

# A *reboot* of the Single Market

Specific business cases from Swedish SMEs showing the potential of a fully integrated Single Market, with a reduction of regulatory burdens to support their growth and competitiveness.



### Executive summary

The Single Market helps secure the growth and resilience of the EU economy at a time of increasing geopolitical tensions, re-evaluation of global value chains. This catalogue provides examples of regulatory initiatives at the EU level that can help innovative SMEs scale up and build competitiveness through the Single Market.

#### Set a bold and ambitious vision for the Single Market

The Single Market is key to establishing an economy that works for people, securing a stronger Europe in the world and making Europe fit for a rapidly changing economy.

#### Build a culture of trust and compliance

Frictionless trade in the Single Market requires fewer and better regulations, as well as complete, correct and immediate transposition of these regulations into national legislation.

#### Create a green, circular Single Market

Trade is necessary for innovation and reducing the costs of the green and digital transition. Since the climate crisis is a global crisis, it is vital that we spread innovation through trade within and outside of the Single Market.

#### Use digital tools and solutions to create conditions for growth

The efficiency and effectiveness of EU legislation can be undermined by a high degree of complexity in its actual application. Digital tools can be applied to lower the costs of collecting, updating and making information utilised.

# Specific examples of SMEs put the 11 recommendations into context

Fjälkinge – SME sourcing across the EU		1	Adopt an ambitious strategy for the Single Market
		2	Strengthen SOLVIT and commit SOLVIT to acting more proactively and to raising awareness
Confident Approach – an SME that helps break down barriers to sales		3	Conduct a data flow test of all existing and new EU regulations
General Plastics Scandinavia – an SME in the circular economy	$\Rightarrow$	4	Upgrade the European Semester and close the compliance gap
Röyk – an SME delivering sustainable clothing	$\Rightarrow$	5	Strengthen the use of the Better Regulation Toolbox
Ventilationscentrum – an alliance with unique technical expertise		6	Map and remove regulatory barriers to trade in climate goods and services within the Single Market
Trevit AB – an SME with a growing production footprint in Europe	$\Rightarrow$	7	Design the digital European product passport in a way that makes the circular work of businesses easier
		8	Create a one-stop-shop to Member States' extended producer responsibility (EPR) systems
N!CK's – an SME that consider cross-border expansion necessary for their survival	$\Rightarrow$	9	Create a single VAT ID, and extend the VAT one-stop-shop
Zlideon – an innovative SME with a green solution		10	Recognise digital labelling as a true substitute for physical labelling
		11	Create an easy, fast, reliable and low-cost system for cross-border payments

# Set a bold and ambitious vision for the Single Market

Adopt an ambitious Single Market Strategy



Adopt a Single Market Strategy, with SMEs at the centre, that clearly reinstates the Single Market at the forefront of the EU's integration efforts, green transition and innovation agenda.

Strengthen SOLVIT and commit SOLVIT to acting more proactively and to raising awareness

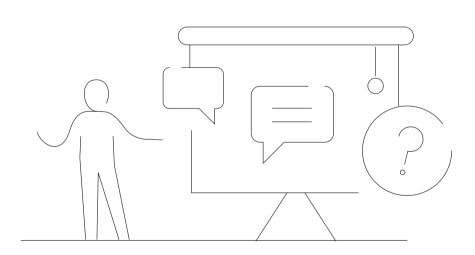


Designate a Single Market
Ombudsman in each Member State
as a national independent body
with access to effective remedies
and a network of Single Market
Ombudsmen.

Gonduct a data flow test of all existing and new EU regulations



Implement a data flow test that acknowledges the principle of data protection in the EU but limits the risk of creating unjustified burdens when applying data protection rules.



### Fjälkinge – SME sourcing across the EU

#### Meet Robin Hansson – CEO at Fjälkinge Isolering & Plåtservice

Fjälkinge Isolering & Plåtservice is a family-owned company specialised in isolation and sheet metal constructions. The services offered by the company include isolation of industrial equipment, installation of sheet metal roofs, and cooling solutions. Total revenue in 2022 amounted to EUR 1.5 million, and the company has 15 employees.

To get the best insulation materials at competitive prices, Fjälkinge Isolering & Plåtservice sources from several EU countries. As an example, importing materials from Germany (one of the frontier countries in terms of developing new insulation materials with high energy efficiency) makes the company's services both cheaper and more sustainable.

The company's insulation and construction services are highly specialised, and the company recruits workers from several EU countries.

The EU construction industry employs around 13 million people, with another 15 million people employed indirectly. The industry contributes to roughly 10% of EU GDP, with a turnover of approximately EUR 1,000 billion. The construction industry is composed of 99% SMEs.

Continue to strengthen the four freedoms in the Single Market that have helped to secure growth and prosperity in Europe over the past 30 years



#### Obstacles accumulate during the business journey

#### Call for action

Fjälkinge Isolering & Plåtservice encounters several regulatory obstacles that accumulate through its business journey within the Single Market. The construction industry is often regulated by national standards rather than EU legislation, which hinders the company's reuse of knowledge, materials, and tools across Member States. When buying materials online, the company experiences significant differences in consumer rights, which makes it costly and uncertain to source within the Single Market. Also, Fjälkinge Isolering & Plåtservice finds it very difficult to hire installers from other Member States. Also, Fjälkinge Isolering & Plåtservice finds it very difficult to hire installers from other Member States, related for example to approval of qualifications.

### Potential

The existing patchwork of directives, regulations and national laws drives up transaction costs in the construction industry, with different rights and agreements for different Member States.

Realising the four freedoms of the Single Market will make it easier for a SME like Fjälkinge Isolering & Plåtservice to source materials and hire workers from other EU Member States. Regulatory simplification, harmonisation, and the introduction of common standards will reduce costs for suppliers to the construction industry with positive knock-on impacts for public and private entrepreneurs.

#### Uneven implementation of EU regulation adds costs

#### Call for action

Regulatory complexity and uneven implementation of EU regulation add costs for SMEs such as Fjälkinge Isolering & Plåtservice. Larger companies tend to enjoy better opportunities to shape common standards than smaller firms. Also, SMEs are less likely to be aware that they can bring a case to court when EU regulation is applied differently across Member States. A strong and proactive SOLVIT network can help SMEs become more aware of their rights and opportunities.

Strengthen
SOLVIT and
commit SOLVIT
to acting more
proactively and
raise awareness

Adopt an

ambitious

strategy for the

Single Market



"It would be great if we had been made aware of the opportunity to bring our case to the local SOLVIT centre"

#### **Potential**

The direct cost of tailoring its solutions to national standards in each Member State is significant. Efficient and simple regulation reduce compliance costs for private businesses. In addition, gathering information about national product requirements, obtaining the required tests, and getting formal approval are time-consuming tasks for Fjälkinge Isolering & Plåtservice.

### LEIA – a start-up tech offering support for new parents worldwide

#### Meet Sandra Wirström, CPO and co-founder of LEIA

LEIA was founded in 2021 with the vision to support women within their first year of motherhood. LEIA has developed a postpartum health tracker app that offers medically validated content (created by doctors, psychologists, midwives, breastfeeding professionals, parent coaches, and others) that is easily accessible and tailored to individual needs. The app offers features for monitoring physical and mental well-being, early detection of complications, and self-care checklists that support postpartum recovery.

LEIA has established its content databases in Europe and the US, but the app has been released globally. The vision is to support the next 280 million parents. According to statistics, up to 90% of these parents risk experiencing postpartum difficulties during the first year after childbirth. When the women do not get the help they need, it can have serious impact on both the mothers and their families.

LEIA is a part of the professional service market – a sector that provides close to 13% of total added value and 14% of EU employment. The business service sector is characterised by a large number of SMEs that supply services across the Single Market.

Unnecessary restrictions on data flows make it difficult for SMEs to optimise and grow their business around Al-powered solutions



#### Restrictions on data flow close markets

#### Call for action

The LEIA app relies on personal data. Offering the app globally requires detailed knowledge about national regulation and, in particular, the General Data Protection Regulation (GDPR) requirements in the respective markets. LEIA also needs to ensure that services delivering content to their databases comply with GDPR regulation.

LEIA frequently encounters grey areas in national guidelines, which makes it difficult to assess compliance. A data flow test can help ensure that personal privacy is preserved with minimal restrictions on data flows.

#### **Potential**

Conduct a data

flow test of all existing and new

EU regulations

Ensuring GDPR compliance required significant resources in the development phase, and LEIA assesses that a minimum of four weeks for a full-time legal compliance officer were used in the Swedish launch. . LEIA was granted legal assistance pro bono thanks to their participation in a Women in Tech Program, which saved the business up to EUR 20,000.

National GDPR guidelines are constantly being revised, and LEIA subscribes to a newsletter to monitor regulatory changes in key markets. The company is aware that changes and extensions to the app will require external legal support.

### Build a culture of trust and compliance

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Upgrade the European Semester to include recommendations on how to harmonise implementation of EU regulation and close the compliance gap



Incentivise Member States to correctly apply and take political ownership for the correct application of EU rules by integrating recommendations on closing the compliance gap and effectively reducing regulatory burdens in the European Semester.

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Strengthen the use of the Better Regulation Toolbox by integrating implementation into the design of new regulation and consistently respecting impact assessment requirements



Prioritise integration of implementation into the design of new regulations, and adhere to the requirements concerning impact assessments, particularly in regard to SMEs.

# General plastics scandinavia – an SME in the circular economy

#### Meet Peter Andersson, CEO of General Plastics Scandinavia

General Plastics Scandinavia trades in a wide range of plastic materials. Their business model involves sourcing, buying and selling plastics. Usually, the plastic is sourced from industrial companies as residue from production and then transported and sold to recyclers throughout Europe. Put simply, General Plastics Scandinavia can be considered a plastic broker, acting as the middleman between industries and recyclers and handling the transaction between the two.

General Plastics Scandinavia carries out their transports by lorry and has warehouses in Sweden, Germany and Italy. They use the warehouses for intermediate storage between picking up goods from industries and delivering to recyclers.

The company was founded in 2001 and had revenue of EUR 3.8 million in 2022.

The EU plastic market employs around 1.5 million workers and is composed of over 50,000 companies, the majority being SMEs with an average of 29 employees. In 2020, the market had a turnover of EUR 330 billion. In 2021, the EU had a positive trade balance in plastics of around EUR 14.4 billion.

Correct implementation of EU rules within Single Market would add an additional EUR 520–600 billion to EU GDP every year



#### Lack of compliance with EU rules increases costs

#### Call for action

Much of the materials used by General Plastics Scandinavia are classified as waste and fall under the EU Waste Directive. The firm needs to get a statement from the Swedish Environmental Protection Agency that the company complies with EU regulation. This statement is based on the Swedish interpretation of the regulation, which deviates from the German, Austrian and Italian interpretations. When General Plastics Scandinavia drives waste materials from Sweden to Italy, it needs to ensure that it complies with the most restrictive interpretation of common EU regulation.

#### **Potential**

Inconsistent interpretation of common EU regulation and incomplete implementation into national legislation enhance the uncertainty of doing business across borders in the Single Market. General Plastics Scandinavia estimates that complying with the most restrictive interpretation increases their costs by 5–10%, which makes it difficult for them to stay competitive.

"If you solve the lack of compliance with common EU regulation, you will have solved 95% of the problems in the Single Market"

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Upgrade the European Semester and close the compliance gap

# Röyk – an SME delivering sustainable clothing

#### Meet Sara Ollermark and Isabelle Persson, Co-founders of Röyk

Röyk is a Swedish sustainable clothing brand that was founded in 2010 after winning an innovation contest. The company's work in furthering sustainability, their core value, has earned them numerous sustainability awards over the years.

The focus of their product line lies within outdoor and lifestyle apparel. All products are made from sustainable materials like wool, hemp, and recycled synthetics. Röyk designs all clothes and products in-house, and most products are manufactured in Europe. The company controls and certifies every stage of the production.

Röyk's clothes are available internationally from their own online store, online marketplaces and retailers. Röyk has warehouses in Sweden and Germany. Before the pandemic, the majority of sales were made through retailers, but they lost listings during the pandemic, which necessitated a pivot to an online sales model.

In 2022, Röyk had a turnover of EUR 1 million.

Röyk is part of the EU textiles and fashion industry. The 143,000 companies within this industry collectively turn over EUR 150 billion, employ 1.3 million workers, and contribute EUR 58 billion to extra-EU exports.

The Better Regulation Toolbox commits the EU to designing, delivering and supporting the implementation of high-quality policies



#### Sustainability efforts with implementation at the centre

#### Call for action

Around 90% of Röyk's production is destined for the Swedish market, but demand for sustainable clothing is increasing across Europe. The company sells through online marketplaces, but complex VAT regulations and payment systems require significant resources that could have been used on expanding the business. With the 2018 waste package legislation, the company faces new reporting requirements. Röyk has had its compliance calculations approved by a German research institute – a process that the company will need to repeat if it expands to other markets.

For a company like Röyk, it is critical that new and ongoing initiatives, such as the new EU Strategy for Sustainable and Circular Textiles and the 2023 revision of the Waste Framework Directive, are coordinated and based on the Better Regulation Toolbox, with solid impact assessments and focus on implementation.

#### **Potential**

Strengthen the use of the

Toolbox

**Better Regulation** 

Röyk estimates that it takes around 6 months to launch in a new country, because it takes time to secure compliance with national and EU regulation. A one-stop-shop for information on national requirements and reporting would be a great help.

### Create a green, circular single market

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Map and remove regulatory barriers to trade in climate goods and services within the Single Market



The removal of barriers to trade is important for all goods and services, both within and outside of the Single Market. Trade is the tide that lifts all boats. When it comes to climate goods and services, mapping critical barriers and developing a roadmap for their removal are vital measures that promise to reduce costs, foster innovation, and boost trade overall.

7

Design the digital
European product
passport in a way that
makes the circular work
of businesses easier



A well-designed digital product passport based on stakeholder input minimises the risk that administrative burdens and costs for businesses reduce the potential of the passport to support circularity and fragment the Single Market.

# Ventilationscentrum – an alliance with unique technical expertise

#### Meet Martin Ancons, Co-founder of Ventilationscentrum

Ventilationscentrum is an alliance of ventilation companies, supported by the municipality of Enköping in Sweden. 70% of the ventilation technology that is used in the world is developed in Enköping, and the purpose of Ventilationscentrum is to gather, nurture, and spread the Swedish expertise. The aim is to enable the industry to expand and scale up internationally.

There is a huge shortage of ventilation technicians in the Swedish construction industry. It is difficult to get young people to enrol in the specialised training that provides the required skills.

Ventilationscentrum develops training materials, conducts courses, and offers advice on regulations related to ventilation technology. For example, Ventilationscentrum developed the curriculum that's currently used in higher vocational education programmes for ventilation technicians in Sweden.

Ventilationscentrum is part of the EU ventilation sector – a key actor in the green transition. Buildings alone account for 40% of EU energy consumption and, as an example, households can save up to 30% of their heating costs by applying energy efficient ventilation.

Trade in climate goods hinges to a large extent on the ability to provide indispensable climate-related services



#### Lack of EU standards limits services trade

#### Call for action

Energy savings and indoor climate improvements are key EU sustainability priorities, and the installation of efficient ventilation systems is critical to both. The specialised skills required for operating, maintaining, and installing ventilation systems are in short supply in many EU countries. This shortage of expertise, if unaddressed, poses a risk of stalling the green transition.

A standardised ventilation technician training programme that applies across members of the Single Market and is based on the four freedoms would both increase the pool of available technicians and make it easier to conduct services across countries.

#### **Potential**

Removing regulatory barriers to the cross-border provision of installation, operation and maintenance services will help EU firms provide the ventilation systems and supportive services that are needed in the transition to a more sustainable economy.

"The global demand for ventilation systems is growing, and transnational mobility of technicians is needed for EU firms to grasp this global opportunity. The development of standardised ventilation technician training can pave the way for EU exports"

Map and remove regulatory barriers to trade in climate goods and services within the Single Market

# Trevit – an SME with a growing production footprint in Europe

#### Meet Göran Agardh, Chairman of Trevit AB

Trevit was founded in 1995 with the purpose of distributing an American toothpaste brand in Scandinavia. The company has since expanded into a cosmetics house and holding company with inhouse brands like IDUN Minerals, Ida Warg Beauty, and Letsfaceit, as well as distribution of private labels. Headquartered in Stockholm, Trevit had a turnover of EUR 23 million in 2022.

Trevit operates all across Europe and has offices in all Nordic countries. Lately, the company has been homeshoring production from China to Europe and wants to be a driving force in establishing sustainable production in Europe.

Products in the cosmetics industry are typically packed in tubes and bottles made of plastic. To switch to lighter plastics that are more recyclable and offer better circularity, IDUN Minerals has moved all component manufacturing to Europe and replaced all packaging. Further, they have removed all black plastics from their products to improve their sustainability.

Trevit is part of the EU cosmetic industry – an industry that employs more than 2 million workers and adds value of at least EUR 29 billion to the EU economy annually. The sector is an innovation driver, with 77 scientific innovation facilities in Europe.

The digital product passport aims for sustainable production, circular business models and transparency for consumers



#### Regulation risks slowing down innovation

#### Call for action

The new design of the cosmetic packaging has increased costs, but the reduced use of plastics has lowered the company's  $\mathrm{CO}_2$  emissions by two tons every year. Trevit underlines the importance of incentivising firms to make such innovative investments and levelling the playing field relative to non-green products.

During the switch to lighter plastics in the packaging of their products, Trevit ensured that the new packaging complied with the different labelling requirements in the individual Member States.

#### **Potential**

The requirement to have local languages on packages means that Trevit needs to use a larger outer packaging than what the size of the products actually merits. Being free to replace parts of the physical labelling with a digital product passport would enable Trevit to reduce the size of their outer packaging.

"The smaller packaging, for one product alone, saved around two tonnes of fossil plastic every year and reduced costs and CO<sub>2</sub>. This is now being extended to selected IDUN Minerals products"

7

Design the digital European product passport in a way that makes the circular work of businesses easier

# Use digital tools and solutions to create conditions for growth





# Trevit – an SME in a regulated and highly competitive sector

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Extended Producer
Responsibility includes
registration or licensing,
take-back, disposal, recycling,
and quantity reporting



#### Unclear regulation creates uncertainty and financial risks

#### Call for action

Trevit finds that there are several layers of regulation to consider when entering into contracts on producer responsibility, and Member States have very different applications of EU regulation. The manufacturer has an interest in passing on this responsibility, and this makes it unclear how far producer responsibility extends. This complexity poses great uncertainties and financial risks of a SME like Trevit, which risks ending up in costly and lengthy disputes. Simple, streamlined, and harmonised regulation on producer responsibility is needed to help SMEs scale up through the Single Market, including on the Extended Producer Responsibility (EPR) schemes.

#### **Potential**

The creation of a digital one-stop-shop for EPR can facilitate single EPR registration and reporting. It can also serve as a centralised and up-to-date information portal on EPR requirements across all Member States, operating at the product-level. This would make business less risky and complex for an SME like Trevit.



"The whole purpose of the Single Market is to make it easy. You should not have to be afraid of exports"

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Create a onestop-shop for Member States' extended producer responsibility (EPR) systems

# N!CK's – a SME that consider cross-border expansion necessary for their survival

#### Meet Pierre Magnusson, Head of E-commerce at N!CK's

N!CK's is a Swedish company that sells sugar-free and low-calorie confectionary products, including chocolate bars, protein bars, sweeteners, and ice cream. To create delicious but low-calorie confection, N!CK's sources and uses high quality sweetening ingredients, such as stevia and erythritol.

N!CK's sells through their own online store, distributors, and online marketplaces. In 2018, the company became the best-selling foreign brand on Amazon UK. Their products are available throughout Europe and on the North American market, and they maintain stocks in e.g., Germany, France, Italy, and other EU countries.

The company is currently headquartered in Stockholm and employs almost 170 people across its offices in Sweden and the US and its factory in Macedonia.

N!CK's is part of the EU food industry. which is one of the core pillars of the EU community, and the largest employer of all manufacturing sectors. The industry **employs** around 4.6 million people and generates a turnover of close to EUR 1,100 billion and added value of almost EUR 230 billion. **SMEs contribute** approximately 40% of the turnover and 58% of employment.

On average, SMEs require 13 documents to complete one VAT registration process, and 100 days to get a VAT number



#### Using multiple VAT numbers drives up costs

#### Call for action

While the introduction of the VAT one-stop-shop return in 2021 reduced the administrative costs for N!CK's, it has not fully solved the problem. When N!cks stores inventory in another EU country (closer to customers to shorten delivery times), the company still needs to VAT register in every country of storage, which can take 4-6 months. To comply, N!CK's has VAT numbers in the seven EU countries where it stores products. Extending the one-stop-shop to pan-EU inventory storage and onward sales would considerably reduce the need for multiple VAT registrations. A single VAT ID across the EU would allow N!cks to take full advantage of the Single Market and remove obstacles for further expansion across EU borders.

#### Potential

VAT declarations require 1–3 working days for the finance department every month.

N!CK's also uses an external VAT consultant to ensure compliance, and lawyers to get the refunds that they are entitled to. Still, N!CK's has sometimes had to wait a year to get their cash back, which hurts their case flow and liquidity planning.

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Create a single VAT ID and extend the VAT one-stop-shop "For example, in Spain, we needed two lawyers' help to file for a VAT number, and it took several months before we got it, as we only received a local TAX ID to start with. In the meantime, we had to write manual invoices, hundreds of them."

### Zlideon – an innovative SME with a green solution

#### Meet Eva Wilander, Founder and CEO of Zlideon

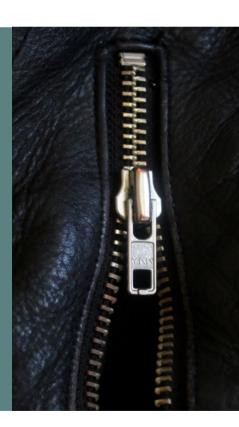
Zlideon is a Swedish innovation-driven company founded in 2005. The company produces a zipper pull that can be used to repair broken zippers. When zippers break, the normal solution is either to sew in an entirely new zipper or discard the garment. With Zlideon's product, the zipper pull is replaced, which saves the customer money and contributes to sustainable consumption.

The zipper pull is produced in Germany, and the company itself has two employees with a turnover of EUR 0,5 million in 2022. The product is sold through resellers, such as Lindex in Sweden, but also through direct sales at Zlideon's online shop and online marketplaces. Maintaining an international web of production, sales, and storage facilities like this makes VAT registration extremely costly for a SME like Zlideon.

Zlideon is part of the EU textiles and fashion industry. The industry has a turnover of EUR 150 billion, employs 1.3 million people, includes 143,000 companies, and contributes EUR 58 billion to extra-EU exports.

Moreover, Zlideon is part of the European sustainable innovation movement, an important driver for sustainable development.

Digital labelling can respond to the increased demand for transparency on products purchased



#### National labelling increases costs and CO, emissions

#### Call for action

The zipper pull is very small, and Zlideon has designed an environmentally friendly packaging that is completely plastic-free. The product is simple to use, but the requirement to have local languages on the package means that the company needs to use a larger outer packaging than the actual size of the zipper pull would really merit. Having the opportunity to replace the physical labelling with digital labelling would enable the company to reduce the size of the outer package. The customer could simply scan a QR code to access the labelling in their local language.

#### **Potential**

Zlideon estimates that digital labelling could reduce its packaging by 20% and costs by approximately EUR 15,000. Besides the benefits in terms of costs, digital labelling would also save Zlideon from having to tailor their packaging to individual markets. This would give them greater flexibility and allow them to increase their production scale.



"Sometimes we decide not to enter new markets because it would require us to introduce another type of packaging"

#### Small cost differences can give local firms an advantage

#### Call for action

Cheap and easy cross-border payment methods are critical for the functioning of the Single Market. Currently, the cross-border payment options available are dominated by a limited number of financial services corporations. They charge high fees to merchants, which pushes up costs for consumers and disadvantage SMEs. For domestic payments, there are often more options such as bank transfer. Creating conditions for the development of low-cost cross border payment systems will help ensuring that consumers and merchants can trade with confidence across borders inside the Single Market at low cost.

#### **Potential**

A competitive ecosystem would level the playing field for a SME like Zlideon while also ensuring that EU consumers have access to a diverse range of providers and pay the same fee irrespective whether they choose a local or foreign provider.



"For simple, low-margin products like ours, even small differences in transaction fees can impact customers' choice."

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Recognise digital labelling as a true substitute for physical labelling

11

Create an easy, fast, reliable and low-cost system for cross-border payments



### 11 Recommendations

1	Adopt an ambitious Single Market Strategy
2	Strengthen SOLVIT by establishing a Single Market Ombudsman in every EU Member State, and commit SOLVIT to acting more proactively on structural cases and to raising awareness
3	Conduct a data flow test of all existing and new EU regulation
4	Upgrade the European Semester to include recommendations on how to harmonise implementation of EU regulation and close the compliance gap
5	Strengthen the use of the Better Regulation Toolbox by integrating implementation into the design of new regulation and consistently respecting impact assessment requirements
6	Map and remove regulatory barriers to trade in climate goods and services within the Single Market
7	Design the digital European product passport in a way that makes the circular work of businesses easier
8	Create a one-stop-shop to Member States' extended producer responsibility (EPR) systems
9	Create a single VAT ID and extend the VAT one-stop-shop
10	Recognise digital labelling as a true substitute for physical labelling
11	Create conditions for the development of easy, fast, reliable and low-cost cross-border payments for both euro and non-euro payments

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