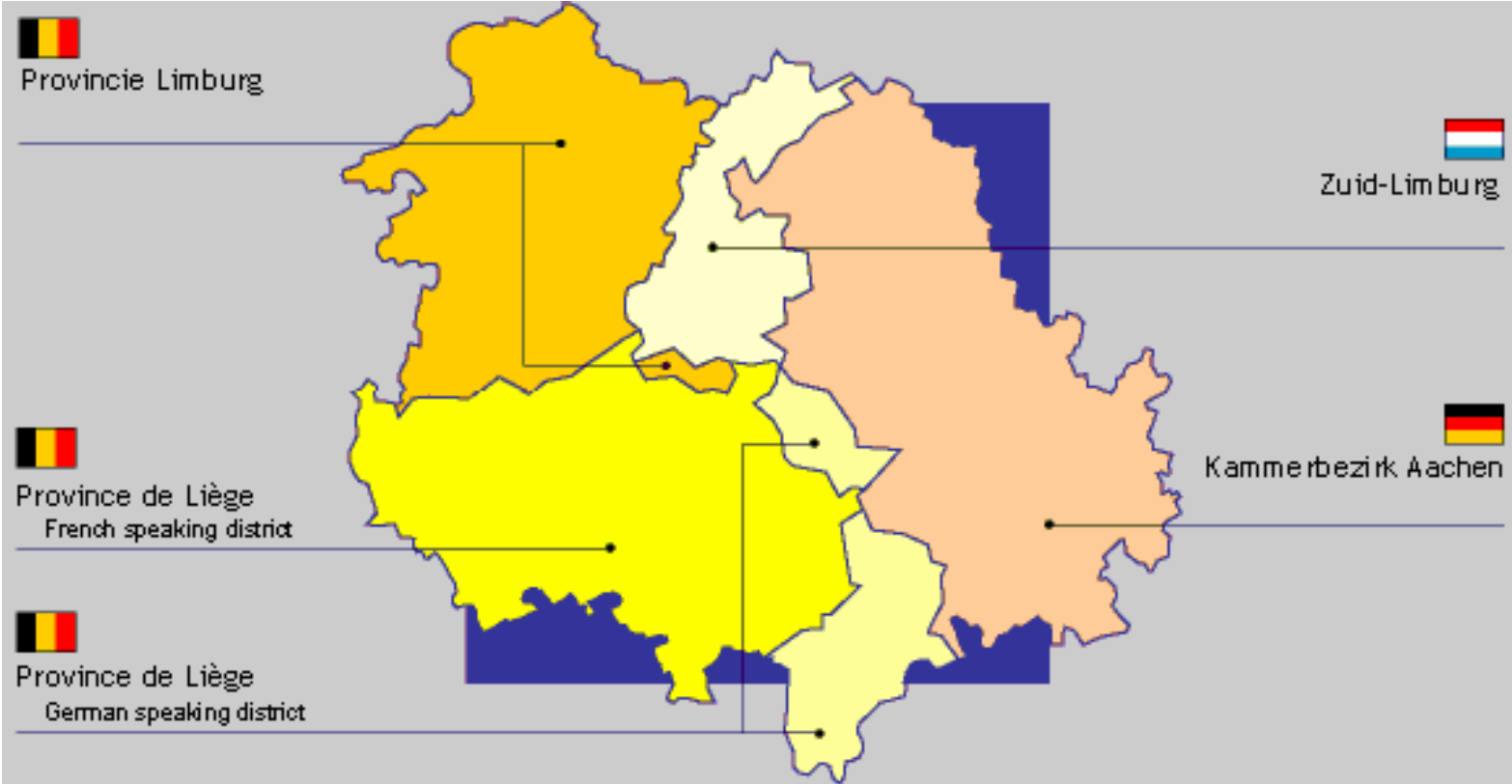


# EUREGIONAL TRADE FLOWS



**PART 1: Euregio Meuse-Rhine (MAIN REPORT)**



# EUREGIONAL TRADE FLOWS

This is a project of the Chambers of Commerce Euregio Meuse-Rhine.

- Kamer van Koophandel en Fabrieken voor Zuid-Limburg •
- Industrie- und Handelskammer Aachen •
- Industrie- und Handelskammer Eupen-Malmedy-St. Vith •
- Chambre de Commerce et d'Industrie de Liège-Verviers •
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# EUREGIONAL TRADE FLOWS

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**PART 1: Euregio Meuse-Rhine (MAIN REPORT)**



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**Table 0.1 Euregional trade: export versus import**

	<b>Export</b>	<b>Import</b>
Share of businesses	38%	36%
Share of foreign trade in overall trade	27%	42%
Share of Euregional trade in foreign trade	22%	28%
Share of Euregional trade in overall trade	6%	12%

## 0 SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

### 0.1 Summary

#### **General**

Around 40% of businesses in the Euregio export to foreign markets worldwide and over a third import goods or services from abroad. Almost all exporting companies also export to the Euregio; about 6% of their overall turnover is generated by exports to the Euregio. Not all importing companies import from the Euregio; 12% of overall purchases made by importing companies based in the Euregio are generated through imports from the Euregio.

Businesses in Belgian Limburg are the biggest exporters to and the biggest importers from the Euregio. It is not surprising that a relatively large amount of Euregional business is carried out by companies in Belgian Limburg, since most companies consider Flanders to be their domestic market. This has two consequences. In the first place, this domestic market is so small that companies are more likely to turn to export and/or import activities. Secondly, this trade not only involves doing business with Zuid-Limburg (NL) and the Aachen Region, but also often with Wallonia (itself Belgian, but Euregional within the scope of this study). The same is likewise true for businesses in the Province of Liège, which consider Wallonia as being their domestic market and not the whole of Belgium. The fact that companies here do less Euregional business than their Belgian Limburg counterparts, is because trade relations in the Province of Liège are more oriented towards France than the Dutch and German parts of the Euregio. In terms of percentage, international trade is lowest in Zuid-Limburg and Aachen Region. As far as the latter is concerned this may be due to the role of a much larger domestic market in Germany.

Two out of three Euregional exporting companies sell directly, with one in five making use of intermediaries. Nine out of ten Euregional importing companies import directly.

Evidently, companies find the obstacles of doing international business in the Euregio more difficult to overcome for export than for import, which more often means calling in the services of an intermediary for export than for import activities.

#### ***The Euregio as an export region***

On the basis of 17 different criteria a picture has been formed of the *attractive* and *less attractive aspects* of the Euregio as an export region. In particular, businesses viewed the small geographic distances that have to be covered as being positive; this reduces delivery times. One less attractive aspect of the Euregio however, is the restricted market size with marked competition and a bigger squeeze on prices. Differences in language and culture are not seen as an obstacle; after all, companies are familiar with cross-border regions and once they start doing business, feel more at ease working with foreign partners. What's more, it appears that most trade relations occur between areas where the language is more or less the same; German is not a problem for companies based in Belgian or Dutch Limburg. However, doing business in the French-speaking part of the Euregio forms more of an obstacle, but one which is easily overcome once companies start doing business with each other. With regard to differences in regulations and tax systems, businesses see the Euregio in much the same light as other foreign markets (it is self-evident that this is not an issue for business carried out between Wallonia and Flanders).

On the basis of eleven possible barriers to export in the Euregio, it would seem that - on balance - there are few. The biggest problem - relatively seen - would seem to be finding the right partner. All things considered, the differences in language, culture, regulations and tax systems do not form a barrier any more once export trade is actually up and running. At that point, the market information would appear to be adequate.

**Table 0.2 The attractiveness of the Euregio as an export and import region**

	Export (figure 3.4)*	Import (figure 4.4)**
Most attractive aspects (top 3)	Delivery times (+) Customer relations (+) Service provision (+)	Type of providers (+) Better quality (+) Delivery times (+)
Least attractive aspects (top 3)	Competition (-) Sale prices (-) Tax differences (o)	Tax differences (-) Regulations (-) Purchase prices (+)

NB. The views are limited exclusively to companies which do export (\*) and/or import (\*\*) business in the Euregio

*The term 'least attractive' is self-evidently not the same as 'unattractive'. By way of illustration, 'purchase prices' is listed as one of the least attractive aspects of doing import business in the Euregio. This doesn't necessarily mean that businesses see the Euregio as an unattractive import region because of the high level of import prices in the region. If compared with purchase prices elsewhere, the Euregio still scores relatively well. For most other aspects however, the Euregio (still) scores better.*

*Aspects listed in green with a plus sign alongside (+), are aspects which the Euregio singles itself out more positively from other trading regions. Aspects displayed in orange with a zero alongside (0), are those where the Euregio does not differ from other trading regions. Only where an aspect is displayed in red with a minus sign alongside (-), is the Euregio less attractive than other trading regions for that particular aspect.*

The study looked at 17 *reasons not to export to the Euregio*, targeting companies not exporting to the Euregio. One of the reasons not to do so, was an inability to find the right market information and another reason related to language. In general, arguments such as not being able to guarantee reliable deliveries, not delivering quickly enough, not being able to provide an adequate level of service, excessive transport costs or the necessity of having to use an intermediary, were not mentioned as barriers. These aspects - typically aspects related to distance - do not represent an obstacle for businesses which are not (yet) exporting to the Euregio.

### ***The Euregio as an import region***

On the basis of 16 different criteria a picture has been formed of the *attractive* and *less attractive aspects* of the Euregio as an import region. In general, the Euregio would appear to be more attractive as an import region than other international import markets. Businesses are positive about the presence of the right providers able to supply the right quality in a reliable way. There is a negative attitude to the differences in regulations and tax matters.

Eleven *barriers* are mentioned which might occur when importing from the Euregio. All things considered, such barriers do not exist. So, for example, differences in culture, language, tax systems and any non-availability of market information are not specified as barriers. For businesses actually doing business, these issues are no longer perceived as a barrier. Barriers which might occur relate to ambiguity with respect to quality standards; in some cases these are sometimes viewed as being too high, in other cases too low.

Businesses which do not import from the Euregio were asked to give *reasons for not importing from the Euregio*. In general perhaps the most common reasons for not importing from the Euregio include the difficulty in finding market information and the fact that the right suppliers are lacking. The following reasons for not importing from the Euregio do not apply: impossibility to deliver quickly, impossibility of providing a good service, too many cultural differences, too much investment required (e.g. an intermediary).

## **0.2 Conclusions**

Like any other international trading zone, the Euregio is a normal international market. For example, there are still big differences to be found in the tax systems and regulations in the Euregio. However, in addition to being an international market, the Euregio can also be considered to be a domestic market. In geographical terms, it is relatively small. Many of the benefits it has to offer are to do with the small distances involved.

The Euregional market has its attractive and less attractive points. Both exporting and importing companies emphasise reliable deliveries, short delivery times and the right quality as being attractive. Amongst the more unattractive aspects, exporting companies mentioned the keen competition and the squeeze on sales prices; importing companies see it as an attractive import market because of the relatively low purchase prices and good quality.

As well as being a normal market, in a number of ways, the Euregio can also be considered to be a special (international) market. In terms of geographical area and numbers of businesses, it represents a relatively small market compared with world markets. Buyers and sellers are located close to each other and information about availability, quality and delivery times and reliability of delivery, in particular, were perceived as extremely positive aspects. Once companies start doing cross-border business, differences in language and culture no longer present a problem; however, the differences in the tax system and regulations remain. Despite concerted attempts to harmonise regulations at a European level, at a regional level, not much can be done because regulations are based on decisions taken at a national level.

Most companies are involved in export and import activities in the Euregio itself. Exporting Euregional companies make more use of go-betweens than for import. Exporting, finding an export market or finding the right customers is evidently more difficult than importing. In the Euregio, it is seemingly easier to find foreign suppliers than foreign customers.

**Table 0.3 Trade barriers within the Euregio**

	Export (figure 3.5)*	Import (figure 4.5)**
Relatively small obstacle (top 3)	Co-operating partners (+) Cultural differences (+) Language differences (+)	Delivery times (+) Service provision (+) Cultural differences (+)
Relatively large obstacle (top 3)	Sales prices (-) Competition (+) Quality requirements too high (+)	Quality too high (+) Quality too low (+) Purchase prices (+)

NB. The views are limited exclusively to companies which do export (\*) and/or import (\*\*) business in the Euregio

*The term 'relatively large obstacle' is self-evidently not the same as 'an insurmountable obstacle'. By way of illustration, sales prices in the Euregio are, in general, seen by exporting companies as a (limited) barrier to trade by exporting companies. In other words, (slightly) more exporting companies feel that sales prices form an export barrier than those which do not feel that sales prices are a barrier. Additionally, a relatively large section of exporting companies sees competition in the Euregio as a barrier to export. However, a (small) majority of exporting businesses do not think that competition forms a barrier to export.*

*Aspects listed in green with a plus sign (+), do not form a trade barrier for the majority of businesses. Only where an aspect is listed in red with a minus sign (-), does this mean that a majority of companies feels that the aspect concerned forms a trade barrier.*

For companies actually importing from the Euregio, finding the right level of quality represents a special problem, more specifically a problem where in some case the quality is too high and in other cases too low.

Finding the right market information seems to be more of a barrier for those companies not yet exporting to the Euregio, than for those not yet importing from the Euregio. Companies trading on a Euregional basis indicate that, in practice, obtaining market information isn't that much of a problem at all.

### 0.3 Recommendations

In Etil's opinion, 'The Euregio Meuse-Rhine: your international market at home!' should be the key thrust of Euregional trade policy pursued by the Euregional Chambers of Commerce.

Thanks to the excellent (inter)national road network (E25, E40, E313 and E314), businesses in the Europe are able to take every advantage of the short distances within the Euregio (although the north-south link still needs improving). The physical proximity offers many (potential) benefits, such as short delivery times, high levels of reliability in delivery, low transport costs and good levels of service provision. In addition, these short distances have the advantage that, in practice, existing cultural differences at a Euregional level are often smaller than at a national level. The physical proximity and the minor differences in culture also have an additional advantage that companies can trade directly in the Euregio, without the need for an intermediary or major investment, that is of course, if it's possible to speak or at least understand your neighbour's language. Getting the right market information is then made easier. As a result of these characteristics, for many Euregional businesses, the Euregio provides an ideal platform on which to expand their international operations.

However, these advantages have neither been fully acknowledged nor harnessed. Whilst this is partly due to language differences, the biggest

obstacle is formed by the relatively large differences in the tax regimes and regulations. In this respect the Euregio Meuse-Rhine does not yet form a domestic market for companies in the constituent regions, so Euregional trade is still seen as export and import and does not differ, or at least only slightly, from international trade in general.

#### ***Communication: promoting the Euregio as an international market at home***

The Chambers of Commerce must convey the message clearly that doing business in the Euregio is an attractive prospect. As with any other international market, there will of course be differences in tax and regulations, but differences in language and culture play a much more limited role than on other international markets. As a result of this and the much smaller distances, it is possible to carry out trade activities from one's own place of business without the need for intermediaries and/or extra investment. The study indicates starting points from which to undertake actions aimed at making the 'Euregio Meuse-Rhine: an international market at home!' After all, all the right suppliers and customers are present in this relatively small area. It is therefore important to create a picture of an international market at home, where relatively low transport costs prevail, where the right suppliers and customers can be found providing the desired quality, deliveries and reliability of delivery and where no major language or cultural barriers exist.

#### ***Shifting the emphasis (in part) from export to import***

The Euregio is an attractive import market with low prices, low transport costs, the right suppliers, good quality and quick and reliable deliveries. In consequence, it follows that the market, as an export market, is less attractive: too much competition and a squeeze on prices hinder businesses exporting to the Euregio. This picture of the Euregio needs to be more clearly projected in order to get across the intrinsic characteristics of this (domestic) market more convincingly. In the first instance, an emphasis needs to be placed on its attractiveness as an import market.

**Table 0.4 Reasons not to carry out Euregional trade**

	Export (figure 3.6)*	Import (figure 4.6)**
Relatively unimportant reason (top 3)	Reliability of delivery (+) Delivery times (+) Service provision (+)	Delivery times (+) Service provision (+) Cultural differences (+)
Relatively important reason (top 3)	Market information (-) Language differences (+) Type of customers (+)	Market information (+) Type of suppliers (+) Language differences (+)

NB. The views are limited exclusively to companies which do not export (\*) and/or import (\*\*) in the Euregio

*The term 'relatively important reason' is self-evidently not the same as 'a decisive reason'. By way of illustration, there are relatively many businesses which desist from doing Euregional trade because of language differences, but for a majority of businesses these language differences do not form a reason for not doing Euregional business.*

*Aspects listed in green with a plus sign (+) do not form a reason for not carrying out Euregional trade for a majority of businesses. Only where an aspect is listed in red with a minus sign (-) does this aspect form a reason not to carry out Euroregional trade for a majority of businesses.*

### ***Tackling misconceptions: 'telling the success stories'***

Businesses not involved in Euregional trade believe that there are too many differences - outside their sphere of influence - such as language, culture, tax and regulations, which makes it difficult to find and get hold of the right market information. In practice, this appears not to be the case, as many companies doing business in the Euregio will testify. It is the job of the Chambers of Commerce to eliminate these pre- and misconceptions. They can do this using targeted communication campaigns, by providing customised answers to companies asking for market information and by getting export and import businesses to relate their success stories.

### ***Highlighting quality perception***

Businesses in the Aachen Region and in the German-speaking part of the Province of Liège sometimes get the impression that the quality of their work (i.e. either too good or too poor) is misjudged by businesses in other parts of the Euregio. Targeted measures are needed to redress these preconceptions about quality. This not only involves painting a more accurate picture of the objective (technical) quality, but also of the subjective quality (i.e. perceived by the customer). This is referred to as the "quality in use approach".

### ***Highlighting multilingualism***

Language does not form a barrier for companies currently doing Euregional business and seems only to present a small obstacle to those companies not yet trading in the Euregio. In this respect it should be noted that Euregional trade is more intensive in same-language regions than between regions where the language differs. However, the Dutch and German languages do not present any problems for companies operating in the Euregio. This is not the case with French. The education systems in the Euregio will have to pay more attention to these languages, and in particular French. Additionally, the Chambers of Commerce may point out the importance and availability of language courses in the region. It is of course desirable for international trade advisors at the Chambers of Commerce to have an active command of all three languages. The five chambers should therefore be tri-lingual and

market information needs to be made available in the three different languages.

### ***Euregional lobby***

Although the Euregio might form the domestic market for companies based in the Euregio Meuse-Rhine, in practice this is not entirely the case. A domestic market is characterised by a single uniform system of taxes and regulations. The five participating chambers of commerce, collectively, will have to lobby hard for harmonisation between the three countries and continue arguing strongly for a 'special status' for the Euregio Meuse-Rhine with the national governments and the EU. The introduction of the euro has made international trade easier. Traditional factors, such as differences in language and culture, which impede international trade, play a much less significant role here. Now it is important to iron out the differences in regulations and tax systems, or at least lessen these.

### ***Formation of Euregional chains and clusters***

None of the aforementioned provides a solution for the fact that the Euregio is a relatively small region. The Chambers of Commerce are likewise unable to alter the market situation. However, what they can do is to contribute towards the formation of Euregional chains and clusters. This involves not only the setting up and maintaining of networks for companies not located in a single location, but also physically clustering demand and supply at dedicated Euregional business parks.

### Staat 0.1 Euregionale handel: export versus import

	Export	Import
Aandeel bedrijven	38%	36%
Aandeel buitenlandse handel in totale handel	27%	42%
Aandeel Euregionale handel in buitenlandse handel	22%	28%
Aandeel Euregionale handel in totale handel	6%	12%

## 0 SAMENVATTING, CONCLUSIES EN ADVIEZEN

### 0.1 Samenvatting

#### *Algemeen*

Ongeveer 40% van de bedrijven in de Euregio exporteert naar en ruim een derde importeert uit buitenlandse markten over de gehele wereld. Bijna alle exporterende bedrijven exporteren ook naar de Euregio; ongeveer 6% van hun totale omzet wordt gerealiseerd via export naar de Euregio. Niet alle importerende bedrijven importeren uit de Euregio; 12% van de totale inkoop van de bedrijven die uit de Euregio importeren, wordt gerealiseerd via import uit de Euregio.

Bedrijven uit Belgisch Limburg exporteren het meeste naar en importeren het meeste uit de Euregio. Dat er relatief veel Euregionaal gehandeld wordt door bedrijven in Belgisch Limburg is niet verwonderlijk, daar de meeste bedrijven Vlaanderen als hun thuishandelsmarkt beschouwen. Dit heeft twee gevolgen. Ten eerste is deze thuishandelsmarkt zo klein, dat bedrijven al snel worden gedwongen om over te gaan op export en/of import. Ten tweede wordt hierdoor niet alleen de handel met het Nederlandse Zuid-Limburg en de Regio Aachen, maar ook het zaken doen in Wallonië (vaak als Euregionale handel beschouwd). Het voorgaande geldt eveneens voor de bedrijven in de Provincie Luik. Deze beschouwen Wallonië en niet heel België als hun thuishandelsmarkt. Dat deze bedrijven echter minder Euregionaal handelen dan de bedrijven in Belgisch Limburg, komt vooral doordat de handelsrelaties in de Provincie Luik meer op Frankrijk dan op het Nederlandse en Duitse gedeelte van de Euregio gericht zijn. Qua percentage bedrijven is de internationale handel het laagste in Zuid-Limburg en in de Regio Aachen. Wellicht dat in de Regio Aachen hierbij de grote Duitse thuishandelsmarkt ook een rol speelt.

Twee van de drie Euregionaal exporterende bedrijven doen dat via directe verkoop (direct sales) en één op de vijf maakt gebruik van tussenpersonen. Negen op de tien Euregionaal importerende bedrijven doen dat via directe import.

Blijkbaar kunnen bedrijven de verschillen bij het internationaal zaken doen in de Euregio zelf lastiger overbruggen bij het exporteren dan bij importeren, waardoor zij de hulp van tussenpersonen meer nodig hebben bij het exporteren dan bij het importeren.

#### *De Euregio als exportgebied*

Aan de hand van 17 onderwerpen zijn de *attractieve en minder attractieve kanten* van de Euregio als exportgebied in kaart gebracht. De bedrijven oordelen vooral positief over de geringe geografische afstand die maar hoeft te worden overbrugd; dit maakt de levertijden kort. Men beoordeelt de Euregio als minder aantrekkelijk vanwege het kleine marktgebied waarin veel concurrenten zijn en waar een grote druk op de verkoopprijzen bestaat. Verschillen in taal en cultuur worden weinig als een probleem ervaren; immers, de bedrijven zijn bekend in de grensregio's en men weet hier mee om te gaan, zeker als men eenmaal over de grens zaken doet. Overigens blijkt dat de meeste handelsrelaties zich (toch) voordoen tussen die gebieden waar de taal vrijwel hetzelfde is; het Duits is geen probleem voor bedrijven in Belgisch en Nederlands Limburg. Zaken doen in het Franstalige deel van de Euregio is veel lastiger, maar ook dat blijkt mee te vallen als bedrijven er eenmaal zaken doen. Ten aanzien van de verschillen in wet- en regelgeving en in fiscaal regime beoordelen de bedrijven de Euregio net zo als andere buitenlandse markten (het is begrijpelijk dat dit onderwerp niet speelt bij de handel tussen Wallonië en Vlaanderen).

Op basis van een lijst met elf mogelijke *barrières* om te exporteren in de Euregio blijkt dat er per saldo amper barrières zijn. Het vinden van de juiste handelspartners levert relatief gezien dan nog de meeste problemen op. Per saldo zijn de verschillen in taal, cultuur, wet, regelgeving en fiscaal regime geen barrières (meer) wanneer men eenmaal exporteert in de Euregio. Dan blijkt er ook voldoende marktinformatie te zijn.

## Staat 0.2 De attractiviteit van de Euregio als export- en importgebied

	Export (figuur 3.4)*	Import (figuur 4.4)**
Meest aantrekkelijke aspecten (top 3)	Levertijden (+) Relatiebeheer (+) Serviceverlening (+)	Soort aanbieders (+) Betere kwaliteit (+) Levertijden (+)
Minst aantrekkelijke aspecten (top 3)	Concurrentie (-) Verkoopprijzen (-) Fiscale verschillen (o)	Fiscale verschillen (-) Wet- en regelgeving (-) Inkoopprijzen (+)

NB. Betreft uitsluitend het oordeel van bedrijven die Euregionaal exporteren (\*) en/of importeren (\*\*)

*Het begrip 'minst aantrekkelijk' is nadrukkelijk niet hetzelfde als 'onaantrekkelijk'. Ter illustratie: bij de minst aantrekkelijke aspecten van de Euregio als importgebied staat ook het aspect 'inkoopprijzen'. Dit betekent niet dat de ondernemers de Euregio een onaantrekkelijk importgebied vinden vanwege de hoogte van de inkoopprijzen in de Euregio. Als de inkoopprijzen in de Euregio worden afgezet tegen de inkoopprijzen elders, scoort de Euregio zelfs nog relatief goed. Op de meeste andere aspecten scoort de Euregio echter gewoon (nog) beter.*

*Aspecten die in groen zijn afgedrukt en waaraan een plusteken (+) is toegevoegd, zijn aspecten waar de Euregio zich in positieve zin onderscheidt van andere handelsgebieden. Aspecten die in oranje zijn afgedrukt en waaraan een nulteken (0) is toegevoegd, zijn aspecten waar de Euregio zich niet onderscheidt van andere handelsgebieden. Alleen als een aspect in het rood is afgedrukt en er een minteken (-) achter staat, is de Euregio voor dat betreffende aspect onaantrekkelijk in vergelijking met andere handelsgebieden.*

In het onderzoek zijn 17 *motieven om niet naar de Euregio te exporteren*, voorgelegd aan bedrijven die niet naar de Euregio exporteren. Een van de motieven om dit niet te doen ligt in het niet kunnen vinden van de juiste marktinformatie en een ander motief betreft de - andere - taal. Argumenten als het niet kunnen garanderen van betrouwbare leveringen, niet snel te kunnen leveren, geen adequaat serviceniveau te kunnen leveren, te hoge transportkosten of de noodzaak om tussenpersonen te moeten gebruiken, worden per saldo niet genoemd als barrières. Deze aspecten die typisch met lange afstanden verband houden, gelden dus niet voor de bedrijven die (nog) niet Euregionaal exporteren om niet in de Euregio te exporteren.

### ***De Euregio als importgebied***

Aan de hand van een lijst van 16 onderwerpen zijn de *attractieve en minder attractieve kanten* van de Euregio als importgebied in kaart gebracht. In het algemeen vindt men de Euregio als importgebied wat attractiever dan andere internationale importmarkten. Men is positief over de aanwezigheid van de juiste aanbieders die de juiste kwaliteit op een betrouwbare wijze leveren. Men is negatief over de verschillen in wet- en regelgeving en fiscale zaken.

Een elftal *barrières* zijn genoemd die zich zouden kunnen voordoen bij het importeren vanuit de Euregio. Per saldo zijn dergelijke barrières er niet. Men noemt in dit verband de verschillen in cultuur, taal, fiscaal regime en de eventueel niet aanwezige marktinformatie, niet als barrières. Bij het feitelijk zaken doen, worden deze onderwerpen niet (meer) als een barrière ervaren. Eventuele barrières zouden zich voor kunnen doen bij onduidelijkheden over de kwaliteitsstandaarden; deze worden soms als te hoog en soms als te laag gepercipieerd.

Aan de bedrijven die niet uit de Euregio importeren is gevraagd welke *motieven om niet te importeren uit de Euregio* voor hen gelden. Wellicht gelden per saldo als motieven om niet te importeren de moeilijk te vinden marktinformatie en het feit dat niet altijd de juiste aanbieders aanwezig zijn. De volgende motieven gelden niet als motief om niet uit de Euregio te importeren: onmogelijk om snel te leveren, onmogelijk om goede serviceniveau te leveren, teveel cultuurverschillen, teveel investeringen nodig (bijvoorbeeld in tussenpersonen).

## **0.2 Conclusies**

De Euregio is net als elk ander internationaal handelsgebied een gewone internationale markt. Zo zijn er bijvoorbeeld nog grote fiscale verschillen en verschillen in wet- en regelgeving binnen de Euregio. Naast een gewone internationale markt is de Euregio echter tegelijkertijd ook te beschouwen als een thuismarkt. Het is in geografisch opzicht overigens wel een relatief kleine markt. Veel van de voordelen van deze markt hebben dan ook met het afstandscriterium te maken.

De Euregio is een markt met aantrekkelijke en minder aantrekkelijke kanten. Zowel exporteurs als importeurs benadrukken als aantrekkelijke kant de betrouwbare leveringen, korte levertijden en juiste kwaliteiten. Voor exporterende bedrijven wordt de onaantrekkelijkheid gevormd door de vele concurrenten en de druk op de verkoopprijzen; voor importerende bedrijven is het een aantrekkelijke importmarkt vanwege de relatief lage inkooprijzen en goede kwaliteit.

Naast een gewone markt, is de Euregio in een aantal opzichten ook een bijzondere (internationale) markt. Het is qua geografisch gebied en qua aantallen bedrijven een relatief kleine markt vergeleken met wereldmarkten. Afnemers en aanbieders zijn vlakbij, vragen c.q. leveren de juiste kwaliteiten en vooral de levertijden alsmede de leveringsbetrouwbaarheid worden als een zeer positief punt genoemd. Taal- en cultuurverschillen lijken geen rol meer te spelen wanneer bedrijven eenmaal over de landsgrenzen heen zaken (zijn gaan) doen; de verschillen in wet- en regelgeving en in fiscale regimes blijven wel bestaan. Daar kan men - ondanks alle pogingen tot harmonisatie van wetgeving op Europees niveau - in de regio zelf niets aan doen, aangezien dit gebaseerd is op landelijk genomen beslissingen.

De meeste bedrijven verrichten de export- en importactiviteiten in de Euregio zelf. Bij exporteren maken de Euregionale bedrijven overigens meer gebruik van tussenpersonen dan bij het importeren. Het exporteren, het vinden van de exportmarkt of het vinden van de juiste afnemers is blijkbaar lastiger dan het importeren. Buitenlandse leveranciers in de Euregio zijn blijkbaar makkelijker te vinden dan buitenlandse afnemers in de Euregio.

### Staat 0.3 Handelsbarrières binnen de Euregio

	Export (figuur 3.5)*	Import (figuur 4.5)**
Relatief klein belemmering (top 3)	Samenwerkingspartners (+) Cultuurverschillen (+) Taalverschillen (+)	Levertijden (+) Serviceverlening (+) Cultuurverschillen (+)
Relatief grote belemmering (top 3)	Verkoopprijzen (-) Concurrentie (+) Te hoge kwaliteitseisen (+)	Te hoge kwaliteit (+) Te lage kwaliteit (+) Inkoopprijzen (+)

NB. Betreft uitsluitend het oordeel van bedrijven die Euregionaal exporteren (\*) en/of importeren (\*\*)

*Het begrip 'relatief grote belemmering' is nadrukkelijk niet hetzelfde als 'een onoverkomelijke barrière'. Ter illustratie: de verkoopprijzen in de Euregio worden per saldo door de exporterende ondernemers als een (overigens beperkte) exportbarrière beschouwd. Dat wil zeggen dat er (iets) meer exporterende ondernemers van mening zijn dat de verkoopprijzen een exportbarrière vormen, dan dat er exporterende ondernemers zijn die vinden dat de verkoopprijzen géén barrière vormen. Daarnaast vindt ook een relatief groot deel van de exporterende ondernemers dat de concurrentie in de Euregio een exportbarrière. Een (kleine) meerderheid van exporterende ondernemers is echter van mening dat de concurrentie géén exportbarrière vormt.*

*Aspecten die in groen zijn afgedrukt en waaraan een plusteken (+) is toegevoegd, vormen voor een meerderheid van de ondernemers géén handelsbarrière. Alleen als een aspect in het rood is afgedrukt en er een minteken (-) achter staat, is een meerderheid van de ondernemers van mening dat het betreffende aspect een handelsbarrière vormt.*

Het vinden van het juiste kwaliteitsniveau is voor de daadwerkelijk uit de Euregio importerende bedrijven nog wel eens een bijzonder probleem, namelijk een probleem waarbij de kwaliteit soms te hoog is voor wat men zoekt en soms te laag is.

Het vinden van de juiste marktinformatie lijkt een iets grotere barrière te zijn voor de nog niet naar de Euregio exporterende bedrijven dan voor de bedrijven die nog niet uit de Euregio importeren. Bedrijven die Euregionaal zaken doen, geven aan dat het verkrijgen van marktinformatie in de praktijk wel meevalt.

### 0.3 Adviezen

'De Euregio Maas-Rijn: uw internationale thuismarkt!' dient volgens Etil het centrale thema te vormen bij het Euregionale handelsbeleid van de Euregionale Kamers van Koophandel.

Dankzij de goede (inter)nationale wegbindingen (E25, E40, E313 en E314) kunnen de bedrijven in de Euregio Maas-Rijn volop profiteren van de geringe afstanden binnen de Euregio; zij het dat de noord-zuid verbinding nog voor verbetering vatbaar is. De fysieke nabijheid biedt namelijk veel (mogelijke) voordelen, zoals korte levertijden, hoge leverbetrouwbaarheid, lage transportkosten en goede serviceverlening. Daarnaast hebben de geringe afstanden tot voordeel dat de bestaande cultuurverschillen in de praktijk op Euregionaal niveau vaak kleiner zijn dan op nationaal niveau. De fysieke nabijheid en de geringe cultuurverschillen hebben als aanvullende voordeel dat ondernemers direct - en dus zonder tussenpersonen en/of grote investeringen - handel kunnen drijven in de Euregio. Althans als men de taal van de burens spreekt of op z'n minst redelijk verstaat. Ook het verkrijgen van de juiste marktinformatie wordt dan makkelijker. Door de bovenstaande kenmerken van de Euregio, vormt de Euregio de ideale springplank voor ondernemers in de Euregio die door export internationaal willen expanderen.

De genoemde voordelen worden echter nog niet volledig onderkend noch benut. Deels komt dit door de taalverschillen, maar wat vooral belemmerend werkt zijn de nog relatief grote fiscale verschillen en verschillen in wet- en regelgeving. Op die punten vormt de Euregio Maas-Rijn absoluut nog géén thuismarkt voor de bedrijven in de deelregio's, maar moet de Euregionale handel helaas nog steeds gezien worden als export en import en verschilt de Euregionale handel niet of nauwelijks van de internationale handel in het algemeen.

#### ***Communicatie: de Euregio als internationale thuismarkt positioneren***

De Kamers van Koophandel dienen duidelijk te communiceren dat handel drijven in de Euregio een aantrekkelijke aangelegenheid is. Net als elke andere internationale markt spelen er weliswaar verschillen in wet- en regelgeving en fiscaal regime, maar verschillen in taal en cultuur spelen veel minder een rol dan op andere internationale markten. Hierdoor en door de geringe afstanden, kan ook gemakkelijker direct vanuit de thuisbasis gehandeld worden, zonder tussenpersonen en/of extra investeringen. Het onderzoek geeft aanknopingspunten voor actie gericht op het thema 'De Euregio Maas-Rijn: uw thuismarkt!'. Immers, de juiste leveranciers en afnemers zijn aanwezig in dit relatief kleine gebied. Het beeld van een internationale thuismarkt met relatief lage transportkosten waarbij de juiste klanten en leveranciers met de gewenste kwaliteiten, leveringen en leveringsbetrouwbaarheid dichtbij te vinden zijn maar zonder echte taal- en cultuurverschillen, dient gecreëerd te worden.

#### ***(Deels) verleggen van de aandacht van export naar import***

De Euregio is een aantrekkelijke importmarkt met lage prijzen, lage transportkosten, juiste leveranciers, goede kwaliteit en snelle, betrouwbare leveringen. Het is dientengevolge ook begrijpelijk dat deze markt als exportmarkt wat minder aantrekkelijk is: veel concurrenten en een druk op de prijzen voor de naar de Euregio exporterende bedrijven. Dit beeld van de Euregio dient nadrukkelijker geschetst te worden om de juiste typering van de (thuis)markt goed te laten overkomen. Hierbij kan de nadruk in eerste instantie zelfs komen te liggen op de aantrekkelijke importmarkt.

## Staat 0.4 Motieven om géén Euregionale handel te voeren

	Export (figuur 3.6)*	Import (figuur 4.6)**
Relatief onbelangrijk motief (top 3)	Leverbetrouwbaarheid (+) Levertijden (+) Serviceverlening (+)	Levertijden (+) Serviceverlening (+) Cultuurverschillen (+)
Relatief belangrijk motief (top 3)	Marktinformatie (-) Taalverschillen (+) Soort afnemers (+)	Marktinformatie (+) Soort aanbieders (+) Taalverschillen (+)

NB. Betreft uitsluitend het oordeel van bedrijven die niet Euregionaal exporteren (\*) en/of importeren (\*\*)

*Het begrip 'relatief belangrijk motief' is nadrukkelijk niet hetzelfde als 'een doorslaggevend motief'. Ter illustratie: er zijn relatief veel ondernemers die vanwege de taalverschillen afzien van Euregionale handel, maar voor een meerderheid van de ondernemers vormen de taalverschillen géén motief om af te zien van Euregionale handel.*

*Aspecten die in groen zijn afgedrukt en waaraan een plusteken (+) is toegevoegd, vormen voor een meerderheid van de ondernemers géén motief om af te zien van Euregionale handel. Alleen als een aspect in het rood is afgedrukt en er een minteken (-) achter staat, vormt dat aspect voor een meerderheid van de ondernemers een motief om af te zien van Euregionale handel.*

### ***Aanpakken van mispercepties: 'telling the succes stories'***

Bedrijven die geen Euregionale handel verrichten denken dat er veel - voor hen niet te beïnvloeden - verschillen zijn (taal, cultuur, fiscus, wet- en regelgeving) waardoor het ook moeilijk is om goede marktinformatie te vinden en te krijgen. In de praktijk van alledag blijkt dit mee te vallen, zeggen de bedrijven die wel daadwerkelijk zaken doen in de Euregio. De Kamers dienen deze vooroordelen en mispercepties weg te nemen. Dat kan via gerichte communicatiecampagnes, door bedrijven die om marktinformatie vragen, maatwerk te leveren en door voorbeeld-bedrijven hun 'succes story' te laten vertellen.

### ***Aandacht voor kwaliteitsperceptie***

Bedrijven in de Regio Aachen en in het Duitstalige deel van de Provincie Luik menen nog wel eens dat hun kwaliteiten niet goed (dat wil zeggen te laag of te hoog) worden beoordeeld door de bedrijven in de andere delen van de Euregio. Gerichte acties dienen ondernomen te worden om de juiste kwaliteitsperceptie te creëren. Het gaat dan niet alleen om het juiste beeld te schetsen van de objectieve (technische) kwaliteit, maar ook van de subjectieve (door de afnemer gepercipieerde) kwaliteit ("quality in use" - benadering).

### ***Aandacht voor meertaligheid***

De taal vormt voor ondernemers die Euregionaal handelen géén barrière en voor ondernemers die niet Euregionaal handelen ogenschijnlijk slechts een kleine barrière. Hierbij dient echter direct aangetekend te worden dat in de praktijk de Euregionale handel binnen taalgebieden groter is dan tussen de verschillende taalgebieden. De Nederlandse en Duitse taal lijken geen problemen op te leveren voor de Euregionaal werkende bedrijven. Het Frans daarentegen wel. De drie talen (en dan met name het Frans) zullen meer aandacht moeten krijgen in het onderwijs in de Euregio. Daarnaast kunnen de Kamers van Koophandel wijzen op het belang van en aanbod aan taalcursussen. Daarnaast is het uiteraard wenselijk dat de consulenten internationale handel bij de Kamers van Koophandel alle drie de talen actief beheersen. De vijf Kamers zullen drietalig moeten worden en ook de marktinformatie dient in drie talen beschikbaar te zijn.

### ***Euregionale lobby***

Hoewel de Euregio de thuismarkt voor de bedrijven in de Euregio Maas-Rijn kan gaan vormen, is deze dat in de praktijk zeker nog niet helemaal. Kenmerkend voor een thuismarkt is immers dat er géén (grote) fiscale verschillen en verschillen in wet- en regelgeving bestaan. De vijf Kamers moeten hun gezamenlijk lobby voor harmonisatie tussen de drie betrokken landen en een 'status aparte' voor de Euregio Maas-Rijn richting de nationale regeringen en de EU dus krachtig blijven voortzetten. De introductie van de euro heeft de internationale handel vergemakkelijkt. Traditionele factoren als taal- en cultuurverschillen die internationale handel bemoeilijken, lijken hier al minder een rol te spelen. Nu wordt het van belang de nog resterende verschillen in wet- en regelgeving en fiscale regime weg te nemen, dan wel op zijn minst te verminderen.

### ***Euregionale keten- en clustervorming***

Het voorgaande vormt uiteraard geen oplossing voor het feit dat de Euregio een relatief kleine markt vormt. De Kamers van Koophandel kunnen deze marktsituatie ook niet veranderen. Wel kunnen de Kamers van Koophandel een bijdrage blijven leveren aan verdergaande Euregionale keten- en clustervorming. Het betreft zowel het oprichten en onderhouden van netwerken van bedrijven die niet op één locatie gevestigd zijn als het fysiek clusteren van vraag en aanbod op Euregionale thematische bedrijventerreinen.

## Übersicht 0.1 Euregionaler Handel: Export gegenüber Import

	Export	Import
Anteil der Betriebe	38%	36%
Anteil des Außenhandels am gesamten Handel	27%	42%
Anteil des euregionalen Handels am Außenhandel	22%	28%
Anteil des euregionalen Handels am gesamten Handel	6%	12%

## 0 ZUSAMMENFASSUNG, SCHLUSSFOLGERUNGEN UND EMPFEHLUNGEN

### 0.1 Zusammenfassung

#### *Allgemeines*

Ungefähr 40% der Betriebe in der Euregio exportieren in ausländische Märkte und mehr als ein Drittel importiert aus ausländischen Märkten in der ganzen Welt. Nahezu alle exportierenden Betriebe exportieren auch in die Euregio; ungefähr 6% ihres gesamten Umsatzes werden über den Export in die Euregio realisiert. Nicht alle importierenden Betriebe importieren aus der Euregio; 12% des gesamten Einkaufs der Betriebe, die aus der Euregio importieren, werden über den Import aus der Euregio realisiert.

Betriebe aus Belgisch Limburg exportieren das Meiste in die und importieren das Meiste aus der Euregio. Dass von den Betrieben in Belgisch Limburg relativ viel euregional gehandelt wird, ist nicht verwunderlich, da die meisten Betriebe Flandern als ihren Heimatmarkt ansehen. Dies hat zwei Folgeerscheinungen. Erstens ist dieser Heimatmarkt so klein, dass die Betriebe bereits schnell gezwungen sind, auf den Export und/oder Import überzugehen. Zweitens wird hierbei nicht nur der Handel mit dem niederländischen Süd-Limburg und dem Kammerbezirk Aachen, sondern auch das Geschäftsleben in Wallonien (häufig) als euregionaler Handel angesehen. Das Vorstehende gilt ebenso für die Betriebe in der Provinz Lüttich. Diese betrachten Wallonien und nicht ganz Belgien als ihren Heimatmarkt. Dass diese Betriebe jedoch weniger euregional handeln als die Betriebe in Belgisch Limburg, kommt in erster Linie daher, dass die Handelsbeziehungen in der Provinz Lüttich mehr auf Frankreich, als auf den niederländischen und den deutschen Teil der Euregio ausgerichtet sind. Bezogen auf den Anteil der Betriebe ist der internationale Handel in Süd-Limburg und im Kammerbezirk Aachen am geringsten. Vielleicht, weil im Kammerbezirk Aachen hierbei der große deutsche Heimatmarkt auch eine Rolle spielt.

Zwei von drei euregional exportierenden Betrieben tun das über den direkten Verkauf (direct sales) und einer von fünf setzt Vermittler ein.

Neun von zehn euregional importierenden Betrieben tun das über den direkten Import.

Offenbar können die Betriebe die Unterschiede im internationalen Geschäftsleben in der Euregio beim Exportieren selbst schwieriger überbrücken als beim Importieren, weswegen sie die Hilfe von Vermittlern beim Exportieren mehr brauchen, als beim Importieren.

#### *Die Euregio als Exportgebiet*

Anhand von 17 Aspekten sind die *attraktiven und weniger attraktiven Seiten* der Euregio als Exportgebiet inventarisiert worden. Die Betriebe urteilen in erster Linie positiv über die geringe geographische Entfernung innerhalb der Euregio; dies sorgt für kurze Lieferzeiten. Man beurteilt die Euregio als weniger attraktiv wegen des kleinen Marktgebiets, in dem es viele Konkurrenten gibt und in dem ein großer Druck auf die Verkaufspreise besteht. Die Unterschiede in der Sprache und Kultur werden weniger als ein Problem angesehen; schließlich kennen sich die Betriebe in den Grenzregionen aus und man versteht es, hiermit umzugehen, sicher wenn man einmal über die Grenze hinweg Geschäfte macht. Übrigens zeigt sich, dass sich die meisten Handelsbeziehungen (doch) zwischen jenen Gebieten ergeben, in denen die Sprache fast dieselbe ist; die deutsche Sprache ist kein Problem für die Betriebe in Belgisch- und Niederländisch-Limburg. Geschäfte zu machen im französischen Teil der Euregio ist viel schwieriger, aber auch das scheint nicht so schwer zu sein, wenn die Betriebe erst einmal Geschäftsbeziehungen aufgenommen haben. Hinsichtlich der Unterschiede bei den Gesetzen und der Regelsetzung sowie bei den Steuersystemen beurteilen die Betriebe die Euregio ebenso wie die anderen ausländischen Märkte (es ist verständlich, dass dieses Thema beim Handel zwischen Wallonien und Flandern keine Rolle spielt).

Auf der Grundlage einer Liste mit elf möglichen *Hemmnissen* dafür, in die Euregio zu exportieren, zeigt sich, dass es per saldo kaum Hemmnisse gibt. Das Finden des richtigen Handelspartners stellt dabei relativ gesehen noch das größte Problem dar. Per saldo sind die Unterschiede in der Sprache, der Kultur, den Gesetzen, der Regelsetzung und der steuerlichen Behandlung keine Hemmnisse (mehr), wenn man einmal in die Euregio exportiert. Dann scheint es auch eine ausreichende Marktinformation zu geben.

## Übersicht 0.2 Die Attraktivität der Euregio als Export- und Importgebiet

	Export (Abbildung 3.4)*	Import (Abbildung 4.4)**
Die attraktivsten Aspekte (Top 3)	Lieferzeiten (+) Kundenbetreuung (+) Dienstleistung (+)	Art der Anbieter (+) Bessere Qualität (+) Lieferzeiten (+)
Die am wenigsten attraktiven Aspekte (Top 3)	Konkurrenz (-) Verkaufspreise (-) Steuerliche Unterschiede (o)	Steuerliche Unterschiede (-) Gesetze und Regelung (-) Einkaufspreise (+)

Anmerkung: Betrifft ausschließlich das Urteil der Betriebe, die euregional exportieren (\*) und/oder importieren (\*\*)

Der Begriff 'am wenigsten attraktiv' ist ausdrücklich nicht derselbe wie 'unattraktiv'. Zur Erläuterung: bei den am wenigsten attraktiven Aspekten der Euregio als Importgebiet steht auch der Aspekt 'Einkaufspreise'. Dies bedeutet nicht, dass die Unternehmer die Euregio wegen der Höhe der Einkaufspreise in der Euregio für ein unattraktives Importgebiet halten. Wenn die Einkaufspreise in der Euregio für ein unattraktives Importgebiet anderswo betrachtet werden, schneidet die Euregio sogar noch relativ gut ab. Bei den meisten anderen Aspekten schneidet die Euregio jedoch einfach (noch) besser ab.

Aspekte, die grün ausgedruckt sind und denen ein Pluszeichen (+) angefügt ist, sind Aspekte, in denen sich die Euregio im positiven Sinne von anderen Handelsgebieten unterscheidet. Aspekte, die orange ausgedruckt sind und denen eine Null (0) angefügt ist, sind Aspekte, in denen sich die Euregio nicht von anderen Handelsgebieten unterscheidet. Nur wenn ein Aspekt rot ausgedruckt ist und ein Minuszeichen (-) dahinter steht, ist die Euregio in diesem betreffenden Aspekt unattraktiv im Vergleich zu anderen Handelsgebieten.

In der Untersuchung sind 17 *Motive, nicht in die Euregio zu exportieren*, denjenigen Betrieben vorgelegt worden, die nicht in die Euregio exportieren. Eines der Motive, dies nicht zu tun, liegt darin, keine richtige Marktinformation finden zu können und ein anderes Motiv betrifft die - andere - Sprache. Argumente, wie zuverlässige Lieferungen nicht garantieren zu können, nicht schnell genug liefern zu können, kein adäquates Serviceniveau liefern zu können, zu hohe Transportkosten oder die Notwendigkeit, auf Vermittler zurückgreifen zu müssen, werden per saldo nicht als Hemmnisse genannt. Diese Aspekte, die typischerweise mit den weiten Entfernungen zusammenhängen, sind also kein Exporthemmnis für die Betriebe, die (noch) nicht euregional exportieren.

### ***Die Euregio als Importgebiet***

Anhand einer Liste von 16 Aspekten sind die *attraktiven und die weniger attraktiven Seiten* der Euregio als Importgebiet inventarisiert worden. Im allgemeinen findet man die Euregio als Importgebiet etwas attraktiver als andere internationale Importmärkte. Man denkt positiv über das Vorhandensein der richtigen Anbieter, die die richtige Qualität auf zuverlässige Weise liefern. Man denkt negativ über die Unterschiede bei den Gesetzen und der Regelungsetzung sowie auf dem steuerlichen Gebiet.

Ferner sind elf Hemmnisse genannt worden, die sich beim Importieren aus der Euregio ergeben könnten. Per saldo gibt es derartige Hemmnisse nicht. Man nennt in diesem Zusammenhang nicht als Hemmnisse die Unterschiede in der Kultur und Sprache, im Steuersystem und bei den eventuell nicht vorhandenen Marktinformationen. Bei der tatsächlichen Abwicklung der Geschäfte, werden diese Themen nicht (mehr) als Hemmnisse erfahren. Eventuelle Hemmnisse könnten sich bei Unklarheiten über die Qualitätsstandards ergeben; diese werden manchmal als zu hoch und manchmal als zu niedrig wahrgenommen.

Die Betriebe, die nicht aus der Euregio importieren, sind gefragt worden, aus welchen Gründen sie *nicht aus der Euregio importieren*. Vielleicht gelten per saldo als Motive nicht zu importieren die schwierig zu findenden Marktinformationen und die Tatsache, dass nicht immer die richtigen Anbieter vorhanden sind. Die folgenden Motive gelten nicht als Motiv, nicht aus der Euregio zu importieren: es ist unmöglich, schnell zu liefern; es ist unmöglich, ein gutes Serviceniveau zu liefern, zu viele Kulturunterschiede, zu viele Investitionen erforderlich (z. B. in die Vermittler).

## **0.2 Schlussfolgerungen**

Die Euregio ist genau wie jedes andere internationale Handelsgebiet ein normaler internationaler Markt. So gibt es zum Beispiel noch große steuerliche Unterschiede und Unterschiede bei den Gesetzen und der Regelungsetzung in der Euregio. Außer als ein normaler internationaler Markt ist die Euregio jedoch auch als ein Heimatmarkt anzusehen. Aus geographischer Sicht ist es übrigens eher ein relativ kleiner Markt. Viele der Vorteile dieses Marktes hängen daher auch mit dem Entfernungskriterium zusammen.

Die Euregio ist ein Markt mit attraktiven und weniger attraktiven Seiten. Sowohl die Exporteure, als auch die Importeure bezeichnen die zuverlässigen Lieferungen, die kurzen Lieferzeiten und die richtige Qualität als die attraktive Seite. Für die exportierenden Betriebe zeigt sich die Unattraktivität bei den vielen Konkurrenten und dem Druck auf die Verkaufspreise; für die importierenden Betriebe ist es wegen der relativ niedrigen Einkaufspreise und der guten Qualität ein attraktiver Importmarkt.

Außer einem normalen Markt ist die Euregio in mehreren Hinsichten auch ein besonderer (internationaler) Markt. Es ist geographisch und an der Zahl der Betriebe gemessen ein relativ kleiner Markt im Vergleich zu den Weltmärkten. Die Abnehmer und Anbieter befinden sich in der Nähe, verlangen bzw. liefern die richtige Qualität und insbesondere die Lieferzeiten und die Lieferzuverlässigkeit werden als sehr positive Punkte genannt. Die Sprach- und Kulturunterschiede scheinen keine Rolle mehr zu spielen, wenn die Betriebe erst einmal über die Landesgrenzen hinweg Geschäfte miteinander machen oder gemacht haben; die Unterschiede bei den Gesetzen und der Regelungsetzung sowie bei den Steuersystemen bleiben jedoch bestehen. Daran kann man - trotz aller Anstrengungen zur Harmonisierung der Gesetzgebung auf europäischer Ebene - in der Region selbst nichts tun, da diese auf den national getroffenen Entscheidungen beruhen.

## Übersicht 0.3 Handelshemmnisse in der Euregio

	Export (Abbildung 3.5)*	Import (Abbildung 4.5)**
Relativ kleine Hemmnisse (Top 3)	Geschäftspartner (+) Kulturunterschiede (+) Sprachunterschiede (+)	Lieferzeiten (+) Dienstleistung (+) Kulturunterschiede (+)
Relativ große Hemmnisse (Top 3)	Verkaufspreise (-) Konkurrenz (+) Zu hohe Qualitätsanforderungen (+)	Zu hohe Qualität (+) Zu geringe Qualität (+) Einkaufspreise (+)

Anmerkung: Betrifft ausschließlich das Urteil der Betriebe, die euregional exportieren (\*) und/oder importieren (\*\*)

*Der Begriff 'relativ großes Hemmnis' ist ausdrücklich nicht derselbe wie 'ein unüberwindliches Hemmnis'. Zur Erläuterung: die Verkaufspreise in der Euregio werden per saldo von den exportierenden Unternehmern als ein (übrigens begrenztes) Exporthemmnis angesehen. Das heißt, dass (etwas) mehr exportierende Unternehmer der Meinung sind, dass die Verkaufspreise ein Exporthemmnis bilden, als es exportierende Unternehmer gibt, die meinen, dass die Verkaufspreise kein Hemmnis bilden. Darüber hinaus hält auch ein relativ großer Teil der exportierenden Unternehmer die Konkurrenz in der Euregio für ein Exporthemmnis. Eine (kleine) Mehrheit der exportierenden Unternehmer ist aber der Meinung, dass die Konkurrenz kein Exporthemmnis darstellt.*

*Aspekte, die grün ausgedruckt sind und denen ein Pluszeichen (+) angefügt ist, stellen für die Mehrheit der Unternehmer kein Handelshemmnis dar. Nur wenn ein Aspekt rot ausgedruckt ist und ein Minuszeichen (-) dahinter steht, ist die Mehrheit der Unternehmer der Meinung, dass der betreffende Aspekt ein Handelshemmnis darstellt.*

Die meisten Betriebe führen die Export- und Importaktivitäten in der Euregio selbst durch. Beim Exportieren setzen die euregionalen Betriebe übrigens häufiger Vermittler ein, als beim Importieren. Das Exportieren, das Finden des Exportmarkts oder das Finden der richtigen Abnehmer ist offenbar schwieriger als das Importieren. Ausländische Lieferanten sind in der Euregio offenbar leichter zu finden als ausländische Abnehmer in der Euregio.

Das Finden des richtigen Qualitätsniveaus ist für die tatsächlich aus der Euregio importierenden Betriebe manchmal noch ein besonderes Problem, und zwar ein Problem, bei dem die Qualität manchmal zu hoch ist für das, was man sucht, und manchmal aber auch zu niedrig ist.

Das Finden der richtigen Marktinformation scheint ein etwas größeres Hemmnis für die noch nicht in die Euregio exportierenden Betriebe zu sein, als für die Betriebe, die noch nicht aus der Euregio importieren. Betriebe, die euregional Geschäfte machen, geben an, dass die Beschaffung von Marktinformationen in der Praxis nicht so schwierig ist.

### 0.3 Empfehlungen

‘Die Euregio Maas-Rhein: Ihr internationaler Heimatmarkt!’ muss nach der Auffassung von Etil das zentrale Thema der euregionalen Handelspolitik der euregionalen Industrie- und Handelskammern sein.

Dank der guten (inter)nationalen Straßenverbindungen (E25, E40, E313 und E314) können die Betriebe in der Euregio Maas-Rhein voll von den kurzen Entfernungen in der Euregio profitieren; wenn auch die Nord-Süd-Verbindung noch einige Verbesserungen vertragen kann. Die physische Nähe bietet nämlich viele (mögliche) Vorteile, wie kurze Lieferzeiten, hohe Lieferzuverlässigkeit, niedrige Transportkosten und gute Dienstleistungen. Darüber hinaus haben die kurzen Entfernungen den Vorteil, dass die existierenden Kulturunterschiede in der Praxis auf euregionaler Ebene oft kleiner sind als auf nationaler Ebene. Die physische Nähe und die geringen Kulturunterschiede haben den zusätzlichen Vorteil, dass Unternehmer direkt - und somit ohne Vermittler und/oder große

Investitionen - ihren Handel in der Euregio betreiben können. Zumindest, wenn man die Sprache des Nachbarn spricht oder wenigstens ausreichend gut versteht. Auch die Beschaffung der richtigen Marktinformationen wird dann leichter. Wegen der vorstehenden Merkmale der Euregio stellt die Euregio das ideale Sprungbrett für die Unternehmer in der Euregio dar, die durch Export international expandieren wollen.

Die genannten Vorteile werden jedoch bisher weder vollständig erkannt, noch genutzt. Zum Teil ergibt sich dies aus den Sprachunterschieden, aber als eine noch stärkere Behinderung wirken sich die noch relativ großen steuerlichen Unterschiede sowie die Unterschiede bei den Gesetzen und der Regelsetzung aus. In diesen Punkten formt die Euregio Maas-Rhein absolut noch keinen Heimatmarkt für die Betriebe in den Teilregionen, sondern der euregionale Handel muss leider immer noch als ein Export und Import betrachtet werden und der euregionale Handel unterscheidet sich nicht oder nur geringfügig von dem internationalen Handel im allgemeinen.

#### ***Kommunikation: die Euregio als internationalen Heimatmarkt positionieren***

Die Industrie- und Handelskammern müssen klar zum Ausdruck bringen, dass das Handeltreiben in der Euregio eine attraktive Sache ist. Ebenso wie auf jedem anderen internationalen Markt spielen zwar die Unterschiede bei den Gesetzen und der Regelsetzung sowie bei den Steuersystemen eine Rolle, aber die Unterschiede bei der Sprache und Kultur spielen eine viel geringere Rolle als auf den anderen internationalen Märkten. Hierdurch und wegen der kurzen Entfernungen kann der Handel auch leichter direkt aus dem Stammhaus betrieben werden, ohne Vermittler und/oder zusätzliche Investitionen. Die Untersuchung nennt Anknüpfungspunkte für Aktionen, die auf das Thema ‘Die Euregio Maas-Rhein: Ihr Heimatmarkt!’ ausgerichtet sind. Schließlich sind die richtigen Lieferanten und Abnehmer in diesem relativ kleinen Gebiet vorhanden. Das Bild eines internationalen Heimatmarktes mit relativ niedrigen Transportkosten, in dem die richtigen Kunden und Lieferanten mit den gewünschten Qualitäten sowie die Lieferungen und die Lieferzuverlässigkeit ganz in der Nähe zu finden sind, aber ohne gravierende Sprach- und Kulturunterschiede, muss geschaffen werden.

## Übersicht 0.4 Motive dafür, keinen euregionalen Handel zu betreiben

	Export (Abbildung 3.6)*	Import (Abbildung 4.6)**
Relativ unwichtiges Motiv (Top 3)	Lieferzuverlässigkeit (+) Lieferzeiten (+) Dienstleistung (+)	Lieferzeiten (+) Dienstleistung (+) Kulturunterschiede (+)
Relativ wichtiges Motiv (Top 3)	Marktinformation (-) Sprachunterschiede (+) Art der Abnehmer (+)	Marktinformation (+) Art der Anbieter (+) Sprachunterschiede (+)

Anmerkung: Betrifft ausschließlich das Urteil der Betriebe, die nicht euregional exportieren (\*) und/oder importieren (\*\*)

*Der Begriff 'relativ wichtiges Motiv' ist ausdrücklich nicht derselbe wie 'ein ausschlaggebendes Motiv'. Zur Erläuterung: es gibt relativ viele Unternehmer, die wegen der Sprachunterschiede von dem euregionalen Handel absehen, aber für die Mehrheit der Unternehmer stellen die Sprachunterschiede kein Motiv dar, von dem euregionalen Handel abzusehen.*

*Aspekte die grün ausgedruckt sind und denen ein Pluszeichen (+) angefügt ist, stellen für die Mehrheit der Unternehmer kein Motiv dar, von euregionalen Handel abzusehen. Nur wenn ein Aspekt rot ausgedruckt ist und ein Minuszeichen (-) dahinter steht, stellt dieser Aspekt für die Mehrheit der Unternehmer ein Motiv dar, von dem euregionalen Handel abzusehen*

### ***(Teilweise) Verlagerung der Aufmerksamkeit vom Export auf den Import***

Die Euregio ist ein attraktiver Importmarkt mit niedrigen Preisen, niedrigen Transportkosten, den richtigen Lieferanten, guter Qualität und schnellen, zuverlässigen Lieferungen. Es ist daher auch verständlich, dass dieser Markt als Exportmarkt etwas weniger attraktiv ist: es gibt viele Konkurrenten und einen starken Preisdruck bei den in die Euregio exportierenden Betrieben. Dieses Bild der Euregio muss nachdrücklicher skizziert werden, um den genauen Charakter des (Heimat)Marktes richtig darzustellen. Hierbei kann der Nachdruck sogar in erster Linie auf den attraktiven Importmarkt gelegt werden.

### ***Vorgehen gegen falsche Wahrnehmungen: 'telling the success stories'***

Betriebe, die keinen euregionalen Handel betreiben, denken, dass es viele - von Ihnen nicht zu beeinflussende - Unterschiede gibt (Sprache, Kultur, Steuern, Gesetze und Regelung) und dass es deshalb auch schwierig ist, gute Marktinformationen zu finden und zu beschaffen. In der täglichen Praxis scheint dies jedoch nicht so schwierig zu sein, sagen diejenigen Betriebe, die in der Euregio Geschäfte machen. Die Industrie- und Handelskammern müssen diese Vorurteile und falschen Wahrnehmungen beseitigen. Dies kann über zielgerichtete Kommunikationskampagnen geschehen, indem man den Betrieben, die sich nach Marktinformationen umsehen, ein maßgeschneidertes Angebot liefert und indem man vorbildliche Betriebe ihre 'Erfolgsgeschichte' erzählen lässt.

### ***Beachtung der Qualitätswahrnehmung***

Betriebe im Kammerbezirk Aachen und im deutschsprachigen Teil der Provinz Lüttich meinen gelegentlich, dass die von ihnen angebotene Qualität nicht richtig (das heißt zu niedrig oder zu hoch) von den Betrieben in den anderen Teilen der Euregio beurteilt wird. Es müssen gezielte Aktionen unternommen werden, um die richtige Qualitätserkennung zu schaffen. Es geht dann nicht nur darum, das richtige Bild der objektiven (technischen) Qualität aufzuzeichnen, sondern auch das der subjektiven, vom Abnehmer wahrgenommenen Qualität (der "quality in use" -Ansatz).

### ***Beachtung der Mehrsprachigkeit***

Die Sprache stellt für die Unternehmer, die euregional Handel betreiben, kein Hemmnis und für die Unternehmer, die keinen euregionalen Handel betreiben, offenbar nur ein kleines Hemmnis dar. Hierbei muss jedoch direkt angemerkt werden, dass in der Praxis der euregionale Handel innerhalb der Sprachgebiete größer ist, als zwischen den verschiedenen Sprachgebieten. Die niederländische und deutsche Sprache scheinen für die euregional arbeitenden Betriebe keine Probleme zu verursachen. Die französische Sprache dagegen wohl. Den drei Sprachen (insbesondere der französischen Sprache) muss in den Schulen in der Euregio mehr Aufmerksamkeit geschenkt werden. Darüber hinaus können die Industrie- und Handelskammern auf die Bedeutung eines Angebots an Sprachkursen hinweisen. Ferner ist es natürlich wünschenswert, dass die Berater im *internationalen Handel* bei den Industrie- und Handelskammern alle drei Sprachen aktiv beherrschen. Die fünf Industrie- und Handelskammern müssten dreisprachig werden und auch die Marktinformationen müssten in drei Sprachen zur Verfügung stehen.

### ***Euregionale Lobby***

Obwohl die Euregio den Heimatmarkt für die Betriebe in der Euregio Maas-Rhein bilden kann, ist ihr dies in der Praxis sicher noch nicht ganz gelungen. Das Kennzeichen eines Heimatmarktes ist es schließlich, dass es keine (großen) steuerlichen Unterschiede und keine Unterschiede bei den Gesetzen und der Regelung gibt. Die beteiligten fünf Kammern müssen ihre gemeinsame Lobby für die Harmonisierung zwischen den drei betroffenen Ländern und für einen 'Sonderstatus' für die Euregio Maas-Rhein bei den nationalen Regierungen und bei der EU also weiter kräftig fortsetzen. Die Einführung des Euro hat den internationalen Handel vereinfacht. Traditionelle Faktoren, wie die Sprach- und Kulturunterschiede, die den internationalen Handel erschweren, scheinen hier bereits weniger eine Rolle zu spielen. Jetzt rückt in den Mittelpunkt, die noch verbliebenen Unterschiede bei den Gesetzen und der Regelung sowie bei den Steuersystemen zu beseitigen, bzw. zumindest zu verringern.



### ***Euregionale Ketten- und Gruppenbildung***

Das Vorstehende ergibt selbstverständlich keine Lösung für die Tatsache, dass die Euregio einen relativ kleinen Markt bildet. Die Industrie- und Handelskammern können diese Marktsituation auch nicht verändern. Die Industrie- und Handelskammern können jedoch auch weiterhin einen Beitrag zur weitergehenden euregionalen Ketten- und Gruppenbildung leisten. Hierbei geht es sowohl um die Schaffung und Pflege von Netzen aus den Betrieben, die nicht an einem Ort niedergelassen sind, als auch um die physische Gruppenbildung von Angebot und Nachfrage auf euregionalen, themenorientierten (branchenbezogenen) Gewerbegebieten.

### Etat 0.1 Commerce eurégional : l'exportation face à l'importation

	Exportation	Importtion
Parts des entreprises	38%	36%
Parts du commerce étranger dans le commerce total	27%	42%
Parts du commerce eurégional dans le commerce étranger	22%	28%
Parts du commerce eurégional dans le commerce total	6%	12%

## 0 RESUME, CONCLUSIONS ET CONSEILS

### 0.1 Résumé

#### *Généralités*

Environ 40% des entreprises de l'Eurégio exporte vers et plus d'un tiers importe des marchés étrangers dans le monde entier.

Pratiquement toutes les entreprises exportatrices exportent aussi vers l'Eurégio; environ 6% de leur chiffre d'affaires total est réalisé via l'exportation vers l'Eurégio. Toutes les entreprises importatrices n'importent pas de l'Eurégio; 12% du total des achats des entreprises qui importent de l'Eurégio, sont réalisés via l'importation de l'Eurégio.

Les entreprises du Limbourg belge exportent le plus vers et importent le plus de l'Eurégio. Il n'est pas étonnant qu'il y aie un commerce eurégional relativement important de la part des entreprises du Limbourg belge, puisque la plupart des entreprises considèrent la Flandre comme leur marché intérieur. Ce qui a deux conséquences. Premièrement, ce marché intérieur est si petit que les entreprises sont rapidement contraintes de passer à l'exportation et/ou l'importation. Deuxièmement les activités commerciales non seulement avec le Limbourg du Sud néerlandais et la Région Aachen (Aix-la-Chapelle), mais aussi avec la Wallonie, sont souvent considérées comme du commerce eurégional.

Ce qui précède s'applique également aux entreprises de la Province de Liège. Celles-ci considèrent la Wallonie et non toute la Belgique comme leur marché intérieur. Que cependant ces entreprises fassent moins de commerce eurégional que les entreprises du Limbourg belge, provient principalement du fait que les relations commerciales dans la Province de Liège sont orientées davantage vers la France que la partie néerlandaise et allemande de l'Eurégio. En ce qui concerne le pourcentage d'entreprises qui font du commerce international, le pourcentage le plus faible est dans le Limbourg du Sud et dans la Région Aachen. Peut-être que concernant la Région Aachen, le grand marché intérieur allemand y joue aussi un rôle.

Deux entreprises exportatrices sur trois le font par la vente directe (direct sales) et une sur cinq utilise des intermédiaires. Neuf entreprises eurégionales importatrices sur dix le font par la vente directe.

#### *L'Eurégio en tant que région d'exportation*

Les *côtés attrayants et moins attrayants* de l'Eurégio en tant que région d'exportation ont été mis en lumière à l'appui de 17 sujets. Les entreprises jugent principalement positivement la distance géographique faible qui doit être franchie; ce qui rend les délais de livraisons court. On juge l'Eurégio comme étant moins attrayante en raison de la petite région de marché dans laquelle se trouvent de nombreux concurrents et où il y a une forte pression sur les prix de vente. Les différences de cultures et linguistiques ne sont pas ressenties comme un problème; puisque les entreprises sont connues dans les régions frontalières et on sait s'y accommoder, certainement lorsque l'on fait des affaires de l'autre côté de la frontière. Il semble en outre que la plupart des relations commerciales se trouvent (pourtant) entre les régions où la langue est pratiquement la même; l'allemand n'est pas un problème pour des entreprises dans le Limbourg belge et néerlandais. Faire des affaires dans la partie francophone de l'Eurégio est plus difficile, mais il semble que c'est moins difficile une fois que l'on fait des affaires. Concernant les différences dans la législation, la réglementation et le régime fiscal, les entreprises jugent l'Eurégio tout comme d'autres marchés étrangers (il est compréhensible que ce sujet ne joue pas dans le commerce entre la Wallonie et la Flandre).

Sur base d'une liste de onze *barrières* possibles pour exporter dans l'Eurégio, il apparaît en fin de compte qu'il n'y a pratiquement pas de barrières. Trouver les bons partenaires commerciaux est ce qui représente le plus de problèmes. Finalement les différences de langues, de cultures, de loi, de réglementation et du régime fiscal ne sont pas (plus) des barrières une fois que l'on exporte dans l'Eurégio. Il semble que l'information du marché soit suffisante. Dans l'étude 17 *motifs pour ne pas exporter vers l'Eurégio* sont soumis aux entreprises qui n'exportent pas vers l'Eurégio.

## Etat 0.2 L'attractivité de l'Eurégio en tant que région d'exportation et d'importation

	Exportation (figure 3.4)*	Importation (figure 4.4)**
Aspects les plus attrayants (top 3)	<ul style="list-style-type: none"> <li>Délais de livraisons (+)</li> <li>Gestion des relations (+)</li> <li>Prestations de services (+)</li> </ul>	<ul style="list-style-type: none"> <li>Type de fournisseurs (+)</li> <li>Meilleure qualité (+)</li> <li>Délais de livraisons (+)</li> </ul>
Aspects les moins attrayants (top 3)	<ul style="list-style-type: none"> <li>Concurrence (-)</li> <li>Prix de vente (-)</li> <li>Différences fiscales (o)</li> </ul>	<ul style="list-style-type: none"> <li>Différences fiscales (-)</li> <li>Législation et réglementation (-)</li> <li>Prix d'achat (+)</li> </ul>

NB. Concerne exclusivement le jugement d'entreprises qui exportent(\*) et/ou importent(\*\*) au niveau eurégional

*La notion "moins attrayants" n'est pas la même que "inintéressant". En illustration : dans les aspects les moins attrayants de l'Eurégio en tant que région d'importation, figure aussi l'aspect "prix d'achat". Ceci ne signifie pas que les entrepreneurs trouvent que l'Eurégio est une région d'importation inintéressante en raison du niveau des prix d'achat. Lorsque les prix d'achat dans l'Eurégio sont comparés aux prix d'achat ailleurs, l'Eurégio enregistre même un résultat encore bon. Pour la plupart des autres aspects l'Eurégio enregistre cependant des résultats (encore) meilleurs.*

*Les aspects imprimés en vert et auxquels un signe plus (+) est ajouté, sont des aspects où l'Eurégio se distingue positivement des autres régions de commerce. Les aspects imprimés en orange et auxquels un signe zéro (0) est ajouté, sont des aspects où l'Eurégio ne se distingue pas des autres régions de commerce. Seulement lorsqu'un aspect est imprimé en rouge et qu'un signe (-) figure derrière, l'Eurégio est inintéressante en comparaison à d'autres régions de commerce.*

Un des motifs pour ne pas exporter réside dans l'impossibilité de trouver l'information du marché exacte et un autre motif est la langue. Des arguments tels que ne pas pouvoir garantir des livraisons fiables, ne pas pouvoir livrer rapidement, ne pas pouvoir fournir un niveau de services adéquat, des frais de transport trop élevés ou la nécessité de devoir utiliser des intermédiaires, ne sont finalement pas mentionnés comme barrières. Ces aspects qui sont liés typiquement aux longues distances, ne s'appliquent donc pas aux entreprises qui n'exportent pas (encore) sur le plan eurégional.

### ***L'Eurégio comme région d'importation***

*Les côtés attrayants et moins attrayants* de l'Eurégio comme région d'importation ont été mis en lumière à l'appui d'une liste de 16 sujets. On trouve en général l'Eurégio comme région d'importation plus attrayante que d'autres marchés d'importation internationaux. On est positif quant à la présence des bons fournisseurs qui livrent la qualité exacte de manière fiable. On est négatif sur les différences de la législation, de la réglementation et des affaires fiscales.

Il est fait mention de onze *barrières* qui pourraient se présenter à l'importation de l'Eurégio. Finalement de telles barrières n'existent pas. On nomme dans ce cadre les différences de cultures, de langues, du régime fiscal et de l'information du marché qui est éventuellement absente. Ces sujets ne sont pas (plus) ressentis comme une barrière lors de la réalisation des affaires. Des barrières éventuelles pourraient se présenter en cas d'imprécisions des critères de qualité; celles-ci sont perçues parfois comme trop élevées et parfois trop faibles.

Il a été demandé aux entreprises qui n'importent pas de l'Eurégio quels *motifs pour ne pas importer de l'Eurégio* s'appliquent à elles. Peut-être que finalement les motifs pour ne pas importer résident dans la difficulté de trouver l'information du marché et dans le fait que les fournisseurs adéquats ne sont pas toujours présents. Les motifs suivants ne s'appliquent pas comme motif pour ne pas importer de l'Eurégio : impossibilité de livrer rapidement, impossibilité de fournir un bon niveau de services, trop de différences de cultures, nécessité de trop d'investissements (par exemples dans des intermédiaires).

## **0.2 Conclusions**

L'Eurégio est un marché international ordinaire comme toute autre région de commerce international. Il y a par exemple encore des grandes différences fiscales et des différences dans la législation et la réglementation au sein de l'Eurégio. L'Eurégio est à considérer cependant simultanément aussi comme un marché intérieur à côté d'un marché international ordinaire. C'est d'ailleurs sur le plan géographique un marché relativement petit. De nombreux avantages de ce marché se rapportent aussi au critère distances.

L'Eurégio est un marché avec des aspects attrayants et moins attrayants. Aussi bien les exportateurs que les importateurs soulignent le côté attrayant des livraisons fiables, les délais de livraisons courts et les qualités adéquates.

L'aspect peu intéressant pour les entreprises exportatrices est formé par les concurrents nombreux et la pression sur les prix de vente; pour les entreprises importatrices, c'est un marché de l'Importation attrayant en raison des prix d'achat relativement faibles et de la bonne qualité.

L'Eurégio est aussi un marché particulier (international) pour un certain nombre d'aspects, à côté d'un marché ordinaire. En ce qui concerne la zone géographique et le nombre d'entreprises, c'est un marché relativement petit comparé aux marchés mondiaux. Les clients et les fournisseurs sont proches, demandent ou livrent les qualités adéquates. Les délais de livraisons ainsi que la fiabilité des livraisons sont mentionnés comme points très positifs.

Les différences linguistiques et de cultures semblent ne plus jouer de rôle une fois que les entreprises font des affaires hors des frontières nationales; les différences dans la législation, la réglementation et les régimes fiscaux subsistent effectivement. On ne peut rien y faire dans la région, malgré toutes les tentatives d'harmonisation de la législation au niveau européen, attendu qu'ils sont basés sur des décisions prises au niveau national.

La plupart des entreprises effectuent les activités d'exportation et d'importation dans l'Eurégio même. Les entreprises eurégionales utilisent en outre davantage d'intermédiaires pour l'exportation que pour l'importation., Trouver le marché d'exportation ou les clients adéquats semble être plus difficile pour l'exportation que pour l'importation. Il semble plus facile de trouver des fournisseurs dans l'Eurégio que des clients étrangers dans l'Eurégio.

### Etat 0.3 Barrières commerciales au sein de l'Eurégio

	Exportation (figure 3.5)*	Importation (figure 4.5)**
Entrave relativement faible (top 3)	Partenaire de coopération (+) Différences de cultures (+) Différences linguistiques (+)	Délais de livraisons (+) Prestations de services (+) Différences de cultures (+)
Entrave relativement importante (top 3)	Prix de vente (-) Concurrence (+) Conditions de qualité trop élevées (+)	Qualité trop élevée (+) Qualité trop faible (+) Prix d'achat (+)

NB. Concerne exclusivement le jugement d'entreprises qui exportent (\*) et/ou importent (\*\*) au niveau eurégional

*La notion "entrave relativement importante" n'est pas la même "qu'une barrière insurmontable". En illustration : les prix de vente dans l'Eurégio sont finalement considérés par les entrepreneurs exportateurs comme (en outre) une barrière à l'exportation. Ce qui signifie qu'il y a (un peu) plus d'entrepreneurs exportateurs qui estiment que les prix de vente forment une barrière à l'exportation, qu'il n'y a d'exportateurs qui estiment que les prix de vente ne forment pas de barrière à l'exportation. En outre, une partie relativement importante des entrepreneurs exportateurs estiment que la concurrence dans l'Eurégio forme une barrière à l'exportation. Une (petite) majorité des entrepreneurs exportateurs estime cependant que la concurrence ne forme pas une barrière à l'exportation.*

*Les aspects qui sont imprimés en vert et auxquels est ajouté un signe plus (+), ne forment aucune barrière commerciale pour une majorité des entrepreneurs. Seulement lorsqu'un aspect est imprimé en rouge et qu'un signe moins (-) se trouve derrière, une majorité d'entrepreneurs estime que l'aspect concerné forme une barrière commerciale.*

Trouver le niveau de qualité exact est parfois un problème particulier pour les entreprises qui importent effectivement de l'Eurégio, à savoir un problème où la qualité est parfois trop élevée ou trop faible pour ce que l'on recherche.

Trouver l'information sur le marché adéquate semble être une barrière plus importante pour les entreprises qui n'exportent pas encore vers l'Eurégio que pour les entreprises qui n'importent pas encore de l'Eurégio. Les entreprises qui font des affaires au niveau eurégional, indiquent qu'il est moins difficile dans la pratique d'obtenir l'information du marché.

### 0.3 Conseils

''L'Eurégio Meuse-Rhin : votre marché intérieur international !'' selon Etil doit former le thème central de la politique commerciale eurégionale des Chambres de Commerce eurégionales.

Grâce au réseau routier performant, les bonnes relations (inter)nationales (E25, E40, E313 et E314), les entreprises de l'Eurégio Meuse-Rhin peuvent profiter pleinement des faibles distances au sein de l'Eurégio; bien que la liaison nord-sud pourrait encore être améliorée. La proximité physique offre de nombreux avantages (potentiel), tels que les délais de livraisons courts, une fiabilité de livraison élevée, des frais de transport faibles et de bonnes prestations de services. A côté de cela les faibles distances ont pour avantage que les différences de cultures, dans la pratique, au niveau eurégional, sont souvent plus faibles qu'au niveau national. Ceci a pour avantage complémentaire que les entrepreneurs peuvent faire du commerce dans l'Eurégio directement et/ou sans investissements importants. Du moins, si on parle la langue des voisins ou si on la comprend raisonnablement. Obtenir l'information du marché est facilité. Par les caractéristiques de l'Eurégio ci-dessus, l'Eurégio forme un tremplin idéal pour les entrepreneurs de l'Eurégio qui veulent étendre l'exportation internationale.

Les avantages mentionnés ne sont cependant pas encore totalement reconnus ni utilisés. Ceci provient en partie des différences linguistiques,

mais ce qui a principalement un effet entravant, ce sont les grandes différences fiscales et les différences de la législation et de la réglementation. L'Eurégio ne forme absolument pas encore un marché national sur ces points. Le commerce eurégional doit encore être vu comme exportation et importation et le commerce eurégional ne diffère pas ou peu du commerce international en général.

#### ***Communication : positionner l'Eurégio en tant que marché intérieur international***

Les Chambres de Commerce doivent communiquer clairement que faire du commerce dans l'Eurégio est une affaire attrayante. Comme pour tout autre marché international, interviennent il est vrai des différences dans la législation et la réglementation et le régime fiscal, mais les différences linguistiques et culturelles jouent un rôle beaucoup moindre que sur les autres marchés internationaux. De ce fait et en raison des faibles distances, on peut agir aussi plus facilement de la base, sans intermédiaires et/ou investissements supplémentaires. L'étude donne des points de départ pour une action orientée sur le thème ''L'Eurégio Meuse-Rhin : votre marché intérieur !''. Puisque les fournisseurs adéquats et les clients sont présents dans cette zone relativement petite. L'image d'un marché intérieur international doit être créée avec des frais de transport relativement faibles, des clients et des fournisseurs adéquats avec les qualités souhaitées et la fiabilité des livraisons.

#### ***Déplacer (partiellement) l'attention de l'exportation vers l'importation***

L'Eurégio est un marché d'importation attrayant avec des prix faibles, des frais de transport faibles, des fournisseurs adéquats, une bonne qualité et des livraisons rapides et fiables. Il est compréhensible en conséquence que ce marché soit moins attrayant en tant que marché d'exportation : de nombreux concurrents et une pression sur les prix pour les entreprises exportatrices vers l'Eurégio. Cette image de l'Eurégio doit être esquissée avec plus de précision pour bien faire apparaître la caractérisation exacte du marché (intérieur). L'accent peut être mis ici en premier lieu sur le marché d'importation attrayant.

#### Etat 0.4 Motifs pour ne pas faire du commerce eurégional

	Exportation (figure 3.6)*	Importation (figure 4.6)**
Motif relativement peu important (top 3)	Fiabilité des livraisons (+) Délais de livraisons (+) Prestations de services (+)	Délais de livraisons (+) Prestations de services (+) Différences de cultures (+)
Motif relativement important (top 3)	Information du marché (-) Différences linguistiques (+) Type de clients (+)	Information du marché (+) Type de clients (+) Différences linguistiques (+)

NB. Concerne exclusivement le jugement d'entreprises qui n'exportent (\*) et/ou n'importent (\*\*) pas au niveau eurégional

*La notion "motif relativement important" n'est pas explicitement comme "un motif déterminant". En illustration : il y a relativement beaucoup d'entrepreneurs qui renoncent au commerce eurégional en raison des différences linguistiques, mais pour une majorité des entrepreneurs les différences linguistiques ne forment pas un motif pour renoncer au commerce eurégional.*

*Les aspects imprimés en vert et auxquels est ajouté un signe plus (+), ne forment pas de motif pour renoncer au commerce eurégional pour une majorité des entrepreneurs. Seulement lorsqu'un aspect est imprimé en rouge et qu'un signe moins (-) se trouve derrière, cet aspect forme un motif pour renoncer au commerce eurégional pour une majorité des entrepreneurs.*

### ***Approche des mauvaises perceptions : 'telling the success stories'***

Les entreprises qui ne font pas de commerce eurégional pensent qu'il y a de nombreuses différences pour eux qui ne peuvent pas être influencées (langue, culture, fisc, législation et réglementation) et que de ce fait il est difficile de trouver et d'obtenir une bonne information du marché. Dans la pratique, il apparaît, selon les entreprises qui font effectivement des affaires dans l'Eurégio, qu'il n'y a pas trop de peine. Les Chambres doivent dissiper ces préjugés et ces mauvaises perceptions. Ce qui est possible par des campagnes de communication ciblées, par des entreprises qui demandent l'information du marché, en fournissant du travail sur mesure et par le récit d'entreprises témoins qui racontent leur "success story".

### ***Attention pour la perception de la qualité***

Des entreprises de la Région Aachen (Aix-la-Chapelle) et de la partie germanophone de la Province de Liège estiment que leurs qualités ne sont pas bien jugées (ce qui signifie trop faibles ou trop élevées) par les entreprises des autres parties de l'Eurégio. Des actions ciblées doivent être entreprises pour créer la perception de qualité adéquate. Il ne s'agit pas simplement d'esquisser l'image exacte de la qualité (technique) objective, mais aussi de la qualité subjective (perçue par le client) (approche "quality in use").

### ***Attention pour le multilinguisme***

La langue n'est apparemment qu'une petite barrière pour les entrepreneurs qui commercent au niveau eurégional et pour les entrepreneurs qui ne commercent pas au niveau eurégional c'est. Il faut indiquer cependant directement que dans la pratique le commerce eurégional au sein des régions linguistiques est plus important qu'entre les différentes régions linguistiques. La langue néerlandaise et allemande ne semblent pas procurer de problèmes pour les entreprises actives au niveau eurégional. Le français par contre bien. Les trois langues (et notamment le français) devront avoir davantage d'attention dans l'enseignement dans l'Eurégio. Les Chambres de Commerce peuvent souligner à côté de cela l'importance d'une offre de cours de langues. Il est important en outre que les consultants en commerce international des Chambres de Commerce maîtrisent les trois langues. Les cinq

Chambres devront devenir trilingues et l'information du marché doit être disponible dans les trois langues.

### ***Lobby eurégional***

Bien que l'Eurégio peut former le marché intérieur pour les entreprises dans l'Eurégio Meuse-Rhin, ceci n'est pas encore le cas dans la pratique. Ce qui est caractéristique pour un marché intérieur, c'est qu'il n'existe pas de (grandes) différences fiscales et de différences dans la législation et dans la réglementation. Les cinq Chambres doivent donc poursuivre activement leur lobby commun pour l'harmonisation entre les trois pays concernés et un "statut séparé/status aparte" pour l'Eurégio Meuse-Rhin en direction des gouvernements nationaux et de l'UE. L'introduction de l'euro a facilité le commerce international. Les facteurs traditionnels tels que les différences de langues et de cultures qui entravent le commerce international, semblent jouer un rôle moindre. Il est important maintenant de supprimer les différences qui subsistent encore dans la législation, la réglementation et le régime fiscal, ou bien de les réduire.

### ***Formation de chaînes et de clusters eurégionaux***

Ce qui précède n'apporte naturellement pas de solution au fait que l'Eurégio forme un marché relativement petit. Les Chambres de Commerce ne peuvent pas non plus changer cette situation de marché. Les Chambres de Commerce peuvent apporter une contribution à la formation plus ample de chaînes et de clusters. Il s'agit aussi bien de la constitution et de la maintenance de réseaux d'entreprises qui ne sont pas établis sur un seul site que la réunion physique de l'offre et de la demande sur des terrains d'entreprises thématiques eurégionaux.



## 1 INTRODUCTION

### 1.1 Background

As part of the ongoing operational harmonisation of future activities between the various chambers of commerce in the Euregio Meuse-Rhine<sup>1</sup>, it is the wish of the partners to gain a better insight into the trade flows (export and import) between businesses in the Euregio Meuse-Rhine (the Euregio). Expanding knowledge about current and potential trade flows and any ensuing activities that help break down barriers and bring about opportunities will be instrumental in bringing about more cross-frontier activities amongst the business community in the Euregio.

Existing data sources and references provide little in the way of information about import and export patterns within the Euregio. There is a marked lack of information on cross-frontier trade flows between individual businesses in the Euregio. If there are figures available, these relate to trade flows between countries and not flows between regions. Neither is there any data available at a group level amongst businesses in each of the regions of the Euregio. Furthermore, it is not possible to identify from the statistics what opportunities and challenges exist for intensifying these trade flows.

As part of the Interreg III Euregional Businesses Platform project, a request was made to Etil by the 'Trade Promotion' working group of the Chambers of Commerce Euregio Maas-Rhine to co-ordinate a research study which would generate the information necessary to identify existing trade flows, obstacles to trade and potential opportunities in the Euregio.

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<sup>1</sup> Combined as the Chambers of Commerce Euregio Meuse-Rhine.

### 1.2 Problem definition

The problem definition for the study can be set out in the following two questions:

- What cross-frontier trade flows exist between businesses in the Euregio and the individual regions within the Euregio?
- What can the Chambers of Commerce Euregio Meuse-Rhine do to stimulate cross-frontier activities amongst businesses in the Euregio?

### 1.3 Plan of action

The study consists of the following stages:

1. Written questionnaire for businesses (quantitative questions)
2. Workshops with businesses (qualitative questions)
3. Digital questionnaire for businesses (qualitative questions)
4. Analyses and report the results:
  - Part 1: Euregio Meuse-Rhine (Main Report)
  - Part 2: Zuid-Limburg (Netherlands)
  - Part 3: Provincie Limburg (Belgium)
  - Part 4: Province de Liège (Belgium)
  - Part 5: Kammerbezirk Aachen (Germany)



## 1.4 How to read this report

This (main) report looks at overall patterns of Euregional trade rather than zooming in on the constituent regions individually. The latter are extensively dealt with in regional reports. Because many assertions made in this report concerning the Euregio are made on the basis of the research results for the constituent regions being combined, the assertions made here must be treated with some degree of caution. For a more refined picture, reference must be made to the regional reports.

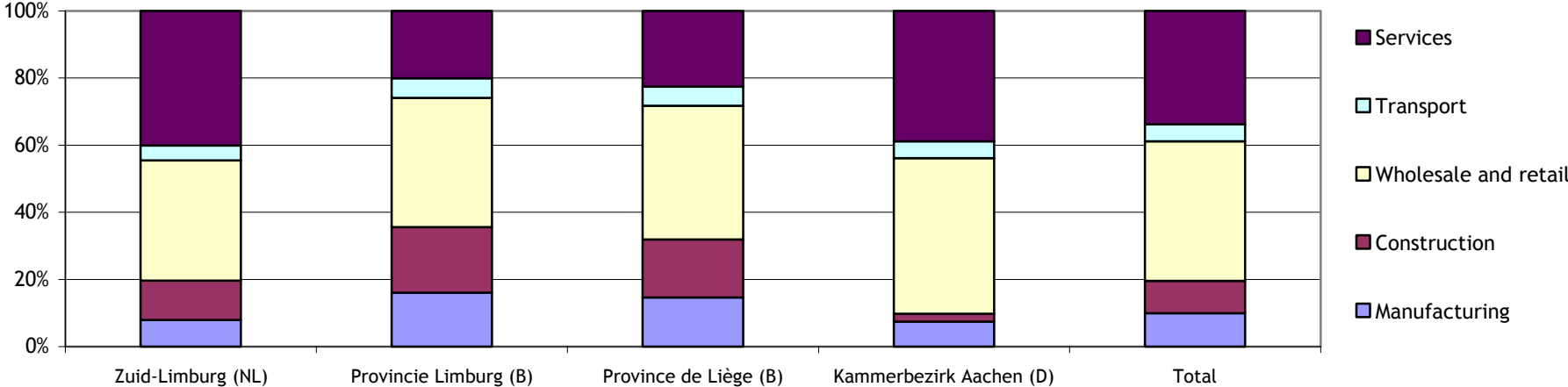
In section 2 an accountability for the study is given. The third section of this report looks at Euregional export, with Euregional import being dealt with in the subsequent section. Both sections have the same structure. The first part of each section looks at the volume and organisation of Euregional trade. The second part focuses on the attractive facets associated with doing business in the Euregio. Trade barriers are examined in the third part and reasons not to engage in Euregional trade dealt with in the fourth. In the final section of this report, a number of conclusions are made about Euregional trade flows. The typewritten and digital questionnaires have been added in the form of appendices.

The figures and tables form an integral part of this report (on the left-hand or even-numbered pages). The text provides a commentary on these (on the right-hand or odd-numbered pages).

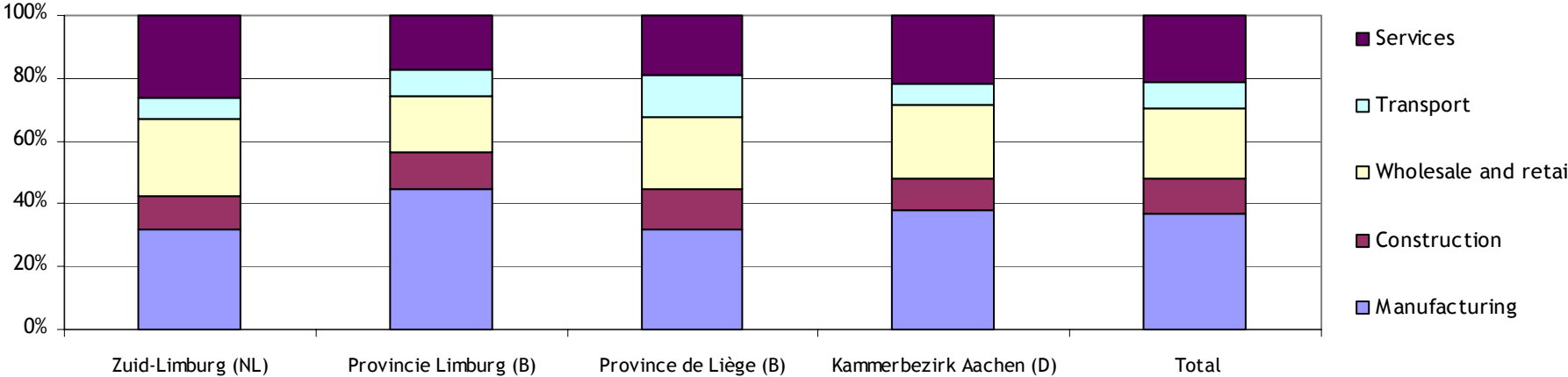
It should be explained that the regional reports do not give an accountability for the study, nor do they contain any appendices (questionnaires). These reports zoom in on the results of the study and the structure and lay out differ in a number of ways from the main report. The regional reports look at the topic from two different angles:

- the Euregio in the eyes of businesses in the constituent region concerned;
- the constituent region as trading region in the eyes of businesses elsewhere in the region.

**Figure 2.1 Population (establishments)**



**Figure 2.2 Population (persons employed)**



## 2 ACCOUNTABILITY

### 2.1 The study population

At first sight, the service sector is strongly represented in Zuid-Limburg and the Aachen Region (figure 2.1). However, this can partly be accounted for by the fact that there are differences in definition between the three countries concerned.

If we look at the number of persons employed in the different sectors in the various regions, the importance of manufacturing for the Euregio is underlined.

Not all economic sectors and activities have been included in this study. We have concentrated on those commercial sectors and activities which account on a relatively large scale for the import and export of raw materials and goods. This means that agricultural businesses, the retail sector, hotel & catering and public sector organisations have not been included.

A. Agriculture, hunting and forestry	No
B. Fishing	No
C. Mining and quarrying	Partial
D. Manufacturing	Yes
E. Electricity, gas and water supply	No
F. Construction	Yes
G. Wholesale and retail trade	Partial (Wholesale trade)
H. Hotels and restaurants	No
I. Transport, storage and communication	Partial
J. Financial services	Partial
K. Real estate, renting and business	Partial
L. Public administration	No
M. Education	No
O. Other public services	No

### 2.2 Structure and methodology

#### *Written questionnaires*

The data required for the study were obtained by means of a written questionnaire (appendix 1). The individual chambers of commerce were responsible for defining the sample population in their own region and distributing the questionnaires (early 2003). Once they had received completed questionnaires from respondents, these were then passed on to Etil. R&M Matrix was responsible for data-processing, which involved checking the questionnaires and entering data in a database via a Bellview data entry programme.

#### *Workshops*

Etil organised two workshops with business people from the different regions relating to export and import respectively in the Euregio Meuse-Rhine. Participants were selected by the chambers of commerce on the basis of a list of companies, who after completing the questionnaire, had expressed an interest in participating in a follow-up study. The chambers of commerce were also responsible for sending out the invitations. The workshops were held at the Kamer van Koophandel voor Zuid-Limburg in Maastricht (in early 2004)<sup>2</sup>. The workshop, led by Professor Kasper, managing director of Etil, looked at the qualitative aspects of Euregional trade. The results of these workshops formed the basis for a second (digital) questionnaire and were used in analysing the results of this questionnaire.

#### *Digital questionnaire*

The data required for the study were obtained on the basis of a digital questionnaire (appendix 2).

<sup>2</sup> There were no businesses from the French-speaking part of the Province de Liège.

**Table 2.1. Sample size (gross) and usable response (net) of written and digital questionnaires**

	Zuid-Limburg		Provincie Limburg		Province de Liège						Aachen Region		Total	
	Maastricht (NL)		Hasselt (B)		Liège (B)*		Verviers (B)*		Eupen (B)*		Aachen (D)		gross	net
	gross	net	gross	net	gross	net	Gross	net	gross	net	gross	net	gross	net
<b>Written questionnaire</b>														
1. Manufacturing (including mining)	1,781	238	1,041	147	965	56	429	62	241	66		251		
2. Construction		39	164	31	345	16	202	24	127	20		47		
3. Wholesale		30	223	14	404	8	202	23	225	8		45		
4. Transport, storage and communication	750	11	57	3	259	4	156	9	78	6		43		
5. Financial services		3	-	3		2	8	10	42	-		13		
6. Real estate, IT, other business services		59	99	9	323	19	192	20	17	23		136		
7. Other or not known	-	20	-	11	-	5	-	5	86	13		13		
Total	2,531	400	1,584	218	2,296	110	1,189	153	816	136	5,300	548	13,716	1,565
<b>Response</b>		16%		14%		5%		13%		17%		10%		11%
<b>Digital questionnaire</b>														
Agreed to follow-up study	216		144		47		66		80		374		927	
By e-mail and/or telephone	196		137		46		63		80		333		855	
Of whom were available	126	39	103	34	32	13	45	9	54	14	207	46	567	155
<b>Response</b>		31%		33%		40%		20%		26%		22%		27%

\* Where possible, in then analysis and reporting, a distinction has been made between the (mainly) French-speaking part of the Province of Liège (Liège and Verviers) and the (mainly) German-speaking part of the Province of Liège (Eupen).

The sample population was formed by businesses which had participated in the written questionnaire and indicated a willingness to participate again in the study. Only those companies for which R&M Matrix had email addresses or whose email address could be obtained via a telephone number were approached. Companies whose email address didn't function properly were also called by phone (if their telephone number was known) to verify the email address.

Businesses were sent an email in which they were thanked for their participation in the digital questionnaire. Via a link and a unique password they were able to open and complete the internet-based questionnaire.

All potential respondents received two thank-you plus reminder emails. Because of the disappointing response it was decided to phone all those who had not completed (in full) the questionnaire (if the phone number was available) to encourage them to fill in the questionnaire and to find out their reason for not having responded. Furthermore, respondents were also given an opportunity to fill in the questionnaire in writing.

### 2.3 Sampling procedure and management

A sample population was used for the purposes of the study. This was a proportional sample with a booster for manufacturing. The sample was taken from six regions: Hasselt (B), Liège (B), Verviers (B), Eupen (B), Aachen (D) and Maastricht (NL). Addresses were drawn from each sector per region (table 2.1). These addresses were sampled in relation to the population (i.e. industry sector) except for manufacturing. Manufacturing was deemed to be of such importance that additional addresses per region were drawn for this sector, i.e. a booster sample. All respondents who participated in the written questionnaire and indicated a willingness to partake in the study were approached for the digital questionnaire (table 2.1).

### 2.4 Weighting

According to the basic principles, sample results must be weighted or projected. This study also used a weighting procedure (but no projection). This was done because no representative judgements could otherwise be made with respect to the overall sample, neither according to industry sector nor to region. Two weightings were made: one relating to industry sector, the other relating to size category. Because the manufacturing sector was strongly over-represented in the written questionnaire on account of the booster, the first weighting was extremely heavy. However, in order to achieve a representative sample this heavy weighting was essential. As far as manufacturing industry is concerned - in contrast to other sectors - weighting also took place on the basis of size category.

In the first place, the six regions merged to form 4 regions<sup>3</sup> and the size categories were likewise reduced to 4 categories and the sector variable was combined to categories<sup>4</sup>.

Two control tables were then generated for size category and region (for manufacturing) and for sector and region. When it appeared that these did not correspond to the actual distribution, the results were adjusted at a cell level. First of all, weighting was done for size category and region (for manufacturing) and then for sector and region<sup>5</sup>.

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<sup>3</sup> Provincie Limburg (Hasselt), Province de Liège (Liège, Verviers en Eupen), Aachen Region (Aachen) and Zuid-Limburg (Maastricht).

<sup>4</sup> Financial and business services are combined as services (table 2.1: 5+6)

<sup>5</sup> For a more detailed explanation please refer to the accountability report of R&M Matrix

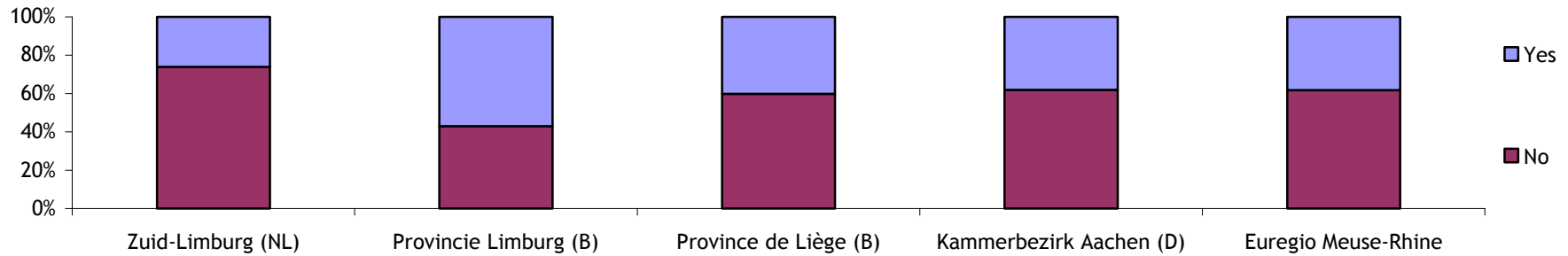


## 2.5 Representativeness

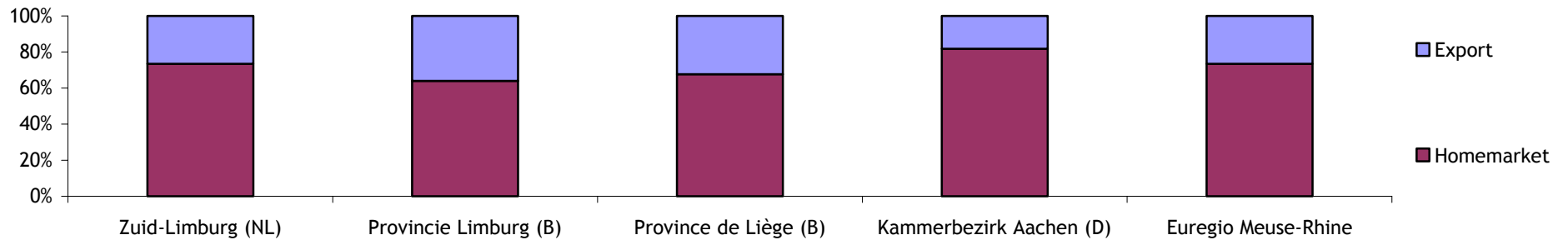
In determining the representativeness of a sample, almost every research study is faced with the difficulty that the criteria and data on which the representativeness is based, are missing. The same problem applies to this study. However, if the procedure described above is examined, according to R&M Matrix, there is no reason to assume that the sample which forms the basis for the study should not be representative for the population described.

On the other hand, the response, in particular for the digital questionnaire, is extremely limited. This not only increases the likelihood of selective drop-out, but also means that statistically meaningful assertions about quantitative aspects should be treated with some caution. According to Etil, cross-checking of the results of the digital questionnaire with the results of the workshops demonstrated that it was possible to make meaningful assertions about qualitative aspects. The results of the digital questionnaire and the results of the workshops run parallel to each other. Etil has therefore also drawn the explanations for the results of the digital questionnaire from the workshops.

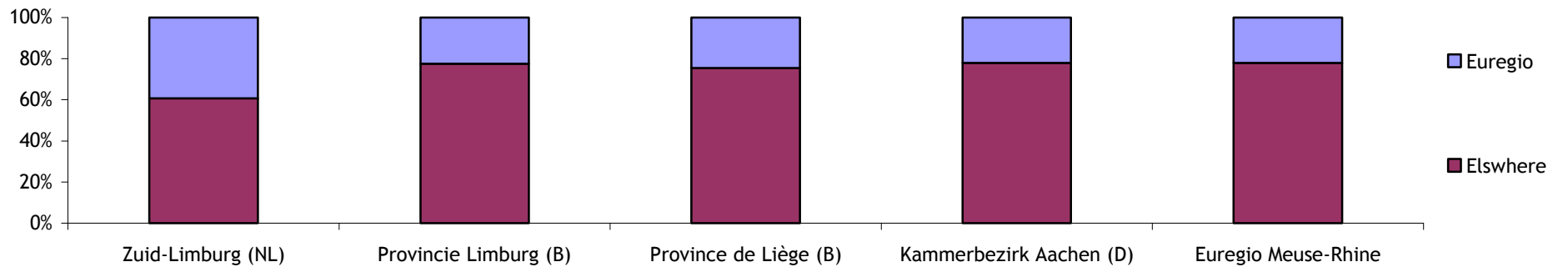
**Figure 3.1 Share of exporting businesses**



**Figure 3.2 Share of export in the total turnover of exporting businesses**



**Figure 3.3 Share of Euregional export (turnover) in the total export (turnover) of exporting companies**



## 3 EUREGIONAL EXPORT

### 3.1 Size and organisation of Euregional export

For the written questionnaire only cross-frontier trade was looked at. Trade flows between the Belgian regions were therefore ignored. This was a conscious choice, since otherwise the written questionnaire would have been too long, which would have had a negative effect on response levels. For the digital questionnaire on the other hand, attention was given to trade flows between the Belgian regions. Although, technically speaking, this does not involve international trade, the sale of goods and services by Belgian companies to another Belgian part of the Euregio, for the purposes of this report constitutes Euregional export.

The written questionnaire revealed that two-fifths of all businesses in the Euregio export (figure 3.1)<sup>6</sup>. Within the Euregio, the highest share is taken up by the Provincie Limburg (B) and the lowest by Zuid-Limburg (NL). Within manufacturing and the wholesale sector the share of exporting companies was significantly above the Euregional average and in other sectors under the Euregional average.

Around a quarter of turnover amongst exporting companies is derived from foreign countries (figure 3.2). Within the Euregio, this share is highest in Provincie Limburg (B) and the lowest in Aachen Region (D). A possible explanation for this is the size of the national domestic market. In the workshops, participants indicated that export was often necessary when the opportunity for domestic expansion declined. It is evident that the German 'domestic market' is considerably larger than the Belgian 'domestic market'.

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<sup>6</sup> It should be stressed here that export and import oriented business sectors were surveyed in particular.

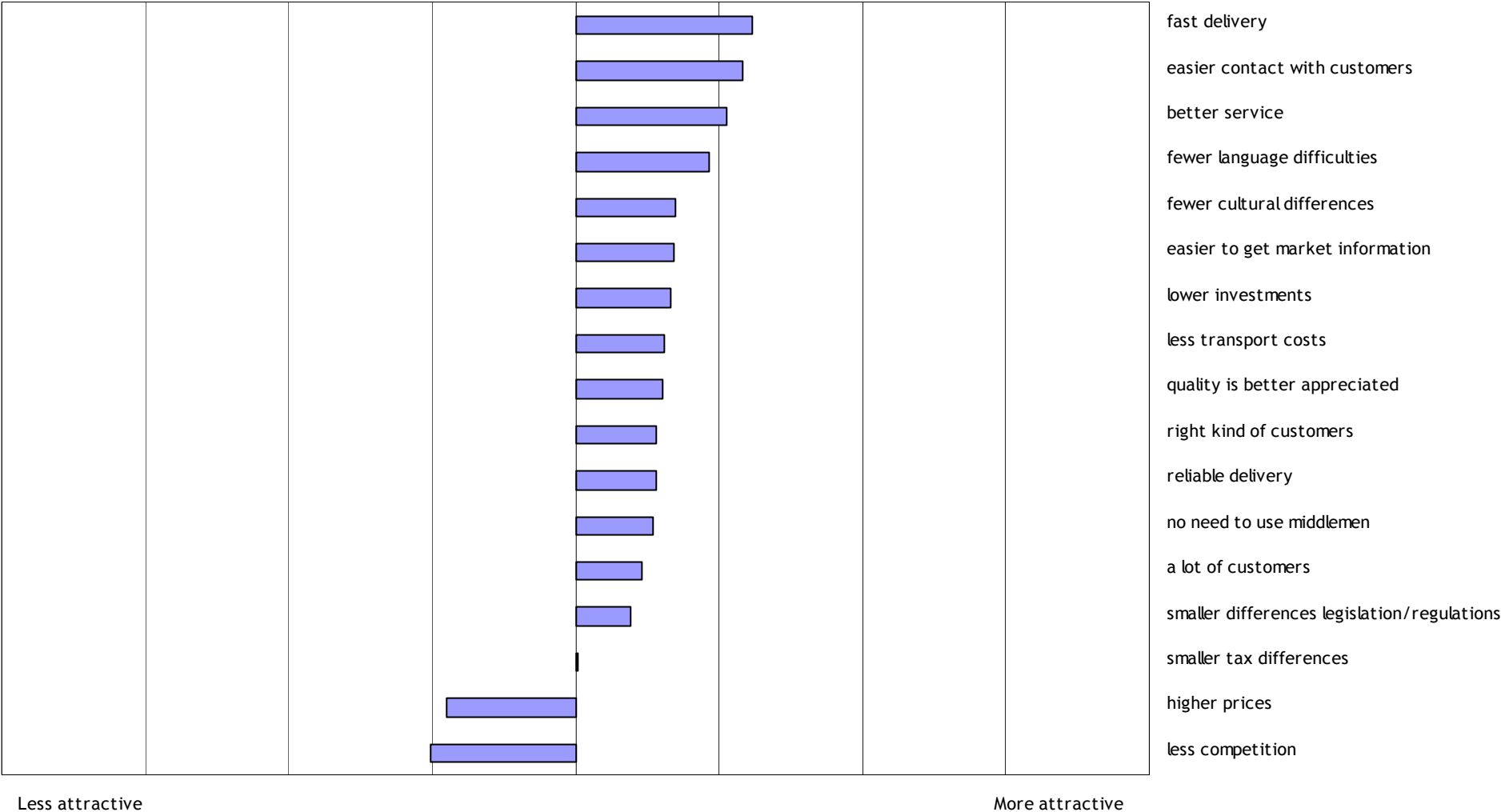
Furthermore, during the workshops it became evident that companies in Provincie Limburg (B) often considered their domestic market to be Flanders, and not Belgium as a whole.

In order to start up business in Wallonia, it is often necessary to first open an outlet there otherwise there is a preference to do business with suppliers in France. To an extent, the reverse is also true.

Almost all companies with export activities, exported goods and services within the Euregio. Around one-fifth of foreign turnover for these companies came from the Euregio (figure 3.3). This means that the Euregio accounts for around 6% of the total turnover of exporting companies that are based in the Euregio. In the concluding section of this report, attention focuses more deeply on the trade flows between the four constituent parts.

During the digital questionnaire, exporting companies in the Euregio were asked how they organised the sale of their goods and services to other parts of the Euregio (appendix 2: question 4). This revealed that two-thirds of exporting companies in the Euregio sell directly from their head office. One-fifth of exporting companies in the Euregio make use of one or more local agents. Franchisers, importers and wholesalers are used to a much lesser extent and joint-ventures are few and far between.

**Figure 3.4 Attractive aspects of the Euregio as an export region**



*Summarised positive and negative views with respect to statements.*

### 3.2 Attractiveness of the Euregio as an export region

As part of the digital questionnaire, companies which sell their products and/or services to one or more constituent regions of the Euregio - in addition to the region in which they are located - were given a number of statements with regard to the attractiveness of the Euregio as an export region in relation to other export regions<sup>7</sup>. In this section of the report, the results per constituent region have been combined to form a composite opinion about the Euregio as an export region. The regional reports contain a more detailed explanation (per region) of these opinions.

For the purposes of this study however, this trade was considered to be Euregional trade (export and import). In this section of the report, the results per constituent region have been combined to form a composite opinion about the Euregio as an export region. The regional reports contain a more detailed explanation (per region) of these opinions.

It would appear that the Euregio - as an export region - is only slightly more attractive than other export regions (figure 3.4). Looking at the results, there are indeed more positive than negative responses to the statements, but these are not overwhelmingly so. A relatively positive verdict was made with respect to distance-related aspects (such as delivery times) and less positive with respect to market-situation related aspects (such as competition). This conclusion corresponds to the findings of the workshops. During these, businesspersons who do business in the Euregio indicated that the short distances within the region are an intrinsic quality of the Euregio for those companies which are based there. More distant export regions cannot compete with the distance-related characteristics which the Euregio possesses. This is not the case however for market situation. Compared to other regions, the Euregio represents a small export region with a great deal of competition which puts a squeeze on prices.

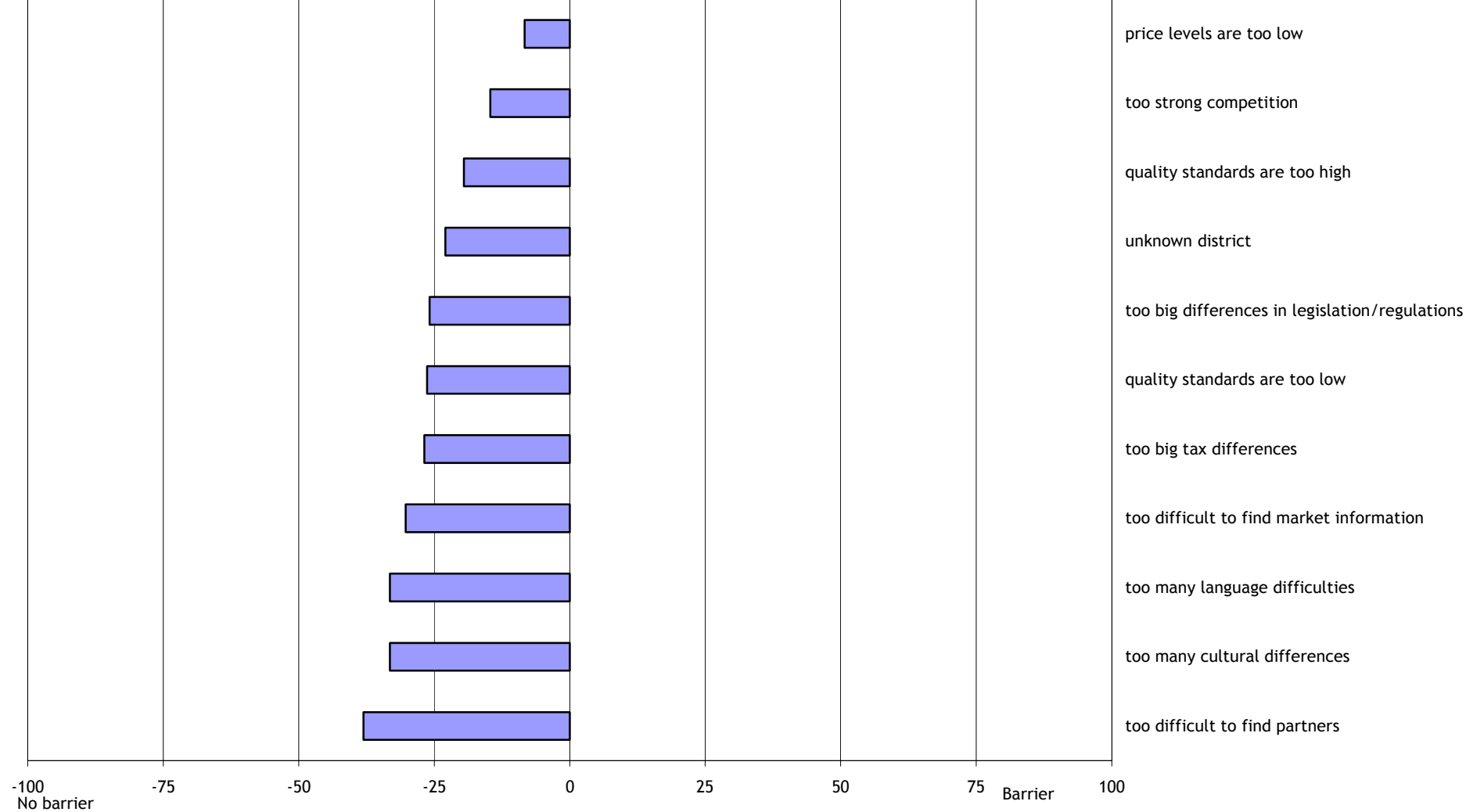
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<sup>7</sup> Appendix 2, question 5.

Despite the fact that the Euregio has three language frontiers and four of five cultural boundaries, businesses do not see linguistic and cultural differences as any great problem. This view corresponded to the findings at the workshops, at which participants expressed an opinion that language difficulties could be overcome relatively easily, because many business people trading internationally are multi-lingual. This is partly due to the proximity of the language boundaries. It should be noted however that differences exist between the constituent regions themselves. This is confirmed in the regional reports. In general, the most intensive trading activities can be found in those parts where there is no language barrier. Additionally, German does not appear to be an big obstacle to businesses in Provincie Limburg (B), and this is no less so in Zuid-Limburg (NL). The only constituent region which is confronted with a not inconsiderable language barrier is the French-speaking part of the Province of Liège. This is perceived as such not only by those in this region themselves, but by businesses in the rest of the Euregio. In addition, during the workshops, participants pointed out the fact that whilst there may be cultural differences within the Euregio, these were in most cases considerably smaller than those in the three countries to which the constituent regions form part. This is partly due to the relatively peripheral position of the constituent regions within their own countries. What's more, many businesses are familiar with these cultural differences and as such, fewer mistakes or misunderstandings take place. Finally, it was suggested during the workshops that these cultural differences are being smoothed out anyway, as a result of globalisation.

The fact that the Euregio does not differentiate itself positively from other export regions with respect to aspects of tax and regulations is not surprising. These are primarily national aspects and not regional. Furthermore, the differences between the three different countries are more or less the same as those that exist between other countries in the European and there are few differences between the constituent Belgian parts of the Euregio.

Figure 3.5 Export barriers within the Euregio



Summarised positive and negative views with respect to statements.

### 3.3 Export barriers within the Euregio

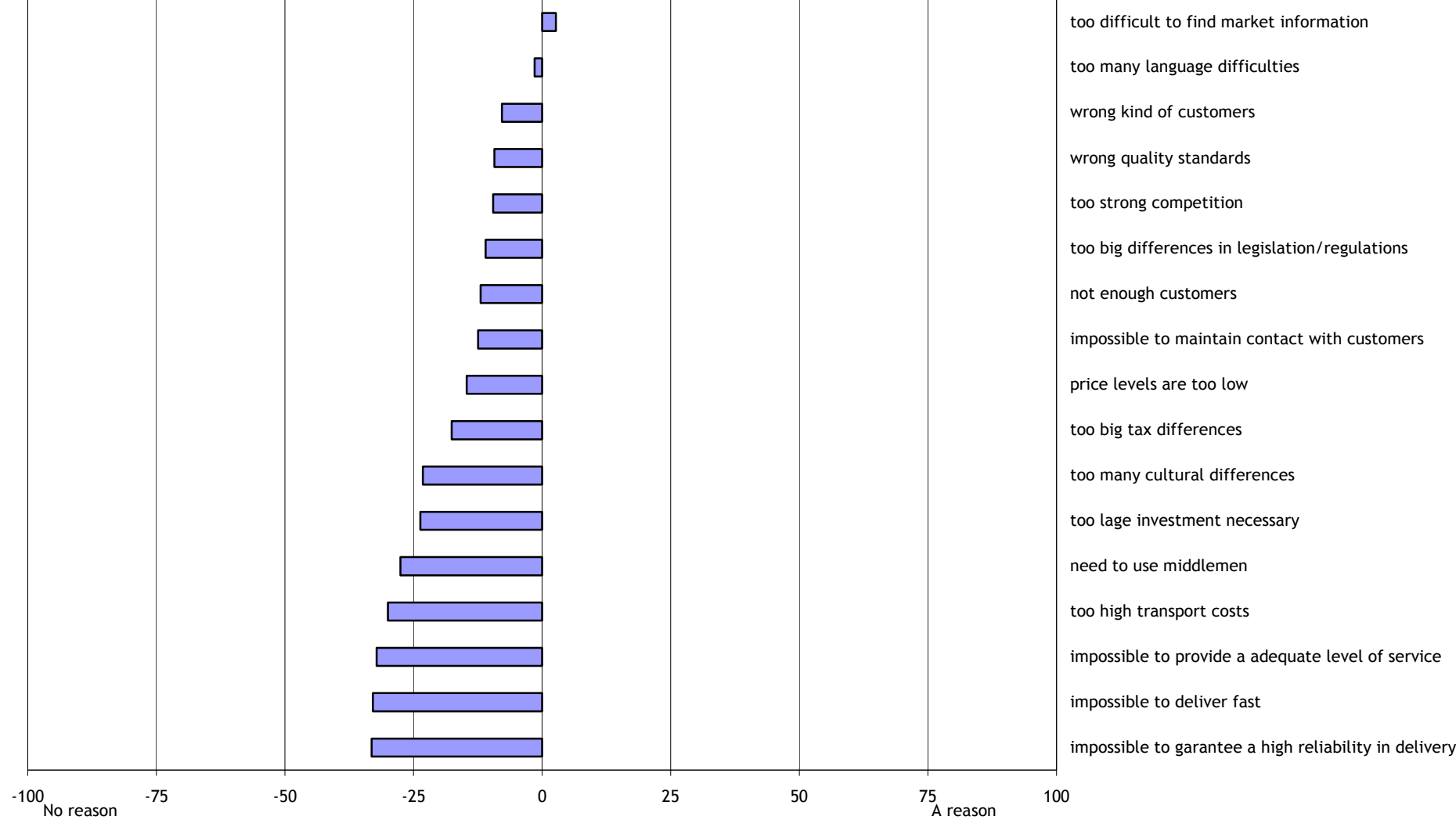
Whilst the attractiveness of the Euregio as an export region might say a great deal, it does not say everything about the export opportunities it affords to businesses. Companies which do business in the Euregio were therefore given a number of statements with respect to export barriers within the Euregio<sup>8</sup>. This section of the report likewise combines the results per constituent part to form a composite opinion about the Euregio.

At first sight, there do not appear to be any export barriers within the Euregio for companies doing business there (figure 3.5). The picture that businesses trading in the Euregio have about its attractiveness and its barriers to export appears to show a great deal of similarity. The picture with respect to barriers is slightly more positive than that for attractiveness. Anything that might otherwise be seen as an export barrier, such as differences in language, culture tax and regulations, no longer apply for those companies once they have started with Euregional export. Seemingly, these barriers 'disappear' once businesses have sufficient market information.

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<sup>8</sup> Appendix 2, question 6.

**Figure 3.6 Reasons not to export to the Euregio**



*Summarised positive and negative views with respect to statements.*

### 3.4 Reasons not to export to the Euregio

Companies which do not export to any of the other constituent parts of the Euregio (where they are not located) were given a number of statements with regard to the reasons they do not export to the other constituent regions<sup>9</sup>. This section of the report likewise combines the results per constituent part to form a composite opinion about the Euregio.

It is striking that there is no one general decisive reason for not selling products or services to other parts of the Euregio (figure 3.6)<sup>10</sup>. If this picture is compared to that with respect to views of exporting companies about the attractiveness of the Euregio, there appear to be large similarities. Distance-related aspects (such as delivery times) hardly seem to provide a reason not to sell products or services to the Euregio. Relatively important reasons not to do business are market-situation related aspects (such as the number and type of customers). However, language differences and difficulty in obtaining market information would seem to be the most important reasons for not doing business with other parts of the Euregio. There would appear to be a discrepancy between the reality - as experienced by exporting companies - and the perception of non-exporting companies with respect to language differences.

As far as the aforementioned is concerned, it should be noted that this is a composite opinion which does not do justice to the differences between the constituent regions (see inset). The regional reports contain more detailed explanations.

*Business A in Zuid-Limburg (NL) exports to Provincie Limburg (B), but not to the Province of Liège (B). In the overall opinions with respect to the attractiveness of the Euregio, the company's views about Provincie Limburg (B) have been included and in the opinion about reasons not to sell to the Euregio the views of that same company have been taken into account with respect to the Province of Liège (B). The possibility should not be excluded that the company in question has different views about the problems of language differences in both situations.*

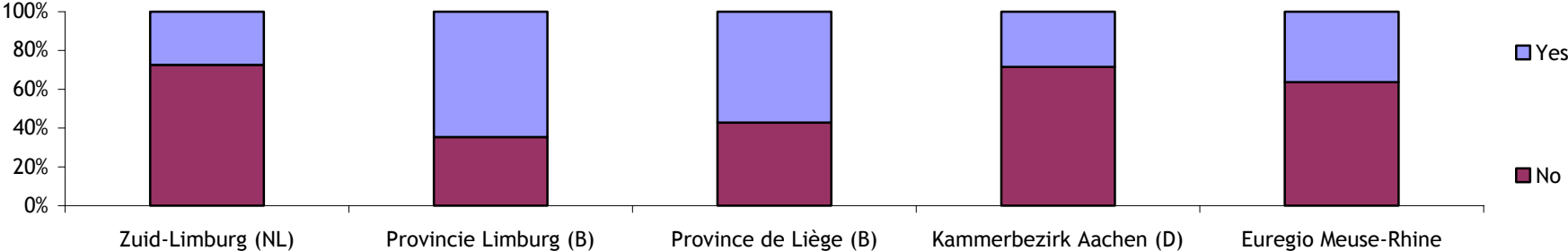
*Unfortunately, the response to the digital questionnaire was not large enough to filter out this distortion with respect to opinions towards the Euregio as a whole. In the regional reports, this distortion is considerably smaller.*

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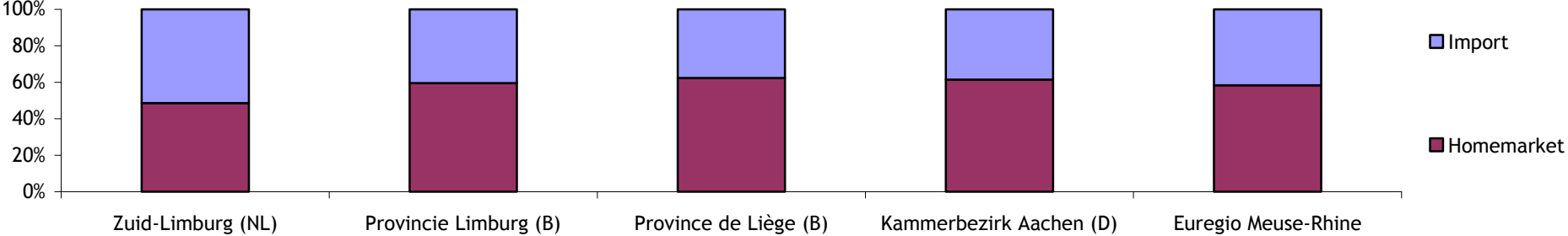
<sup>9</sup> Appendix 2, question 8.

<sup>10</sup> It should be stressed here that - depending on the constituent region - 30 to 45% of companies not exporting van de to the Euregio, said that didn't export at all.

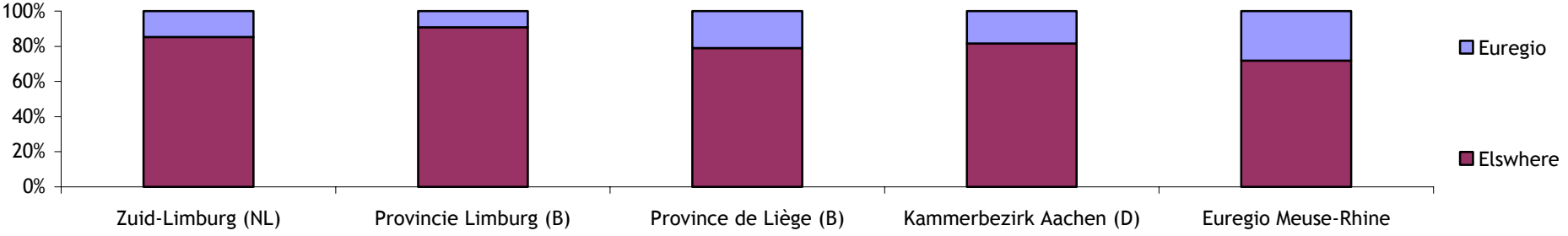
**Figure 4.1 Share of importing businesses**



**Figure 4.2 Share of import in total purchases of the importing businesses**



**Figure 4.3 Share of Euregional import (purchase) in the total import (purchase) of importing businesses**



## 4 EUREGIONAL IMPORT

### 4.1 Size and organisation of Euregional import

During the written questionnaire only cross-frontier trade was looked at. Trade flows between the Belgian regions were therefore ignored. This was a conscious choice, since otherwise the written questionnaire would have been too long, which would have had a negative effect on response levels. For the digital questionnaire on the other hand, attention was given to trade flows between the Belgian regions. Although, technically speaking, this does not involve international trade, the import of goods and services by Belgian companies from another Belgian part of the Euregio, for the purposes of this report constitutes Euregional import.

The written questionnaire revealed that over one-third of all businesses in the Euregio imports (figure 4.1)<sup>11</sup>. Within the Euregio, this share is highest in Provincie Limburg (B) and the lowest in Zuid-Limburg (NL) and the Aachen Region (D). The regional differences disappear almost completely if the share of import in total purchases of importing businesses is examined. Around two-fifths of purchases made by importing companies is derived from foreign countries (figure 4.2). Only in Zuid-Limburg (NL) is this share higher. Within the manufacturing and wholesale sectors the number of importing businesses is considerably above the Euroregional average and in the other sectors under the Euregional average.

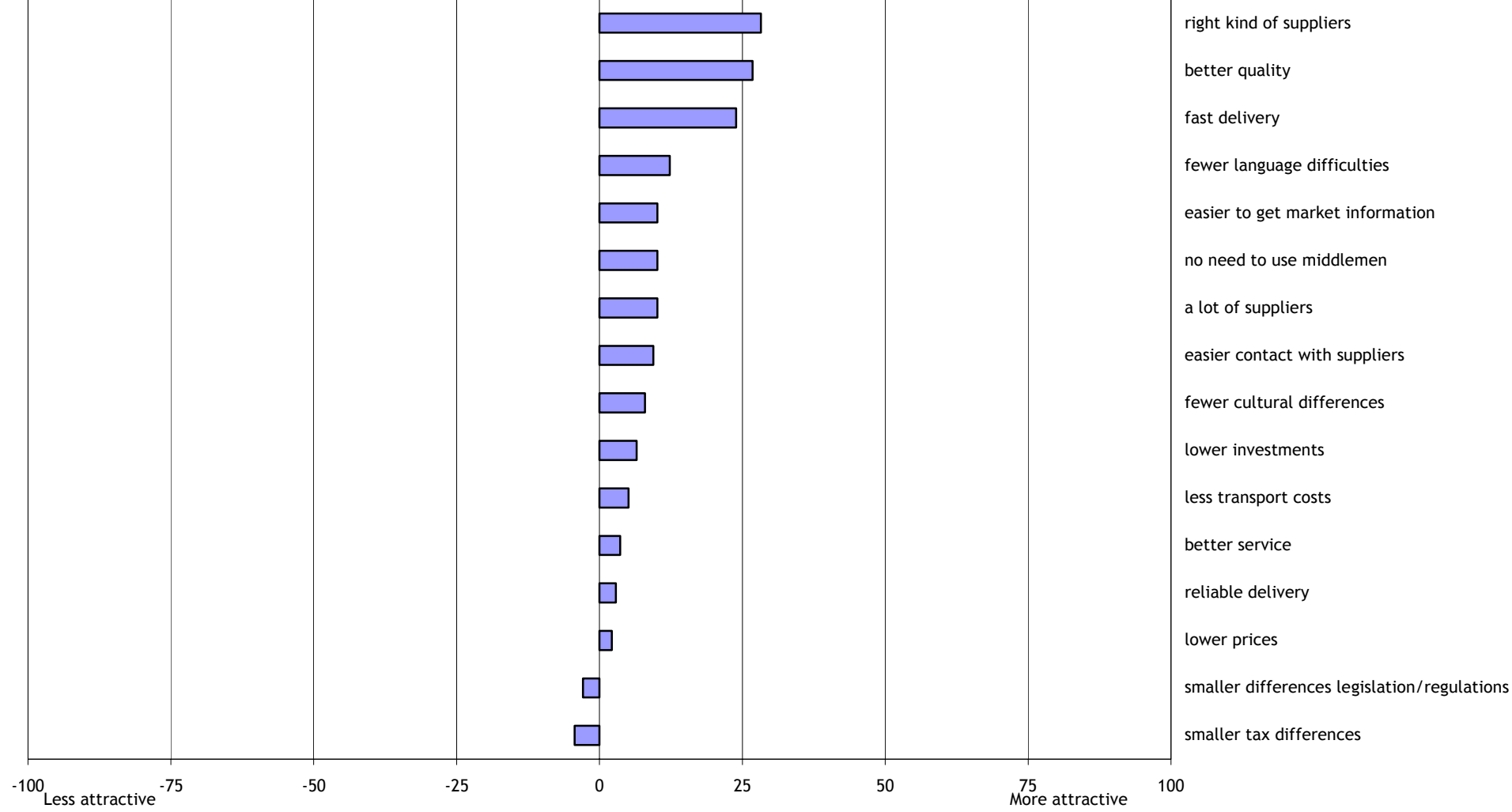
Not all importing businesses import from the Euregio, but Euregional import accounts for around one quarter of foreign purchases by importing companies (figure 4.3). This means that the Euregio accounts for around 12% of total purchases made by importing companies within the Euregio.

During the digital questionnaire, importing companies in the Euregio were asked how they organised the purchase of products and services from other constituent regions in the Euregio (appendix 2: question 9). Around nine out of ten importing companies appear to import directly from their own place of business. To a much lesser extent do these companies use other purchase channels such as importers, wholesalers, et cetera.

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<sup>11</sup> It should be stressed here that not all business sectors were surveyed (see section 2.2) and that it was anticipated there would be some selective non-response which could not be corrected for.

**Figure 4.4 Attractive aspects of the Euregio as an import region**



*Summarised positive and negative views with respect to statements.*

## 4.2 Attractiveness of the Euregio as an import region

As part of the digital questionnaire, companies which import products and/or services from one or more constituent regions of the Euregio - in addition to the region in which they are located - were given a number of statements with regard to the attractiveness of the Euregio as an import region in relation to other import regions<sup>12</sup>. In this section of the report, the results per constituent part have been combined to form a composite opinion about the Euregio as an import region. The regional reports contain a more detailed explanation (per region) of these opinions.

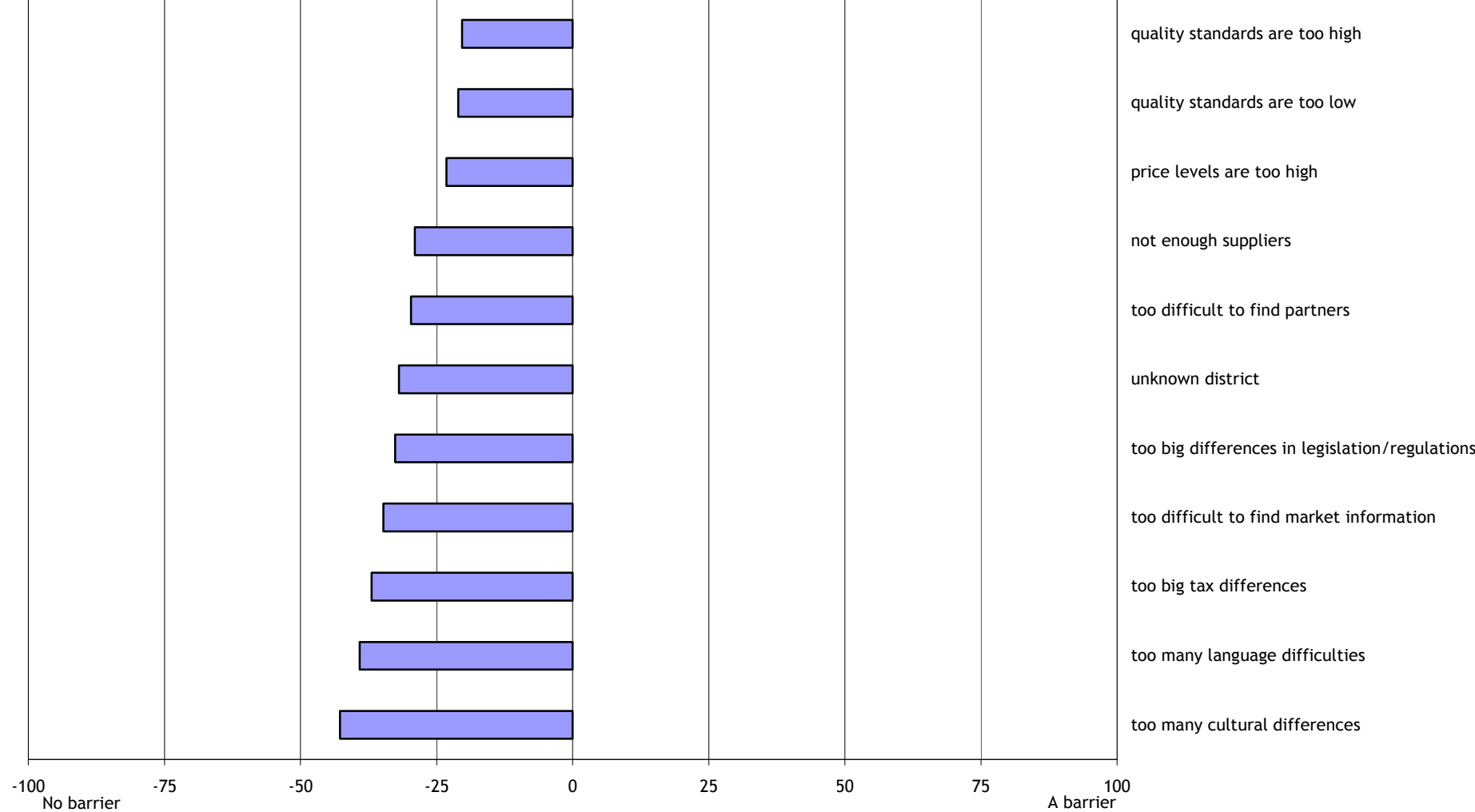
Only to a limited extent does the Euregio appear to be more attractive as an import region than other import regions (figure 4.4). Although there may be many more positive responses than negative ones to the statements, they are not overwhelmingly so. Moreover, as an import region, the Euregio appears to differentiate itself less from other regions - either positively or negatively - than as an export region (figure 3.4).

During the workshops, participating businesses indicated that price was usually the decisive factor in import and definitely not distance. As far as import prices are concerned, the Euregio is hardly different from any other import regions. It should however be noted that there are differences between the different constituent parts of the Euregio. Only when prices are comparable do the other aspects come into play. Companies importing from the Euregio are relatively positive about delivery times, the quality supplied and the type of providers. The fact that the Euregio does not differentiate itself positively from other import regions with respect to aspects of tax and regulations is not surprising. These are primarily national aspects and not regional. Furthermore, the differences between the three different countries are more or less the same as those that exist between other countries in the European and there are few differences between the constituent Belgian parts of the Euregio.

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<sup>12</sup> Appendix 2, question 5.

**Figure 4.5 Import barriers within the Euregio**



*Summarised positive and negative views with respect to statements.*

### 4.3 Import barriers within the Euregio

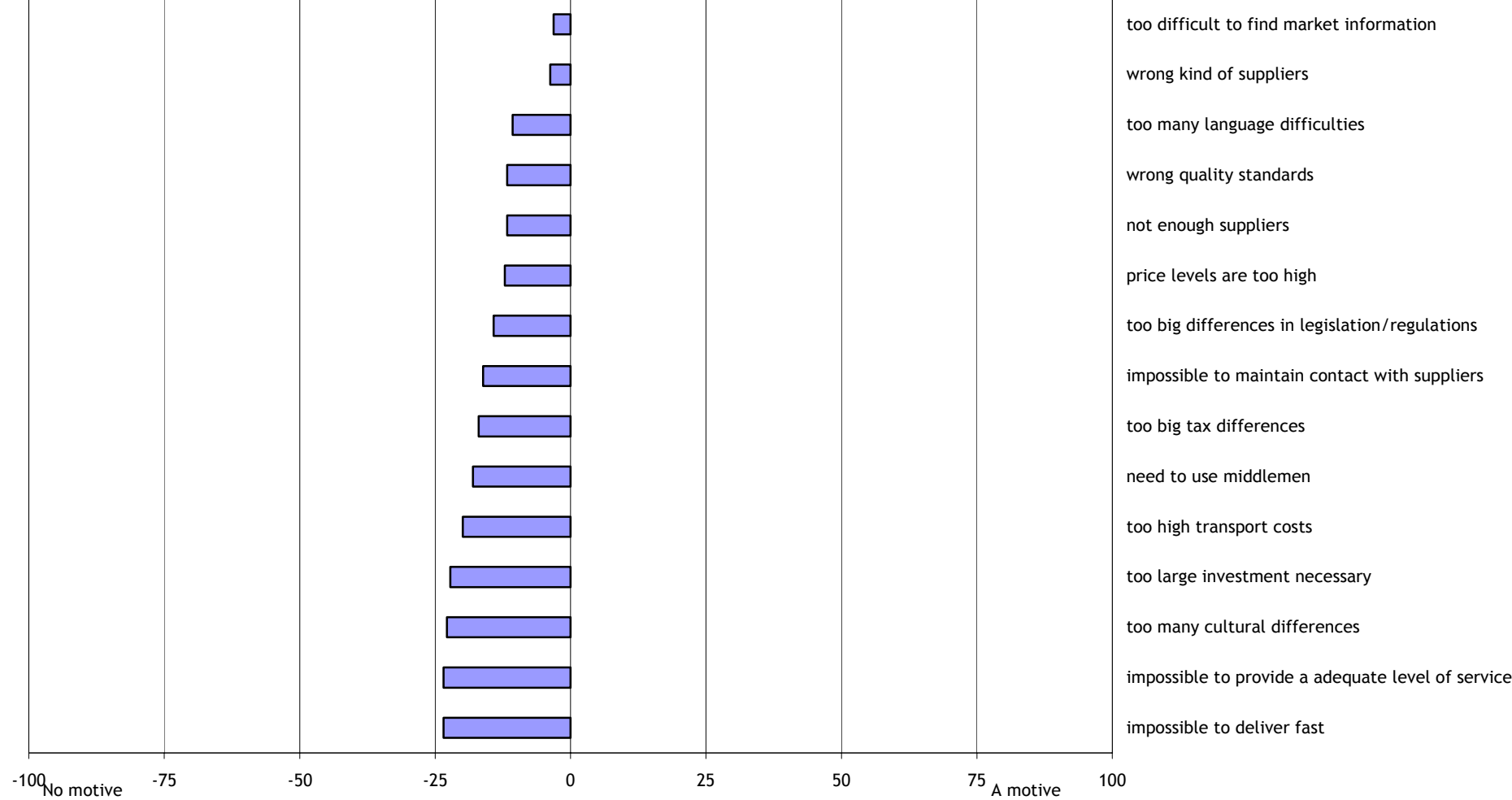
Whilst the attractiveness of the Euregio as an import region might say a great deal, it does not say everything about the import opportunities it affords to businesses. Companies which import from the Euregio were therefore given a number of statements with respect to import barriers within the Euregio<sup>13</sup>. This section of the report likewise combines the results per constituent region to form a composite opinion about the Euregio.

At first sight, there do not appear to be any import barriers within the Euregio (figure 4.5). The picture that businesses trading in the Euregio have about its attractiveness and its barriers to import appears to show a great deal of similarity. The picture with respect to barriers is slightly more positive than that for attractiveness. Anything that might otherwise be seen as an import barrier, such as differences in language, culture, tax and regulations, no longer apply for those companies once they have started with Euregional import. Seemingly, these barriers 'disappear' once businesses have sufficient market information.

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<sup>13</sup> Appendix 2, question 6.

Figure 4.6 Reasons not to import from the Euregio



Summarised positive and negative views with respect to statements.

#### 4.4 Reasons not to import from the Euregio

Companies which do not export to any of the other constituent parts of the Euregio (where they are not located) were given a number of statements with regard to the reasons they do not export to the other constituent regions<sup>14</sup>.

It is striking that there is no one general decisive reason for not importing products or services from other parts of the Euregio (figure 4.6). Distance-related aspects (such as delivery times) hardly seem to provide a reason not to import products or services from the Euregio. Relatively important reasons not to do business are the previously mentioned market-situation related aspects (such as price and supply). However, language differences and difficulty in obtaining market information would seem to be relatively important reasons for not importing from other parts of the Euregio. It should be said that a relationship exists between language and market information. Most market information is available in the native language of the suppliers.

The regional reports contain more detailed explanations of the situation per constituent region.

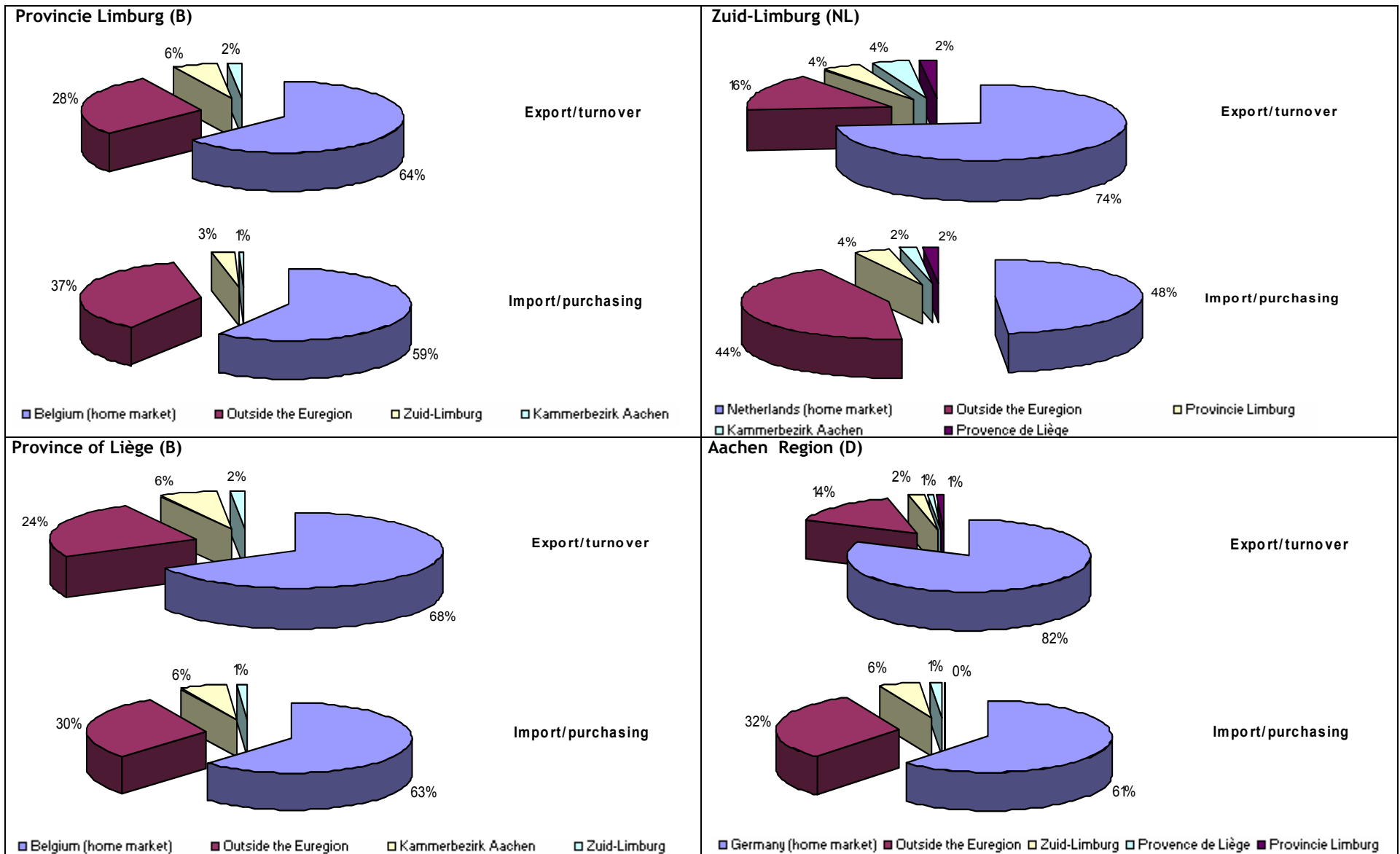
*Business A in Eupen (B) imports Aachen Region (D), but not from Zuid-Limburg (NL). In the overall opinions with respect to the attractiveness of the Euregio, the company's views about Aachen Region (D) have been included and in the opinion about reasons not to import from the Euregio the views of that same company have been taken into account with respect to the Zuid-Limburg (NL). The possibility should not be excluded that the company in question has different views about the problems of language differences in both situations.*

*Unfortunately, the response to the digital questionnaire was not large enough to filter out this distortion with respect to opinions towards the Euregio as a whole. In the regional reports, this distortion is considerably smaller.*

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<sup>14</sup> Appendix 2, question 8.

Figure 5.1 Euregional cross-frontier trade flows (turnover/purchasing) for businesses with export and/or import activities



## APPENDIX 1: WRITTEN QUESTIONNAIRE

### A. ACTIVITIES

1. To which sector does your business belong?  
(Only one answer is possible. If your business is involved in more sectors, please indicate the most important)

- **Mining and quarrying**
- **Manufacturing**
  - . food products; beverages and tobacco
  - . textiles and textile products
  - . leather and leather products
  - . wood and wood products
  - . pulp, paper and paper products; publishing and printing
  - . coke, refined petroleum products and nuclear fuel
  - . chemicals, chemical products and man-made fibres
  - . rubber and plastic products
  - . other non-metallic mineral products
  - . basic metals and fabricated metal products
  - . machinery and equipment N.E.C.
  - . electrical and optical equipment
  - . transport equipment
  - . N.E.C.
- **Construction**
- **Wholesale Trade**
- **Transport, storage and communication**
- **(Other) services**
- **Other, please specify**   
(please note)

**B. PERSONNEL**

*The following questions relate to the number of personnel working for your business. In addition to employees, also include:*

- *the owner;*
- *temporary and casual staff;*
- *any relatives working for the owner.*

2. How many people work at your place of business?

--	--	--	--	--	--	--

Persons

3. In which country do your personnel live?

*(Please tick and indicate the number)*

		No. persons:				
Germany	<input type="checkbox"/> 1					
Belgium	<input type="checkbox"/> 2					
Netherlands	<input type="checkbox"/> 3					
Other	<input type="checkbox"/> 4					

C. EXPORT

*The following questions relate to the share of turnover generated abroad. This includes turnover generated abroad from the sale of raw materials, semi-finished goods and/or end-products as well as any turnover generated abroad from the provision of services.*

4. Do you export from your place of business?

*(Please tick and indicate the share of the turnover (%))*

- Yes  1 Please specify: 

--	--	--

 % of turnover
- No  2 **Go to question 7**

5. To which countries does your place of business export?

*(Please tick and indicate the share of the turnover (%))*

- Germany  1 Please specify: 

--	--	--

 % of turnover
- Belgium  2 Please specify: 

--	--	--

 % of turnover
- Netherlands  3 Please specify: 

--	--	--

 % of turnover
- Other EU countries  4 Please specify: 

--	--	--

 % of turnover
- Other non-EU countries in Europe  5 Please specify: 

--	--	--

 % of turnover
- Countries outside Europe  6 Please specify: 

--	--	--

 % of turnover

*The next question (question 6) relates to export within the Euregio Meuse-Rhine (see map attached). You need only answer this question if you indicated in question 5 that you export to Germany, Belgium and/or Netherlands.*

6a. Do you export to the German part of the **Euregio Meuse Rhine**?

*(Please tick and indicate the share of the turnover (%))*

- Yes  1 Please specify: 

--	--	--

 % of turnover
- No / not applicable\*  2

\* You indicated in question 5 that you did not export to Germany.

6b. Do you export to the **Belgian** part of the **Euregio Meuse Rhine**?

*(More than one answer is possible. Please tick and indicate the share of the turnover (%))*

- Yes , to the French-speaking and/or German-speaking region  1 Please specify: 

--	--	--

 % of turnover
- Yes , to the Dutch-speaking region  2 Please specify: 

--	--	--

 % of turnover
- No / not applicable\*  3

\* You indicated in question 5 that you did not export to Belgium.

6c. Do you export to the **Dutch** part of the **Euregio Meuse Rhine**?

*(Please tick and indicate the share of the turnover (%))*

- Yes  1 Please specify: 

--	--	--

 % of turnover
- No / not applicable\*  2

\* You indicated in question 5 that you did not export to Netherlands.

**D. IMPORT**

*The following questions relate to the share of costs for items purchased abroad. This includes both the purchase of raw materials, semi-finished goods and/or end-products abroad as well as the purchase of services abroad.*

7. Do you import from your place of business?  
 (Please tick and indicate the share of costs for items purchased abroad (%))
- Yes  1 Please specify: 

--	--	--

 % of items purchased
  - No  2 **Go to question 10**

8. From which countries does your place of business import?  
 (Please tick and indicate the share of costs for items purchased abroad (%))
- Germany  1 Please specify: 

--	--	--

 % of items purchased
  - Belgium  2 Please specify: 

--	--	--

 % of items purchased
  - Netherlands  3 Please specify: 

--	--	--

 % of items purchased
  - Other EU countries  4 Please specify: 

--	--	--

 % of items purchased
  - Other non-EU countries in Europe  5 Please specify: 

--	--	--

 % of items purchased
  - Countries outside Europe  6 Please specify: 

--	--	--

 % of items purchased

*The next question (question 9) relates to import within the **Euregio Meuse Rhine** (see map attached). You need only answer this question if you indicated in question 5 that you import from Germany, Belgium and/or Netherlands.*

9a. Do you import from the **German** part of the **Euregio Meuse Rhine**?

*(Please tick and indicate the share of costs for items purchased abroad (%))*

- Yes  1 Please specify: 

--	--	--

 % of items purchased
- No / not applicable\*  2

\* You indicated in question 8 that you did not import from Germany.

9b. Do you import from the **Belgian** part of the **Euregio Meuse Rhine**?

*(More than one answer is possible. Please tick and indicate the share of items purchased (%))*

- Yes , from the French-speaking and/or German-speaking region  1 Please specify: 

--	--	--

 % of items purchased
- Yes , from the Dutch-speaking region  2 Please specify: 

--	--	--

 % of items purchased
- No / not applicable\*  3

\* You indicated in question 8 that you did not import from Belgium.

9c. Do you import from the **Dutch** part of the **Euregio Meuse Rhine**?

*(Please tick and indicate the share of costs for items purchased abroad (%))*

- Yes  1 Please specify: 

--	--	--

 % of items purchased
- No / not applicable\*  2

\* You indicated in question 8 that you did not import from Netherlands.

## E. TURNOVER

10. How much was your turnover in 2002?

- Yes , please specify:

< € 50,000  1

€ 50,000 - € 250,000  2

€ 250,000 - € 500,000  3

€ 500,000 - € 2,500,000  4

€ 2,500,000 - € 10,000,000  5

€ 10,000,000 - € 25,000,000  6

€ 25,000,000 - € 50,000,000  7

€ 50,000,000 - € 100,000,000  8

> € 100,000,000  9

- No  10

## F. FOLLOW-UP SURVEY

*A follow-up survey will be carried out next year. This follow-up survey will also include a written questionnaire, which will contain additional and more open questions than this questionnaire.*

11a. Would you be willing to take part in a follow-up survey?

- Yes  1

- No  2

11b. If so, please would you give us your most important details below?  
*(f the information on the label is incorrect, please could you correct the label)*

- Name of contact person: \_\_\_\_\_

- Telephone number: \_\_\_\_\_

- Email address: \_\_\_\_\_

## APPENDIX 2 DIGITAL QUESTIONNAIRE

(EXCLUSIVELY REFERRALS)

### PLACE(S) OF BUSINESS

1. In which of the following parts of the Euregio Meuse-Rhine is your place of business?  
(This includes main place of business and additional places of business, so more than one answer is possible)

- The German part	<input type="radio"/>
- The Dutch part	<input type="radio"/>
- The Belgian part - Flanders (Dutch speaking)	<input type="radio"/>
- The Belgian part - Wallonia (French speaking)	<input type="radio"/>
- The Belgian part - German speaking community	<input type="radio"/>

### EUREGIONAL TRADE: IMPORT AND EXPORT

2. To which regions of the Euregio Meuse-Rhine, where you have no place of business, do you sell your product(s) and/or service(s)?

- The German part	<input type="radio"/>
- The Dutch part	<input type="radio"/>
- The Belgian part - Flanders (Dutch speaking)	<input type="radio"/>
- The Belgian part - Wallonia (French speaking)	<input type="radio"/>
- The Belgian part - German speaking community	<input type="radio"/>

3. From which regions of the Euregio Meuse-Rhine, where you have no place of business, do you buy your product(s) and/or service(s)?

- The German part	<input type="radio"/>
- The Dutch part	<input type="radio"/>
- The Belgian part - Flanders (Dutch speaking)	<input type="radio"/>
- The Belgian part - Wallonia (French speaking)	<input type="radio"/>
- The Belgian part - German speaking community	<input type="radio"/>

**EUREGIONAL SALES** (*Euregional sales are understood to mean the sale of products to other constituent regions of Euregio*)

4. How do you organise your **Euregional sales**?  
(Please tick the correct answer; more than one answer is possible)

	Constituent regions				
	German	Dutch	Belgian		
			Flanders	Wallonia	German speaking
- Direct sales from main place of business	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Via local agent(s) / distributors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Via franchiser(s) / licensees	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Via importer / wholesaler	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Via partnership / joint-venture	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Via our own place of business in that region	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
- Other (please specify)					

For each constituent region of the Euregio, please indicate to what extent you agree or disagree with the statements below.  
 1 = agree 2 = neither agree nor disagree 3 = disagree 4 = don't know or not applicable

5. The Euregio is an interesting export market than *other* markets for the sale of our products because:

	Constituent region				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
- the differences in regulations are smaller	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- the differences in tax systems are smaller	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we have lower transport costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can deliver more quickly	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can deliver more reliably	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can provide a better service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there are more customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there are the right type of customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can enjoy better relations with our customers there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we do not have to use intermediaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we don't need to invest as much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there are fewer cultural differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we experience fewer language problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we are able to obtain market more easily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can get higher prices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there is less competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- supply there is lower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- more value is attached to our quality (product/service)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other reasons (please specify)					

6. For each constituent region of the Euregio, please indicate to what extent you agree or disagree whether the factors below form a barrier to the sale of products.

1 = agree 2 = neither agree nor disagree 3 = disagree 4 = don't know or not applicable

	Constituent regions				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
<b>General</b>					
- unfamiliarity with the region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we know no partners in this region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we cannot find any partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- differences in regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- differences in tax systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- difference in language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- difference in culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (too) difficult to get hold of the right market information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Sale of products, goods and services</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (too) much competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (prices are (too) low	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- quality standards (products and services) are (too) high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- quality standards (products and services) are (too) low	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

7. Are there any other important barriers to Euregional export that you feel are missing from the list above?

- Yes. For us, another important barrier for the German region is: .....
- Yes. For us, another important barrier for the Dutch region is: .....
- Yes. For us, another important barrier for the Flemish (Dutch-speaking) region is: .....
- Yes. For us, another important barrier for the Wallonian (French-speaking) region is: .....
- Yes. For us, another important barrier for the German-speaking region of Belgium is: .....
- No. All important barriers have been mentioned.
- No. I do not experience any barriers.

For each constituent region of the Euregio, please indicate to what extent you agree or disagree with the statements below.  
 1 = agree 2 = neither agree nor disagree 3 = disagree 4 = don't know or not applicable

8. The Euregio is not a market for the sale of our products:

	Constituent region				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
- because we don't export at all (yet)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of differences in regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of tax differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of high transport costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of delivery times	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of reliability in delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of the service provision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because there are too few customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because the right customers are not there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we cannot enjoy good relations with our customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have to make use of an intermediary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have to invest too much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we find there are too many cultural differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we experience language difficulties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have difficulty in finding market information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because our prices are not accepted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because there is too much competition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because supply there is too big	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because (too) little value is attached to our quality (product/service)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of other reasons, please specify:....					

**EUREGIONAL IMPORT (*Euregional import is understood to mean the purchase of products or services from other constituent regions within the Euregio*)**

**9. How do you organise your Euregional imports?**

*(Please tick the correct answer; more than one answer is possible)*

	Constituent region				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
- Direct purchasing from place of business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Via local agent(s) / purchasers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Via importer / wholesaler	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Via partnership / joint-venture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Other, please specify:....					

For each constituent region of the Euregio, please indicate to what extent you agree or disagree with the statements below.  
 1 = agree 2 = neither agree nor disagree 3 = disagree 4 = don't know or not applicable

10. The Euregio is an interesting import market than *other* markets for the import of our products because:

	Constituent region				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
- the differences in regulations are smaller	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- the differences in tax systems are smaller	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we have lower transport costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can get quicker deliveries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we are guaranteed good reliability in delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can get a better service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there are more suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there are the right type of suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there is sufficient supply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we can enjoy better relations with our suppliers there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we do not have to use intermediaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we don't need to invest as much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- there are fewer cultural differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we experience fewer language problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we are able to obtain market more easily	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we pay lower prices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we get the right quality (product/service)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- other reasons, please specify.....					

11. For each constituent region of the Euregio, please indicate to what extent you agree or disagree whether the factors below form a barrier to the import of products.

1 = agree 2 = neither agree nor disagree 3 = disagree 4 = don't know or not applicable

	Constituent region				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
<b>General</b>					
- unfamiliarity with the region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we know no partners in this region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- we cannot find any partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- differences in regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- differences in tax systems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- difference in language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- difference in culture	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (too) difficult to get hold of the right market information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Import of products, goods and services</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (too) many suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- (prices are (too) high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- quality standards (products and services) are (too) high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- quality standards (products and services) are (too) low	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Are there any other important barriers to Euregional import that you feel are missing from the list above?

- o Yes. For us, another important barrier for the German region is: .....
- o Yes. For us, another important barrier for the Dutch region is: .....
- o Yes. For us, another important barrier for the Flemish (Dutch-speaking) region is: .....
- o Yes. For us, another important barrier for the Wallonian (French-speaking) region is: .....
- o Yes. For us, another important barrier for the German-speaking region of Belgium is: .....
- o No. All important barriers have been mentioned.
- o No. I do not experience any barriers.

For each constituent region of the Euregio, please indicate to what extent you agree or disagree with the statements below.  
 1 = agree 2 = neither agree nor disagree 3 = disagree 4 = don't know or not applicable

13. The Euregio does not form an import market for us:

	Constituent region				
	German	Dutch	Belgian		
			Flemish	Wallonian	German-speaking
- because we don't import at all (yet)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of differences in regulations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of tax differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of transport costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of delivery times	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of reliability in delivery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of the service provision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because there are (too) few suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because the right suppliers are not there	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because the level of supply is not big enough	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we cannot enjoy good relations with our suppliers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have to make use of an intermediary	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have to invest too much	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we find there are too many cultural differences	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we experience language difficulties	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have difficulty in finding market information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because we have to pay prices that are (too) high	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because the quality (of the product/service) is (too) poor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- because of other reasons, please specify:....					

## CONCLUSION

14. Would you like to receive a digital summary of the report after the study has been completed?

Yes	No	
<input type="radio"/>	<input type="radio"/>	

15. Would you like to be kept informed about export and import in the Euregio by your own chamber of commerce?

Yes	No	
<input type="radio"/>	<input type="radio"/>	