH-NET provided by North-Rhine Westphalia

Human Resources

- Schools programmes – Chemicals Northwest primary programme (Children Challenging Industry), Chemicals Northwest secondary programme (Collaboration of schools and Industry), Catalyst Science and Discovery Centre and other national programmes via the learned societies (e.g. RSC, IChemE). <http://www.chemicalsnorthwest.org.uk/main/homepage.asp?sectionid=1>
- National Department for Innovation, Universities and Skills led Science and Society Consultation exercise – lots of recommendations resulted from the consultation for enhancing the reputation of science and science education.

http://74.125.77.132/search?q=cache:bDRFDMmlm98J:www.dius.gov.uk/consultations/documents/A_Vision_for_Science_and_Society.pdf+%E2%80%A2+National+Department+for+Innovation,+Universities+and+Skills+led+Science+and+Society+Consultation+exercise&cd=1&hl=en&ct=clnk&gl=uk

Logistics

- In the ChemLog Project “Chemical Logistics Cooperation in Central and Eastern Europe”, 10 partners from Germany, Poland, Czech Republic, Slovakia, Austria, Italy and Hungary are cooperating to improve framework conditions for chemical logistics in Central and Eastern Europe. The idea of the project has been developed and discussed in the HLG and has received the clear support of the members of the HLG. The Chem-Log project is a practical example for the implementation of HLG recommendations in the European chemical regions. The project should actively contribute to the strengthening of competitiveness of the Central and Eastern European chemical industry. The partners have the objective to intensively cooperate with the European Institutions and relevant interest organisations for the development of a sustainable Central and Eastern European Feedstock Network.

Annex 3: Abstracts and Presentations

The Abstracts and Presentations of the following speakers are on the CD-ROM attached to this report:

Opening : **The opportunities and challenges of the European Chemical Industry in light of the findings of the HLG**

- [Gwenole Cozigou](#), Director of the Directorate 8, DG Enterprise and Industry, European Commission
- [Pavel Svarc](#), President of the Association of Chemical Industry in the Czech Republic and member of the CEFIC Board of directors
- [Miroslav Ouzký](#), Member of the European Parliament and Chairman of the EU Environment Committee

Panel 1: **Innovation as a key driver for competitiveness of the Chemical Industry in Europe**

- Novel materials and technologies – the future role of the SusChem Technology Platform for the chemical industry in Europe
[Gernot Klotz](#), Executive Director Research and Innovation CEFIC
- Open Innovation in European Chemical Regions
[Frank van Lissum](#), Province of Limburg

Panel 2: **Natural Resources, Energy and Feedstock for the Chemical Industry in Europe**

- The chemical industry as an energy intensive sector in Europe – responses of the chemical regions
[Massimo Buscemi](#), Councillor of the Region Lombardia
- Global trends in chemical Industry
[René van Sloten](#), Executive Director International Trade & Competitiveness, CEFIC
- Energy and Climate change as an opportunity for the chemical industry in Europe
[Mikael Karlsson](#), President of the European Environmental Bureau
- The future role of renewable raw-materials – chance and challenge for the chemical regions
[Martin Kubů](#), General Director of PREOL a.s. Lovosice

Panel 3: **Proximity matters – the regional dimension of the chemical industry in Europe**

- Social Partnership in European chemical regions
[Reinhard Reibsch](#), General Secretary of the European Mine and Energy Workers' Federation
- Plant safety in chemical regions
[František Hrobský](#), Head of Safety and Health Protection Department, HSE&Q Division, UNIPETROL SERVICES, s.r.o. and Chairman of the Labour protection Committee, Association of Industry and Transport CZ
- Supply chain management and logistics

[Wolfgang Schnabel](#), Supply Chain Manager, DOW

Workshop 1: Chemical Logistics and Cluster Development focussing on Infrastructure and Intermodal Transport

- [Hannelore Hofmann-Prokopczyk and Friedrich Starkl](#), University of Applied Science Upper Austria
- [Judith Thomka](#), Regional Development Holding
- [Wojciech Lubiewa Wielezynski](#), Polish Chamber of Chemical Industry
- [Marcello Miani](#), Provincia di Novara

Workshop 2: Strengthening Innovation in chemical clusters

- [Andrea Tilche](#), DG Research,
- Theo Hommels and [Dries Lodewijks](#), LIOF
- [Philippe Le Thuaut](#), AXELERA
- Dr. [Gernot Klotz](#), CEFIC
- [Thomas Wobben](#), Saxony-Anhalt

Workshop 3: Implementing REACH in the regions

- [Jan Kolář](#), National Helpdesks, Czech Republic
- [Jean-Pierre Feyaerts](#), National Helpdesk Belgium
- [Tine Cattoor](#), essenscia,
- [Alejandra Sánchez](#), LEITAT

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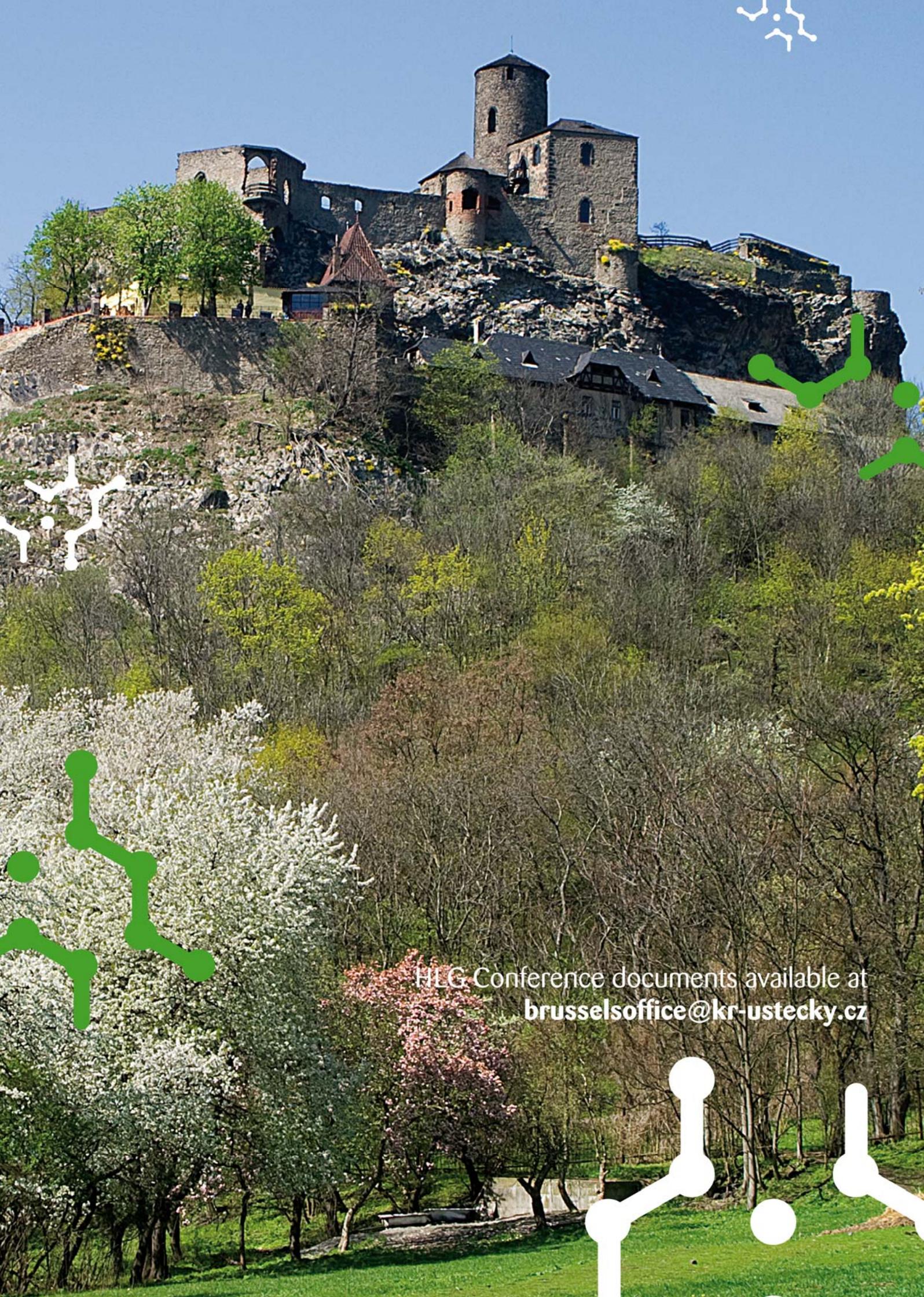
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