



# Board Europe

A newsletter for members of *The Conference Board in Europe*

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## Shifting Europe's Waste Burden

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Attitudes to waste are changing in Europe as new legislation forces a range of industries to rethink how their products are designed and made, what they contain and how they are disposed of.

The most immediate effects will be felt in the automotive, electrical and electronics, and packaging industries, but Europe-wide plans for greater resources efficiency – to be revealed this year – will eventually leave few sectors untouched. In future, producers will have to be more responsible for the environmental impact of their products throughout the products' life-cycle. Theoretically, this will lead to more eco-friendly products that use fewer resources and generate less waste, especially hazardous waste. In practice, the outcome of life-cycle thinking, which is complex, is unclear.

To discuss some of the issues involved and experiences to date, in particular in waste prevention and waste handling, The Conference Board Europe organised its **11<sup>th</sup> Annual Environment Forum** in Brussels on 16 January. The event was hosted by Hewlett-Packard. (> 2)



# Shifting Europe's



1 David Grant Lawrence, Director, Sustainable Development and Policy Support, DG Environment, European Commission

## Working with Economic Growth, not against it

David Grant Lawrence, Director, Sustainable Development and Policy Support, DG Environment, European Commission, looked at the structure of European waste management policy as it stands today. The *Sixth Environmental Action Programme* works towards a wider vision of waste and the sustainable use of natural resources. DG Environment is committed to the economic and employment targets of the Lisbon Council and aims to work *with* growth not against it.

In the European Union (EU) and elsewhere, *extended producer responsibility* (EPR) is becoming an increasingly popular tool among policy makers for achieving environmental objectives. The idea is to expand producers' responsibility – financial and/or physical – for their products to the post-consumer phase of the product's life.

Three EU initiatives – the *Waste Electrical and Electronic Equipment (WEEE) Directive*, the *End-of-Life Vehicles (ELV) Directive* and amendments to the *Packaging and Packaging Waste Directive* – demonstrate how EPR is being used in the region to shift the costs and burden of product disposal to producers and, in time, to restrict the use of certain substances in the making of these products. Since the EU's definition of producers includes manufacturers, resellers and importers of products, the implications of these directives are far-reaching.

## Looking at all Phases of a Product's Life-Cycle

Looking ahead, producers in the EU will also be affected by proposals for an *Integrated Product Policy (IPP)*, more on which will be published by the European Commission later this year. IPP seeks to minimise the environmental impact of products by looking at all phases of a

product's life-cycle and taking action where it is most effective. This could include incentives to move to products which have lower aggregated environmental impacts.

## Recycling Cars

The *End-of-Life Vehicles (ELV) Directive* is already in force and requires producers, rather than owners, to meet all or a significant part of the costs of taking back and recycling end-of-life vehicles (passenger cars and light commercial vehicles). Implicit in the legislation is a need for producers to design and manufacture new vehicles with a view to their recyclability.



3 Philip Frey, Center of Competence Recycling Processes Sales, DaimlerChrysler

In general, European car manufacturers have welcomed the EU's pursuit of more environmentally-friendly vehicle dismantling and recycling. DaimlerChrysler tries to look on the positive side and points to the commercial opportunities that will arise from the Directive. "We will have a chance to get in touch with lost customers," says Philip Frey of DaimlerChrysler's Centre of Competence for Recycling Processes.

DaimlerChrysler is adopting a two-phase approach to comply with the ELV Directive; It is also planning to use its own recycling system – already in operation at a centre in



2 Marina Franke, Global Technical Policy, Environmental Management Procter & Gamble Services GmbH and on the right: Laetitia Reynaud, Policy Executive, FEAD

# Waste Burden

Stuttgart, Germany, for dismantling Mercedes vehicles – on a much larger scale. The company expects its technology to be used in facilities throughout Europe for a variety of vehicle brands, including Smart, Chrysler and Mitsubishi as well as Mercedes. Ultimately, an EU-wide network of dismantling facilities is envisaged, part of which is likely to be operated in cooperation with other vehicle producers.

## Electrical and Electronic Equipment

The *Waste Electrical and Electronic Equipment (WEEE) Directive* requires producers, or third parties acting on their behalf, to be responsible for taking back and recycling electrical and electronic equipment. It will shortly come into effect and includes an associated directive – *Restriction of Hazardous Substances (ROHS)* – that will harmonise substance bans in electrical and electronic equipment in the EU.

Hewlett-Packard (HP), which is one of the three biggest IT companies most affected by the Directive, already has 15 years of experience of product take-back but only with its big customers. “Take-back is almost a mandatory requirement to win major orders in our business,”



4 Michelle O'Neil, EU Environmental Affairs Manager, Government Public Affairs EMEA, Hewlett-Packard

says Michelle O'Neil, HP's EU environment affairs manager. “It is not only an environmental issue but also a business issue.”

In view of the incoming EU legislation, one of HP's priorities is to design future products for ease of assembly and disassembly. The company is also investigating the possible use of biodegradable plastics in its products. “We want design for the environment to become a competitive aspect of our business,” says O'Neil, and not just in Europe but worldwide.

That said, HP admits that it will be a challenge meeting the WEEE Directive and is now talking to national governments about what makes effective take-back systems and the need for some consistency in applying them across member states. It is also concerned about the Directive's waste treatment requirements which are now under review.

## Packaging: Has Recycling Gone Too Far?

Packaging has been the subject of comprehensive EU waste regulation for almost a decade and proposals for more stringent legislation are now under discussion. Yet one industry body, the Industry Council for Packaging and the Environment (INCPEN), argues that it is the least appropriate item for take-back and for three main reasons:

- packaging waste consists of a wide range of different materials of low weight and low financial value;
- it is not hazardous; and
- the trend in the industry is towards resource-efficient packaging design using lighter weight and mixed materials.

INCPEN would like to see more focus on overall resource-efficiency rather than on waste and recycling. It would also prefer packaging waste to be regulated at a local level in future. “Regardless of packaging waste recycling initiatives, household waste continues to grow in the



5 Jane Bickerstaffe, Director, INCPEN

EU, and the biggest influence is the decreasing number of people per household,” insists Jane Bickerstaffe, a director of INCPEN. In her view, the Packaging Waste Directive concentrates primarily on recycling and fails to take into account other factors such as energy and transport costs, and trade-offs between used packaging and product waste. “The Directive pushes the market in the direction of more easy-to-recycle containers,” says Bickerstaffe. “But design for recycling can produce more waste and use more energy.” She believes the obsession with recycling is going too far, but her view was hotly contended by Roberto Ferrigno, EU Policy Director, European Environment Bureau, who pointed to the huge volume, rather than weight, of packaging materials and the fact that many consumer products are over-packaged. ●

*The full report of this Environment Forum is available on the “Members Only” website under “Publications” and the Executive Action series.*



1. Over 200 people gathered at the Paris Chamber of Commerce on 21 January for the Conference Board briefing on the US political and economic outlook.



2. Speakers' platform left to right: Jean Peyrelevade, Chairman of Crédit Lyonnais; Jack Wirts, Executive Vice President, The Conference Board; Pierre Simon, Vice-President and Treasurer, CCIP; Gail Fosler, Senior Vice President and Chief Economist, The Conference Board.



# European Business Briefings 2003



5. "The Economics of Doing Business in the Global Economy" was the title of Gail Fosler's presentation to Dutch executives invited by ABN AMRO Bank.

The annual series of Conference Board briefings on the US economic and political scene took place towards the end of January, against a background of uncertainty over a possible war with Iraq. The Conference Board's Senior Vice President and Chief Economist gave briefings to invited audiences of business leaders in Amsterdam, Paris, Zurich and Frankfurt. Hosting these events were ABN AMRO Bank, the Paris Chamber of Commerce and Industry, Zurich Financial Services Group, and Commerzbank.

For the annual briefing to the Paris Chamber of Commerce and Industry (CCIP) on 21 January, Gail was joined on the speakers' platform by Jack Wirts, Executive Vice President, The Conference Board, Pierre Simon, Vice-President and Treasurer, CCIP, and Jean Peyrelevade, Chairman of Crédit Lyonnais. The invited audience of over 200 people included senior civil servants, academics and executives.

## "Demographics are beginning to look like Destiny"

Jack Wirts spoke about the demographic changes that are taking place in the United States and the rest of the world, and pointed to their economic and political impact. "Many Western countries are having to face the reality of their ageing and demanding societies. This unfortunate mix of factors will generate widespread political chaos unless something changes. We must begin to see reductions in the level of social commitments or significantly more open immigration policies. However, since the essence of the soul of all politicians is survival or re-election, don't expect politicians to lead the charge to cut social spending programmes."

Around the world, demographics are proving to be far more than just fodder for economists, politicians and corporate marketing departments. "For the US, and most western nations as well, demographics are beginning to look like destiny."



3. François Cornelis, Vice Chairman of the Executive Committee and Executive Vice President, TotalFinaElf (right) in conversation with Malcolm Brooks (centre), Managing Director, The Conference Board Europe, and Jack Wirts, Executive Vice President, The Conference Board. Mr Cornelis is a Global Counsellor of The Conference Board.

4. Gail Fosler exchanging views with Jean Peyrelevede, Chairman of Crédit Lyonnais.

### Has the Dollar Peak Come and Gone?

Gail Fosler expressed her belief that dollar strength would resume but that the system was unstable: threats to individual security could have a dramatic negative effect on consumer confidence and the economy. She downplayed the notion of a major oil price shock, saying that much of the focus on oil is too narrow in scope and too concentrated in time. "Oil is not likely to be the instrument of

economic disruption and even if oil prices fall, everything will not return to normal when they decline."

The Paris briefing traditionally takes the form of a structured debate. Jean Peyrelevede, Chairman of Crédit Lyonnais, said he "disagreed fundamentally" with Gail's optimistic forecast vis-à-vis the dollar and believed that the currency has already entered a period of continued weakness. ●



6 Gail Fosler, Senior Vice President and Chief Economist, The Conference Board, with Rijkman Groenink, Chairman of the Managing Board, ABN AMRO Bank, Trustee and Global Counsellor, The Conference Board



7 Participants at the Amsterdam briefing, organised by the Dutch Management Association, NIVE, and hosted by ABN AMRO Bank.

## The Impact of E-nabling

The most successful marketing departments are turning more frequently to the Internet to boost sales and find new customers for their products and services as market life-cycles shorten. According to a new Conference Board report, *Beyond the Hype: E-nabling the Sales and Marketing Force*, the introduction of new technologies in the past five years has had a bigger impact on the organisation and processes of marketing departments than on sales departments. This is largely because of the greater centralisation of the marketing function and the greater independence of the sales organisation.

The new word for what is happening is "E-nabling" – the implementation of digital and communication technologies such as the Internet, Intranet, and Worldwide Web to improve business performance and allow the organisation to operate in real time. E-nabling has increased the speed of communication within companies and between their markets and has flattened organisations.

"Firms citing success in e-nabling are those that are close to their customers," says Thomas Bodenber, author of the report and founder of The Conference Board's US Council on Corporate Brand Management. "They are able to anticipate changes in their customers' operations and processes so as to mirror those processes in their own firms." ●



*Beyond the Hype: E-nabling the Sales and Marketing Force*

REPORT 1325-02-RR

# Council News

## Corporate Learning



1 Members of the European Council on Corporate Learning enjoying a session at the ESADE Business School in Madrid.

The ESADE Business School in Madrid was host to the members of the **European Council on Corporate Learning, Management Education and Training** when they met in Madrid on 16-17 January.

The business school's Dean, Dr Xavier Mendosa Mayordomo, said that corporate social responsibility (CSR) was an important research area for ESADE. He stressed that CSR is not about new ways of doing business but of getting to the core of what business is about, and this is a learning/education process. In a session on defining an overall framework of learning, Dr Mendosa Mayordomo showed how management learning has emerged from the traditional classroom mode into something that is much more flexible, customised and relevant to the work-place, combining on-line and face-to-face methods.

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## Investor Relations

On 16 and 17 January, the **European Council on Investor Relations** met in Heerlen/Maastricht. Dries Ausems, DSM's IR Director, hosted the group at the company's headquarters in Heerlen, and arranged for a guided, walking tour of Maastricht, a delightful and historic city.

Henk van Dalen, DSM's CFO, welcomed the group, then explained DSM's view on investor relations. "Within the company," he said, "the IRO should uncover hidden golden eggs, then crow about them to the market". DSM takes a three-prong approach to IR: strategy, results, culture/systems. For strategy, it aims to position the company in the future industry without citing specific target dates or entertaining "what ifs". For results, it delivers quarterly outlook statements on future earnings. It also provides proactive communications on culture, systems and corporate governance. DSM follows several style principles: transparency, consistency, realism and predictability.

The next meetings of the European Council on Investor Relations will be held on 2-3 June in Helsinki, and on 2-3 October in Barcelona.

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3 Members of the European Council on Investor Relations gathered at DSM's headquarters in Heerlen, The Netherlands

## CEO Breakfast in Warsaw

Members of the **Polish Chief Executive Council** and guests attended a special *New Year's Breakfast* on 9 January in Warsaw. This was the second annual event of this kind. Participants numbered over 80 senior executives including 30 CEOs from top companies operating in Poland.

The discussion topics were corporate reputation and social responsibility, key issues for businesses that are currently faced with the challenge of transforming an economy affected by lower growth and high unemployment rates. The keynote address was given by Prof. Andrzej Szostek,



2 Prof. Andrzej Szostek, President of The Catholic University of Lublin.

President of The Catholic University of Lublin, a reputable philosopher and an expert on ethics. He started his academic career as an assistant to Cardinal Karol Wojtyla, who later became Pope John Paul II.

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## The Value Chain Network

Councils in The Conference Board's Value Chain network are for companies seeking to improve efficiency at every stage of their Value Chain – from research, through production and distribution, to final delivery to the customer. Six interlinking Councils make up this network. Find out all about them at: [www.conference-board.org/value-chainnetwork.cfm](http://www.conference-board.org/value-chainnetwork.cfm)

## Plant Managers

A new **European Council for Plant Managers**, part of the Value Chain network, will be launched on 12-13 June in Germany. Its mission is, through the sharing of competitively non-sensitive experiences and ideas, to help members achieve functional excellence in the conversion of raw and intermediate materials into finished products.

The pre-launch planning meeting took place on 30-31 January. A highlight was the visit to the huge Opel Astra Plant (over 5000 employees) in the port of Antwerp, focusing on the organisational transformation Opel has achieved in this plant since 1996. The company has shown a very successful adaptation of the Japanese lean manufacturing model for building quality into cars. Six years into this programme, the plant has received the GM Chairman's honour award



4 Directing the European Council for Plant Managers is Gottfried Schmitt, formerly Vice President, Product Supply, Global Fabric & Home Care Engineering at Procter & Gamble. To find out more about this new group, contact him at: [carmgott@hotmail.com](mailto:carmgott@hotmail.com)



5 Members of the European Council on Transportation met in Windsor UK on 14 February.

three times and has become a model for a successful “brownfield to lean-field” transformation.

## Transportation

After a successful launch meeting in Brussels in December last year, the **European Council on Transportation** met in Windsor, UK, on 14 February. The topics covered two of the priority issues identified by the inaugural meeting of the council:

1. To have an understanding about the implications on the Working Time Directive (WTD) on European Transport operations and costs;
2. To understand new developments in technology supporting Proof of Delivery (PoD); and to discuss the benefits of outsourcing Freight Payments systems.

Koenraad Rogiers of Groep Essers spoke not only about the implications and potential constraints raised by the application of the new WTD regulations, but also underlined recognition of all those constraints on efficient operations which affect costs. He also stressed the vital central role of the transport planner rather than the systems. Members were reminded just how far we are from a “common transport market”, with different

tonnages allowed, weekend driving restrictions different, and social working hours different in many countries. The clear consensus was the now urgent need for improvements in end-to-end transport operational efficiency, particularly noting that less than 10% of commercial vehicles have digital communications capability.

Eric van den Bemdem of Transwide led the discussion on PoD systems and outsourced freight payment options. His company has developed a digital and web based server solution providing excellent interconnectivity to all users within a freight movement cycle, from shipper collection, through carriers and subcontractors to electronic proof of delivery documents. Eric's main message was that company accounts payable departments to not have the specialist staff, time or systems to manage freight payments effectively.

It was proposed that the next Council meeting address the issue of “Collaboration with Intermodal Operators - Issues and Opportunities, to take place at the Euro Terminal in Genk, Belgium, 8-9 May. For more details, contact: [mark.bedeman@conference-board.org](mailto:mark.bedeman@conference-board.org)

## Work-Life & Diversity



6 Members of the European Council on Work-Life and Diversity touring Lufthansa German Airlines' base at Frankfurt Airport.

Members of the **European Council on Work-Life and Diversity** met in Frankfurt on 30-31 January to discuss topics ranging from European legislation for disabled people, working actively with gay employees, the business impact of demographic change and a comparison of diversity legislation in European countries. Lufthansa German Airlines hosted the meeting and arranged an interesting tour of the company's base at Frankfurt Airport.

Dr Martin Schmitt, Lufthansa's Senior Vice President, HR Politics and Services, explained the meaning of diversity for Lufthansa, which employs people from 150 countries. Today, almost one quarter of all employees in Germany are older than 50, but 60% of all companies in Germany today have no employees over that age.

Dr Schmitt pointed to some of the actions that the company is taking (e.g. mentoring programmes, inter-cultural training, flexible working, back-up child care) to ensure the proper inclusion of all employees, whatever their age, gender, colour, sexual orientation or background.



7 Dr Martin Schmitt, Senior Vice President, HR Politics and Services, Lufthansa German Airlines, explaining what diversity means for his company.

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## Research, Development and Innovation

Computer modelling and simulation are fast becoming familiar fixtures in many companies, particularly R&D departments. Uses vary from trying to predict financial market behaviour, to car safety design, to accelerate testing of new drugs and cracking the DNA code. The topic was a prominent agenda item when members of the **European Council on Research, Development and Innovation** met in Zurich on 23-24 January. Dr Karl-Heinz Lepper of Opel talked about the application of computer simulation methods in Opel's virtual development process. These focus on areas such as crash safety, body structure, vehicle dynamics, fatigue and aerodynamics.

Givaudan, one of the oldest and largest flavours and fragrances houses in the world, hosted the second day of the meeting and organised a fascinating tour of its research centre, where fragrance and flavour compounds for a variety of products are created. ●



8 Members of the European Council on Research, Development and Innovation touring Givaudan's flavour and fragrance research centre in Dübendorf, Switzerland.

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# Meetings Diary

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Listed here are some forthcoming Conference Board events for European members.

If you would like to receive an invitation to any of them, please tick the appropriate box, supply your name and company details, and send the form to:

**The Conference Board Europe,  
130 Chaussée de La Hulpe, box 11,  
1000 Brussels, Belgium**

Alternatively, fax the form to  
**32.2/675 03 95**

You can view complete agendas for our conferences and register for them at our website:  
**www.conference-board.org**

Name \_\_\_\_\_

Position \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Tel. \_\_\_\_\_

Fax \_\_\_\_\_

e-mail \_\_\_\_\_

13-14 March

- European Council on Compensation & Benefits*  
Paris, France

24-25 March

- European Council on IT Governance and Strategy*  
Warsaw, Poland

26 March

- Productivity Research Briefing*  
Madrid, Spain

27-28 March

- European Council on Digital Solutions*  
Brussels, Belgium

2-3 April

- Citizenship, Governance & Risk Conference***  
*European Companies and Public Trust*  
Joint meeting with:
- *Polish Council of Finance Executives*
  - *Polish Council of Chief Executives*
  - *European Council on Corporate Governance and Board Effectiveness*
  - *European Council on Corporate Strategy (3-4 April)*
  - *European Research Working Group on Corporate Citizenship*
- Brussels, Belgium

10 April

- Polish Council of Marketing Executives*  
Warsaw, Poland

10-11 April

- European Council on Legal Affairs*  
Brussels

24-25 April

- European Council of Controllers*  
Paris, France

8-9 May

- European Council on Corporate Communications*  
Helsinki, Finland

- European Council on Research, Development and Innovation*  
Helsinki, Finland

- European Council on Transportation*  
Genk, Belgium

14-15 May

- European Council on Corporate Learning*  
London, UK

19-21 May

- European Council on Health & Safety*  
Joint meeting with  
*European Council on Managing the Environment*  
and *Councils of the Townley Global Management Centre for Environment, Health & Safety*

- European Council on Corporate Strategy*  
Wiesbaden, Germany

21-22 May

- Conference: Achieving High Performance Organisations Through Strategic Leadership***  
Joint meeting with:  
*European Council on Human Resources (22-23 May)*  
and *Polish Council of Human Resources Executives*  
London, UK

22-23 May

- European Council on Supply Chain*  
Ingolstadt, Germany

- European Council on Work-Life & Diversity*  
Gothenburg, Sweden

- The Pensions Council*  
Stockholm, Sweden, and Helsinki, Finland



# New Research Publications

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These reports (in full or in summary) can be downloaded from the Members Only website:

[www.conference-](http://www.conference-board.org/membersonly.htm)

[board.org/membersonly.htm](http://www.conference-board.org/membersonly.htm)

(If you experience log-on difficulties, contact: [rosa.correia@conference-board.org](mailto:rosa.correia@conference-board.org) for assistance)

Alternatively, complete this form, ticking the appropriate boxes, and send or fax it to:

**The Conference Board Europe**  
**130 Chaussée de La Hulpe**  
**1000 Brussels, BELGIUM**  
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**fax 32/2 675 03 95**

Name \_\_\_\_\_

Position \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Tel. \_\_\_\_\_

Fax \_\_\_\_\_

e-mail \_\_\_\_\_

1326-03-RR

- Corporate Contributions in 2001*  
 This annual survey of corporate giving in the United States shows that contributions rose to \$4.5 billion in 2001 (the latest year for which official figures are available), an increase from \$3.9 billion the previous year. The increase in corporate charitable giving is thought to be spurred by the September 11 terrorist attacks and their aftermath.

SR-03-04

- Commission on Public Trust and Private Enterprise*  
 The complete findings and recommendations of The Conference Board's Commission on Public Trust and Private Enterprise relating to: Executive Compensation, Corporate Governance and Audit and Accounting.

1325-02-RR

- Beyond the Hype: E-nabling the Sales and Marketing Force*  
 E-nabling is defined as the implementation of digital and communication technologies in order to improve performance. This report, based on survey responses and interviews, examines the impact of e-nabling on the sales and marketing functions.

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- International Economic Scoreboard*  
 The latest quarterly round-up of international economic forecasts and opinions, looks particularly at economic prospects in the US, Germany, Switzerland, Japan, Australia, Singapore and Brazil.

1324-02-RR

- Directors' Compensation and Board Practices in 2002*  
 Reports the amount and type of compensation paid to outside directors in 2002 in 662 companies in three major industry sectors. Also looks at practices regarding committee service, benefits for

outside directors, board leadership and board composition.

1323-02-RR

- Top Executive Compensation in 2001*  
 This study reports average 2001 compensation of the five highest paid executives in 2,841 companies in 14 major industry sectors.

1322-02-RR

- The CEO Challenge – Top Marketplace and Management Issues – 2002*  
 The latest annual survey of more than 700 global CEOs concludes that chief executives and their senior managers are most concerned with the kinds of decisions that are appropriate to a time of turmoil and transparency: financial prudence, looking to get more from existing technologies, and building trust with employees and customers.

1321-02-RR

- HR Outsourcing Trends*  
 This study, based on 125 survey responses from senior executives in Europe and the US, examines the benefits, challenges, and alternatives to HR outsourcing.

1320-02-RR

- HR Technology Strategies*  
 Considers the HR technology plans and strategies of a number of companies in The Conference Board's North American and European Working Groups on Technology for Human Resources, all at different stages of implementation.

1319-02-RR

- Voices of Experience: Mature Workers in the Future Workforce*  
 Companies are finding that many of their employees will soon be eligible for retirement, but that qualified incumbents are not available to fill their ranks. This study explores the retirement intentions and perspectives of employees aged 50 and above at eight companies, members of the Working Group on Engaging Mature Workers.