Fehmarnbelt Business Barometer

Summary Report - Survey #1

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Fehmarnbelt

Business Barometer

Summary report – Survey #1

Autumn 2012

Roskilde University – ENSPAC

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Preamble

The following report is the first of an annual series and it summarises the results of a survey carried out during the 3rd quarter of 2012 by Roskilde University's ENSPAC Institute, in cooperation with Femern A/S and the Green STRING Corridor project, which is part of the European Union's INTERREG IV A programme. The information contained in this report highlights the main results obtained by the survey; for in depth information please refer to the appendices.

Introduction

When the Fehmarnbelt Fixed Link between Germany and Denmark opens, it will create considerable potential for growth, regional development, business opportunities and increased cross-border cooperation between companies and institutions because of the ease of access between Central and Northern Europe. The regions closest to the underwater tunnel across the Fehmarnbelt and the companies that are active in them, are the ones with the greatest potential to be affected. Although there is the positive potential for growth, development and cooperation, there is also the possibility that differences between the regions such as the tax system, labour costs, purchasing power and other variables may cause an imbalance in the relative attractions of doing business, company migration and market competition.

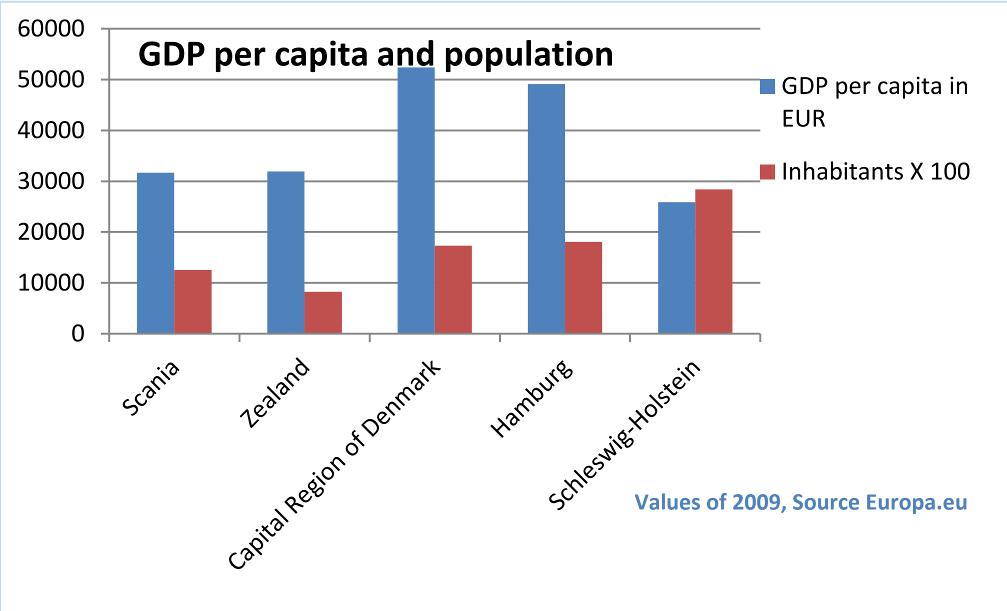
Quick Demographics:

The population in the five affected regions totals 8,447,000 inhabitants distributed as follows:
The Capital Region of Denmark – 1,730,000;
Zealand Region – 821,000;
Scania Region – 1,250,000;
Schleswig-Holstein – 2,839,000 and Hamburg 1,806,900.

The total GDP for all the regions in 2009 was 304,685 million EUR. Hamburg had the highest with 83,736 million EUR while Region Zealand had the lowest with 24,300 million EUR.

Source: Europa.eu

It is extremely important to attempt to assess in advance, which of these effects will occur, the extent to which different business sectors are preparing themselves and what their expectations are for the future. The ENSPAC Institute of Roskilde University has, in partnership with Femern A/S and the INTERREG IV-A project Green STRING Corridor, carried out a survey among businesses located in the regions of Scania in Sweden; the Capital Region of Denmark and Region Zealand in Denmark; and the Länder Schleswig-Holstein and Hamburg in Germany in order to understand how local businesses, and ultimately the regions themselves, will be affected by the future fixed link.



Method[1]

The Fehmarnbelt Business Barometer is an internet based survey consisting of 10 main questions and co-related sub-questions, which was distributed to companies with more than 100 employees in the regions of Scania, Capital Region of Denmark, Region Zealand, Schleswig-Holstein and Hamburg. In order to complete the questionnaire, knowledge of past, present and future company strategy and perspectives is required; therefore it has been addressed to the top tier of management of the businesses (CFO or CEO). [2]

Apart from "taking a snapshot" of the companies, the objective of the survey is to observe the changes in strategy and perspectives over time towards when the Fehmarnbelt tunnel opens. As a result, the survey is distributed and the data collected and analysed once a year in such a way that the figures from the previous surveys can be compared with the new data. In order to optimise the comparison of results over time, the intention is that, in each succeeding questionnaire, the respondents are able to see their answers from the previous year.

For the first survey, the questionnaires were sent to businesses during August 2012 with the data being examined over the following month. The handling of data has been done using the Systat program.

Reach

The questionnaires have been distributed to a total of 2,095 companies in the five interest regions. The number of questionnaires distributed to each region was the following:

Questionnaires distributed per region:					
Region	Scania	Zealand	Capital Denmark	Hamburg	Schleswig-Holstein
Questionnaires	229	110	598	698	460

The proportion of respondents who completed the questionnaire was 3.53%, i.e. 74 in total, distributed in the five regions in this manner:

Respondents per region:					
Region	Scania	Zealand	Capital Denmark	Hamburg	Schleswig-Holstein
Respondents	3.93%	9.09%	5.18%	0.86%	3.91%

[1] For the complete methodology, refer to appendix 1
[2] For the complete questionnaire, refer to appendix 2

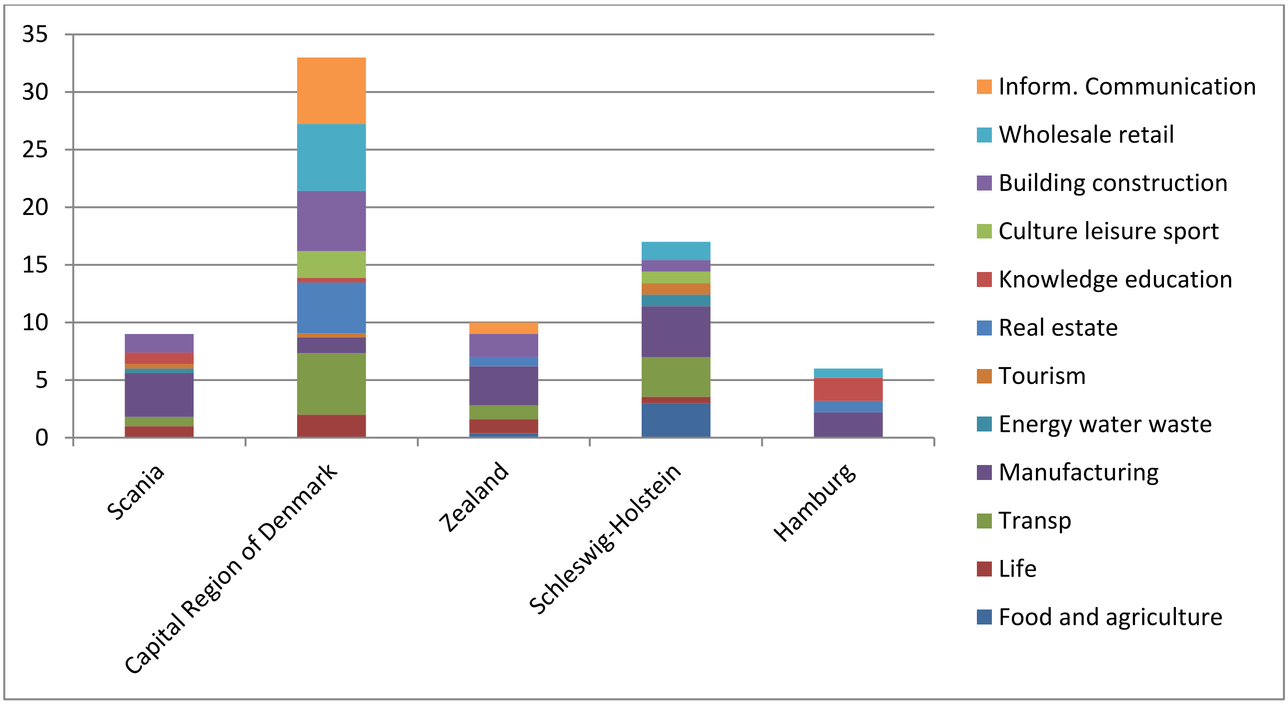
When answering the background information part of the questionnaire, the respondents were able to indicate the sector in which their company operated. It was also possible to choose more than one sector and give each an equivalent weight, for example: *Company "X" operates in the field of communication, but part of its work is related to consulting.* In this case, the respondent could indicate, in percentage values, which of the activities predominated in the operation. The relative values have been considered in the analysis and the sectors to which the questionnaires were distributed were:

- Food and agriculture;
- Life-Science and health;
- Transport and logistics;
- Manufacturing;
- Energy, water and waste;
- Tourism;
- Real estate services;
- Knowledge production and education;
- Culture leisure and sport;
- Building and construction;
- Wholesale and retail;
- Information and communication.

The ENSPAC Institute

The Department for Environmental, Social and Spatial Change of the Roskilde University conducts research and offers undergraduate and graduate programmes in the fields of Geography, Technological and Socio-Economic Planning, City Planning, Work Life and Health Promotion. For more information visit: www.ruc.dk/institutter/enspac

Fehmarnbelt Business Barometer – Participants according to region and sector



In this graph, the sector to which each company belongs was indicated by the respondent and relative values were given when a company belonged to more than one sector.

Results

The following section presents an overview of the current situation regarding turnover, export, import and employment; and then the future expectations of businesses with the same variables at the time of the expected opening of the Fehmarnbelt Fixed Link. This section also touches upon the current and foreseeable challenges for companies in the five different regions. For more graphics and raw data, please refer to appendices 4 and 5.

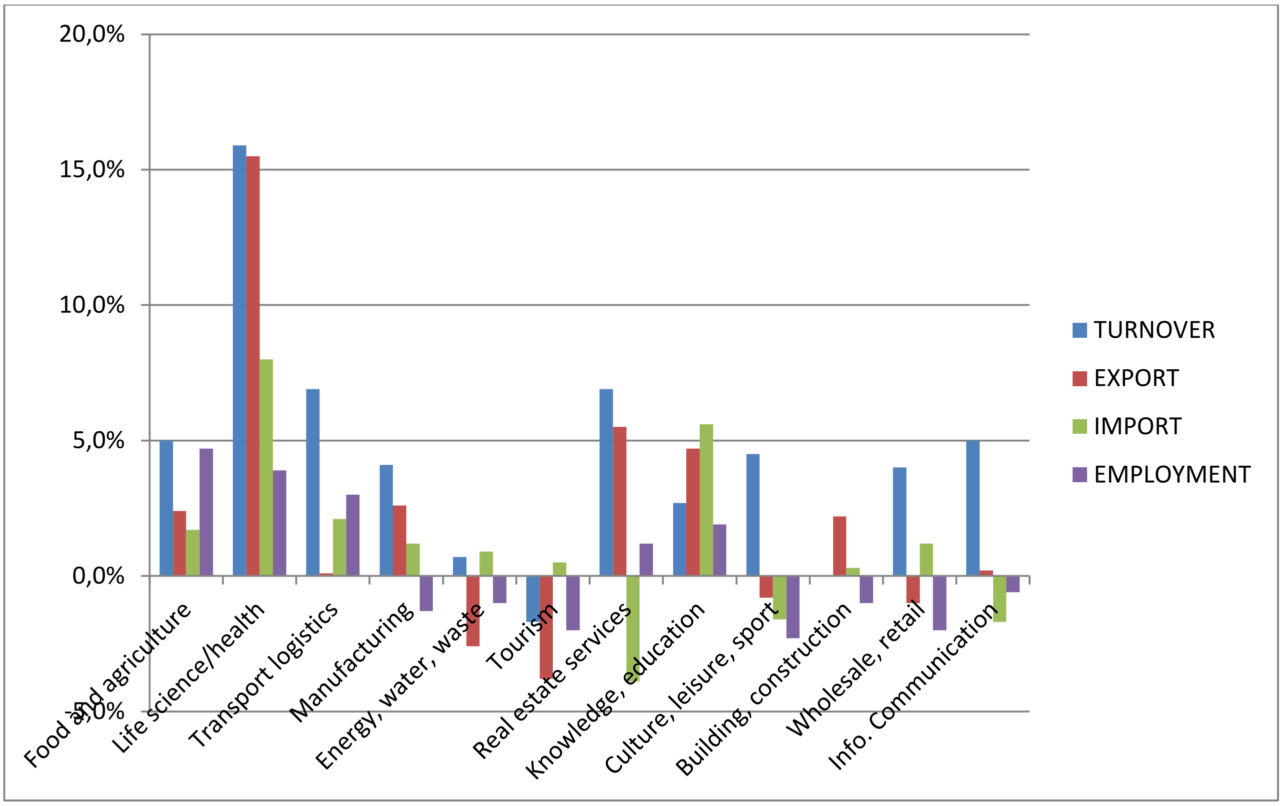
Due to the low response rate, the results must be interpreted with great care, and cannot be seen as representative of either the regions or the industrial sectors – they simply say something about the companies who actually responded.

The near future

Regarding the short term expectations for turnover, import, export and employment for the next 12 months, the companies in all the regions expect growth from 1% to 7.5% on average. The only exception is Region Zealand, which expects a reduction in job offers for the participating businesses on average. Region Zealand is also the one which presents the lowest results for expected turnover for the next year with below average, 2.5% growth. On the other hand, the two German regions, Hamburg 7.5% and Schleswig-Holstein 6.5%, expect above average growth in turnover.

Taking into consideration the same variables but this time regarding the business sector, there are more rational differences. Life Sciences and Health show good short term perspectives, especially with regard to volume of business (turnover) and export. In contrast, there are poor expectations in tourism, energy, water and waste, culture, leisure and sport, wholesale and retail as well as information and communication.

Fehmarnbelt Business Barometer – Short term expectations by sector



The size of the sample for each sector is important when interpreting the graph above and might explain some of the spikes

The future after the fixed link opens

In this section we put the current situation side by side with the perspectives on cross-border cooperation after the tunnel has opened. On the question of "cross-border cooperation," the Capital Region of Denmark, Region Zealand and Scania have responded in the context of their cooperation with Northern Germany. For the regions of Hamburg and Schleswig Holstein, the response was in the context of the Øresund Region.[3]

Cross-border cooperation

Taking into account the current situation, the strategic importance of cooperation between the companies and the expected cross-border cooperation after the tunnel opens; the various sectors seem to expect an increase in cross-border cooperation to a considerable extent.

Femern A/S

The Danish Transport Ministry owns Femern A/S which is the enterprise responsible for the fixed link across the Fehmarnbelt. The enterprise operates under the name "Sund&Bælt Holding A/S", which is also responsible for the Great Belt Bridge.
For more information visit: www.femern.com

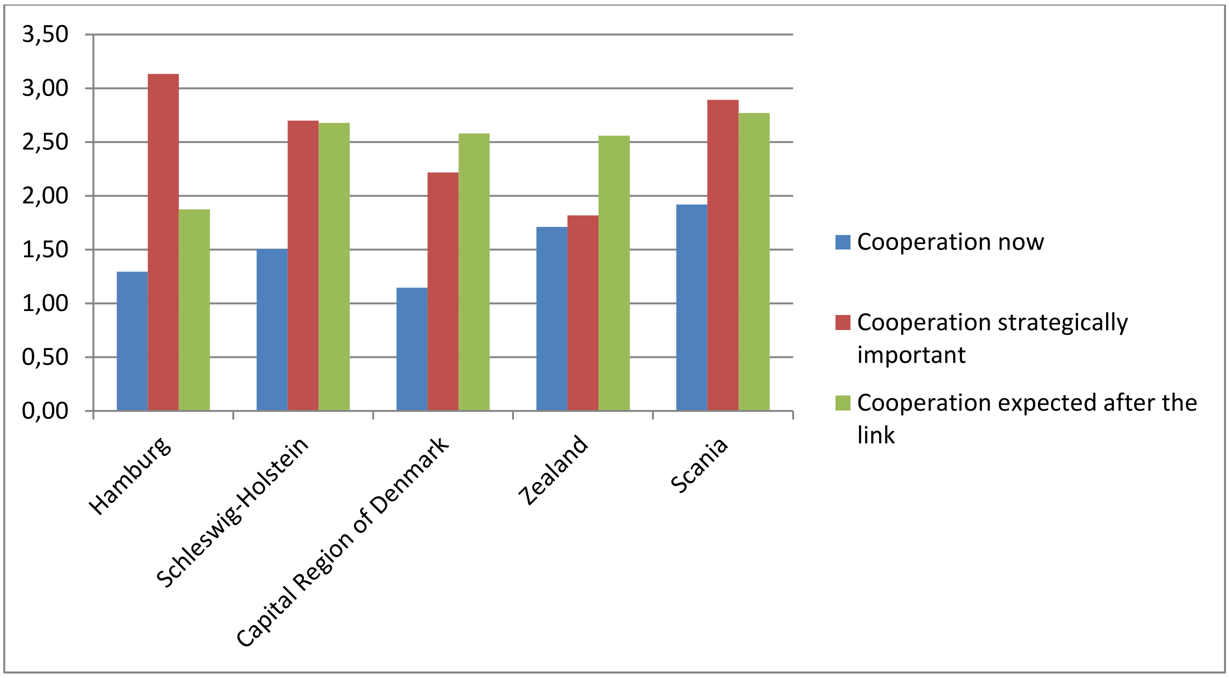
[3] Øresund Region is a transnational region formed by Region Zealand and Capital Region of Denmark in Denmark and Region Scania in Sweden.

According to the respondents, knowledge and educational institutions are the ones with the highest degree of cooperation nowadays and this sector is expected to have the largest growth in the years following the fixed link inauguration.

On a 7 point scale, zero being “no cooperation at all” and 6 being a “very high degree” of cooperation, the knowledge production and education sector currently shows almost 3 points for cross-border cooperation with an expected increase to 5 points. The manufacturing sector also presents a considerable increase in cooperation in the years following the opening of the fixed link. The energy, water and waste sector presented extremely high results for increase in cooperation, but this finding is based on a very small number of responses.

If we ignore the sectors and only take into account the region in which the companies are located, we can see general expectations for increased cross-border cooperation. Hamburg, which along with Capital Region of Denmark, could be considered as the most “global” of the regions, is the place where cross-border cooperation is regarded as the most strategically important. The Capital Region of Denmark, on the other hand, is back in 4th place among the five for the same set of findings. More conclusions can be drawn from the following graph:

Fehmarnbelt Business Barometer – Cross-border cooperation: current; strategic; and after the fixed link opens



Note the Capital Region of Denmark with the lowest current cross-border cooperation, as considered by the companies

Cooperation activities

The respondents were able to choose from a list and/or name one or more activities that represent their collaboration with partners across the border. They were also asked to name an activity that was strategically important to them as well as activities that are expected to increase or decrease after the tunnel opens. From the three perspectives (current, strategic and future), the "volume" of cooperation does not seem to vary much across the different activities.

The current, strategic and future activity valued as the most important was "export." To be able to have meetings across the border was also considered an important activity, but there was no change regarding the before/after the tunnel opening in any of the above. Other activities mentioned were: Import; Marketing; Knowledge Exchange; and Workforce and Agency (subsidiary office).

The Green String Corridor

The EU Interreg IV A project intends to facilitate cooperation between businesses and public institutions in the STRING region, while promoting innovative transport and logistics solutions.

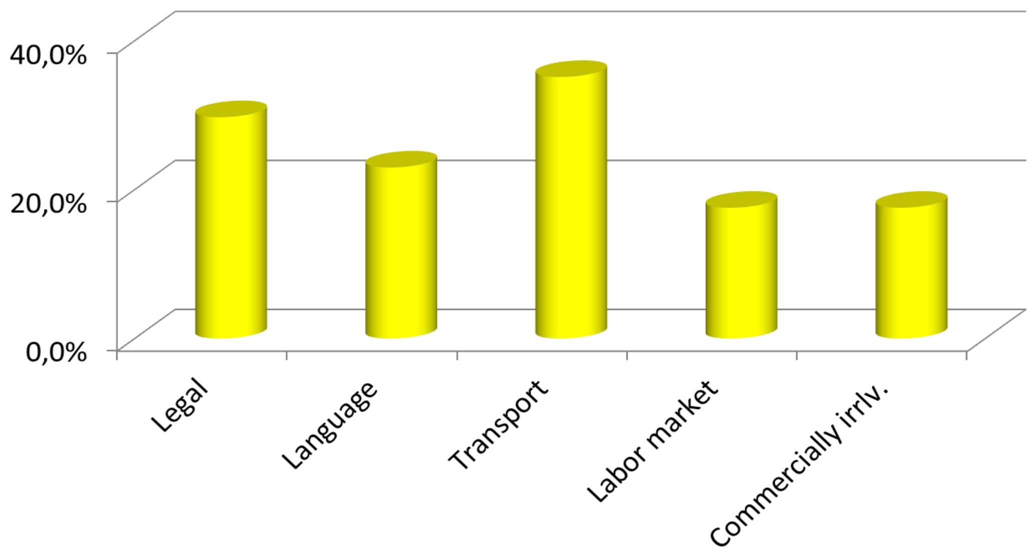
For more information please visit: www.stringcorridor.org

Barriers

In the previous section, we saw that cross-border activity, as considered by the companies today, does not seem to vary much in the future. On this issue, the respondents were asked to identify the barriers to cooperation.

The companies considered transport to be the most important barrier. Although legal issues and language barriers between the regions were also considered, the transport time over the Fehmarnbelt and, in consequence, the increased cost appears to be a deciding factor. Other barriers mentioned were the labour market and commercial irrelevance.

Fehmarnbelt Business Barometer – Barriers against increased cooperation



A fixed link can tackle directly the largest barrier for cross-border cooperation

Millibars and Hectopascals – Selected excerpts from the Barometer Survey[4]

This section highlights some of the answers given by the respondents to open questions in the survey. Due to the fact that the open questions did not entail a mandatory answer, these inputs are random but can contribute to a better understanding of companies' expectations and needs.

"How will a fixed link across the Fehmarnbelt contribute to your company's cooperation with Northern Germany/Øresund Region?"

"Maybe slightly cheaper transport"

"Easier transport"

"Increase in construction activities"

"Do you have any suggestions for actions to be implemented that could make the upcoming fixed link contribute to the success of your company?"

"Common activities could be arranged in the field of culture and sports… Collaboration between the Royal Danish Theatre and the Elbe Symphony, Cooperation between the zoos, Hamburg Technical Museum and the Danish Experimentarium… Make common exhibitions"

[4] The statements were given in the respondents' original language and freely translated for this report.

"Transport should be synchronised with the Øresund link, price is very important"

"There is no clarity about how the long-term use of the local area around the Fehmarnbelt link will be affected. No overall framework is reported. One might fear a collapse of the structure and lack of organisation. There seems to be no vision about the long-term and lasting growth opportunities combined with the necessary actions in the area to house crews, etc. during the construction phase."

"Branch specific forums should be organised to get to know each-other"

"No, our business is not dependent on a Fehmarnbelt Fixed Link. But the region would benefit from such, and our company may do too in the long term through secondary effects."

"Eventually open a subsidiary in Northern Germany"

"More flexibility regarding labour market relations/taxes"

"We look forward to being suppliers for the construction phase"

"More information about suppliers/deliverers from Northern Germany"

"Quick implementation"

"*Highway to Næstved*"

Conclusion

There are different ways in which the survey can be interpreted. One sort of "meta-interpretation" would take into account the low number of respondents. Although more than 2,000 companies were contacted, around 200 responded and 100 replied that they would NOT like to participate. All in all, around 90% of the contacted companies did not even take any notice of the survey. The explanation for that can probably be found on the time span between now and the opening of the fixed link which is expected in 2021. The construction phase has yet to start and, as a consequence, significant media coverage, word of mouth and serious planning by the companies has yet to begin. From the response rates, it can also be seen that the companies in the Øresund Region are more interested than the German companies. The fixed link across the Fehmarnbelt is still seen as a mainly Danish project.

From the data that has been collected and analysed, it can be said that the fate of the companies in the different regions regarding the opening of the fixed link, does not yet seem to be defined. The only concrete exceptions are transport time and transport cost, which are factors that already, although the length of time before the tunnel opens, is being treated by the companies as something that can influence their operations in a material way.

What can be seen today is that there is already a considerable amount of activity across the Fehmarnbelt. Apart from the Agriculture and Food sector, other areas already work together to some extent and the tendency is for cooperation and cross-border activity to increase.

It is possible to identify rational differences from one region to another, especially when that data is cross-referenced with sector-specific findings. These major differences are inconclusive and, because of the size of the sample, it is possible that some of the very specific cross-references are not entirely reliable. In this regard, a greater number of respondents participating is needed and this is expected for the future rounds of the Fehmarnbelt Business Barometer. Once the tunnel construction phase approaches and the anticipation of an opening becomes more concrete, the interest of the companies will tend to increase and respondents will be able to have more tangible expectations.

Appendix 1

Business barometer method

Aim:

To identify strategic and commercial considerations regarding the future Fehmarnbelt tunnel among top executives within the business environment in the Øresund Region, Holstein and Hamburg. The aim is to learn about the business areas, which are of strategic interest within the context of a fixed link across the Fehmarnbelt with a view to meeting their expectations.

The method:

The survey was conducted as an internet-based questionnaire sent to senior executives in the STRING region (CEOs or CFOs).

The business barometer is structured so that it can be repeated every year as required. Roskilde University is responsible for the design and for carrying out the first round.

Choice of companies:

Initially, company data was collected through various commercial databases; *Orbis* for Germany, *Greens Erhvervsinformation* for Denmark (Business Information for Denmark) and Upplysningscentralens register *WebSelect* for Scania. In the next phase, some previously excluded companies were added within the following business areas: energy supply; information and communication; property; accountancy and consultancy; and personal services. The data collected includes: name, location, number of employees, turnover and primary sector.

The criteria for the selected companies was set at >100 employees. Initially the limit was set at “large” companies according to the EU definition (>250 employees). This definition did not produce enough companies in Denmark to achieve a good overview. The limit was, therefore, reduced to 100 employees in line with the model from Denmark’s Trade Council. The EU definition is not suitable for Denmark because Danish companies generally have fewer employees than equivalent foreign companies. Using the EU model, almost all Danish companies would be SMEs. The 100 employee limit enables enough firms in each region to be able to generalise and to exclude small companies where the probability of not having an interest in a fixed link is considered greatest. A minimum limit of 50 employees was considered, but this could not be completed within the project’s timetable and economic framework because of an excessive number of companies with over 50 employees in the German “lands” (states).

Some industry sectors, which were assumed not to have an interest in a Fehmarnbelt fixed link and border trade at regional level, were excluded beforehand. These sectors are finance, insurance, temporary employment agencies and home help agencies.

Those companies that did not disclose their number of employees were excluded because we were unable to assess whether they were over or under the limit of 100 employees.

Companies close to the Danish/German border were excluded because their regional cross-border strategy is seen as focusing on trade with Southern Jutland. The excluded areas are Nordfriesland district, Schleswig-Flensborg district and Flensburg.

Selection of respondents:

The respondent in each company was an individual at strategic level (CEO or CFO). As far as possible, the survey was sent directly to the respondent's mailbox. If it was not possible to find the respondent's own email address, the survey was sent to the company's general email address (e.g. info@....)

Collecting emails:

Missing contact details from the databases used were collected manually from the companies' respective websites. Where the respondent's email address was not available the survey was sent to the company's general email address with a request to pass on the survey to the respondent. Companies with and without the respondent's email address were put on separate lists in order to check whether this affected the outcome. The company was excluded if it proved impossible to find their website, or if the website failed to provide any email address. Around 22% of the companies were deleted as a result.

Test:

Before the survey was sent to respondents, it was tested on selected test persons from RUC and Femern A/S on several occasions to check whether the questions were understood as intended, whether there were any technical errors in the questionnaire and whether the collected data could be processed. After three test runs, the questionnaire was sent to all respondents.

Appendix 2

Complete Survey Questionnaire:

1/10 – Fehmarnbelt Business Barometer

Roskilde University carries out an annual survey of top business leaders in Northern Germany, East Denmark and Skåne with a view to identifying expectations for the fixed link across the Fehmarnbelt.

Do you wish to participate?

(1) ❑ Yes

(2) ❑ No

2/10 – Thank you for your participation in the Fehmarnbelt Business Barometer. In order that we can target future communications appropriately, please provide the following information:

Name of contact person	____________________
E-mail address of contact person	____________________
Title of contact person	____________________
The company's annual turnover (in EUR)	____________________
Number of employees in the company	____________________

3/10 – Within which sector(s) does your company/organisation operate? Please check one or several x

(1) ❑ Agriculture and food

(2) ❑ Life sciences/health

(3) ❑ Transport and logistics

(4) ❑ Manufacturing

(5) ❑ Energy, water and waste

(6) ❑ Tourism

(7) ❑ Real estate, consultancy service

(8) ❑ Knowledge creation and education

(9) ❑ Culture, entertainment and sport

(10) ❑ Building and construction

(11) ❑ Wholesale and retail trade

(12) ❑ Information and communication

(13) ❑ Other A (what?) ____________________

(14) ❑ Other B (what?) ____________________

3.1/10 – If you have indicated that you are more involved in more than sector, please provide more details as to how large a percentage of your business/organisation is accounted for by each. (approximate values)

	20%	40%	60%	80%	100%
Agriculture and food	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Life sciences/health	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Transport and logistics	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Manufacturing	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Energy, water and waste	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑

	20%	40%	60%	80%	100%
Tourism	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Real estate, consultancy service	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Knowledge creation and education	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Culture, entertainment and sport	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Building and construction	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Wholesale and retail trade	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Information and communication	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Other A	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑
Other B	(1) ❑	(2) ❑	(3) ❑	(4) ❑	(5) ❑

4/10 – Your company's expectations for the future

What expectations does your company/organisation have in terms of its turnover over the next 12 months?

(1) ❑ Increase of more than 10%

(2) ❑ Increase of around 10%

(3) ❑ Increase of around 5%

(4) ❑ Unchanged

(5) ❑ Decrease of around 5%

(6) ❑ Decrease of around 10%

(7) ❑ Decrease of more than 10%

(8) ❑ Don't know

What expectations do you have with regard to developments in your company/organisation's exports over the next 12 months?

(1) ❑ Increase of more than 10%

(2) ❑ Increase of around 10%

(3) ❑ Increase of around 5%

(4) ❑ Unchanged

(5) ❑ Decrease of around 5%

(6) ❑ Decrease of around 10%

(7) ❑ Decrease of more than 10%

(8) ❑ Don't know

What expectations do you have with regard to developments in your company/organisation's imports over the next 12 months?

(1) ❑ Increase of more than 10%

(2) ❑ Increase of around 10%

(3) ❑ Increase of around 5%

(4) ❑ Unchanged

(5) ❑ Decrease of around 5%

(6) ❑ Decrease of around 10%

(7) ❑ Decrease of more than 10%

(8) ❑ Don't know

What expectations do you have concerning developments in your company/organisation's headcount over the next 12 months?

(1) ❑ Increase of more than 10%

(2) ❑ Increase of around 10%

(3) ❑ Increase of around 5%

(4) ❑ Unchanged

(5) ❑ Decrease of around 5%

(6) ❑ Decrease of around 10%

(7) ❑ Decrease of more than 10%

(8) ❑ Don't know

5/10 – Current situation

To what extent does your company/organisation cooperate with companies/organisations in North Germany?

(1) ❑ 1 – To a large extent

(2) ❑ 2 -

(3) ❑ 3 -

(4) ❑ 4 – To some extent

(5) ❑ 5 -

(6) ❑ 6 -

(7) ❑ 7 – Not at all

6/10 – Current situation

What form does this cooperation take? Insert one or several x

(1) ❑ Import

(2) ❑ Export

(3) ❑ Head office, branch office, sales office

(4) ❑ Knowledge sharing/exchange

(5) ❑ Meetings with partners

(6) ❑ Manpower/key employees

(7) ❑ Sales promotions

(8) ❑ Other: ______________________________

6.1/10 – Current situation

What barriers do you see to possible cooperation? Check one or several x

(1) ❑ Legislation

(2) ❑ Language

(3) ❑ Transport time

(4) ❑ Labour market conditions

(5) ❑ Uninteresting in business terms

(6) ❑ Other: ______________________________

7/10 – Current situation

To what extent is Northern Germany strategically interesting to your company?

(1) ❑ 1 – To a large extent

(2) ❑ 2 -

(3) ❑ 3 -

(4) ❑ 4 – To some extent

(5) ❑ 5 -

(6) ❑ 6 -

(7) ❑ 7 – Not at all

7.1/10 – What sort of cooperation with the North German market could be of interest? Check one or several x

(1) ❑ Import

(2) ❑ Export

(3) ❑ Head office, branch office, sales office

(4) ❑ Knowledge sharing/exchange

(5) ❑ Meetings with partners

(6) ❑ Manpower/key employees

(7) ❑ Sales promotions

(8) ❑ Other: ____

8/10 – The future

To what extent will a fixed link across the Fehmarnbelt support your company/organisation's co-operation with Northern Germany?

(1) ❑ 1 – To a great extent

(2) ❑ 2 -

(3) ❑ 3 -

(4) ❑ 4 – To some extent

(5) ❑ 5 -

(6) ❑ 6 -

(7) ❑ 7 – Not at all

9/10 – The future

How will a fixed link across the Fehmarnbelt support your company/organisation's co-operation with Northern Germany? Insert one or several x

(1) ❑ More imports

(2) ❑ More exports

(3) ❑ Head office, branch offices, sales office

(4) ❑ More knowledge sharing/exchange

(5) ❑ More meetings with partners

(6) ❑ Manpower/key employees

(7) ❑ More sales promotions

(8) ❑ Other: ____

10/10 – The future

"Do you have any suggestions for actions to be implemented that could make the upcoming fixed link contribute to the success of your company?"

May we contact you for more information about your answer? Please insert your contact details below.

Thank you for your answer. We will contact you again next year. Thank you for your answer. We will not contact you again.

Appendix 3

GREEN STRING CORRIDOR

Fehmarnbelt Business Barometer

Per Homann Jespersen, Marianne Jacobsen, Clément Guasco & Jean Endres

ENSPAC, Roskilde University

Interreg IVA

Femern Sund Bælt

Fehmarnbelt Business Barometer: why?

- The fixed link will offer new opportunities for businesses and institutions across Fehmarnbelt
- Many studies have been carried out to identify the potential
- Transforming potential into reality requires action and knowledge
- The *Fehmarnbelt Business Barometer* is a way of finding out what businesses think about the opportunities

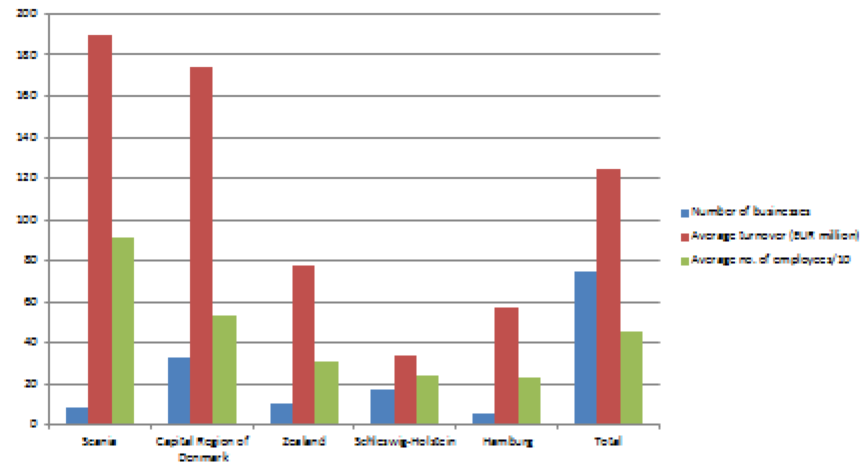
Fehmarnbelt Business Barometer: how?

- Ask business leaders how they see the opportunities for their company following the opening of the fixed link
- An internet-based survey
- Ask the same individuals annually
- Focus as much on changes in perception as on absolute values

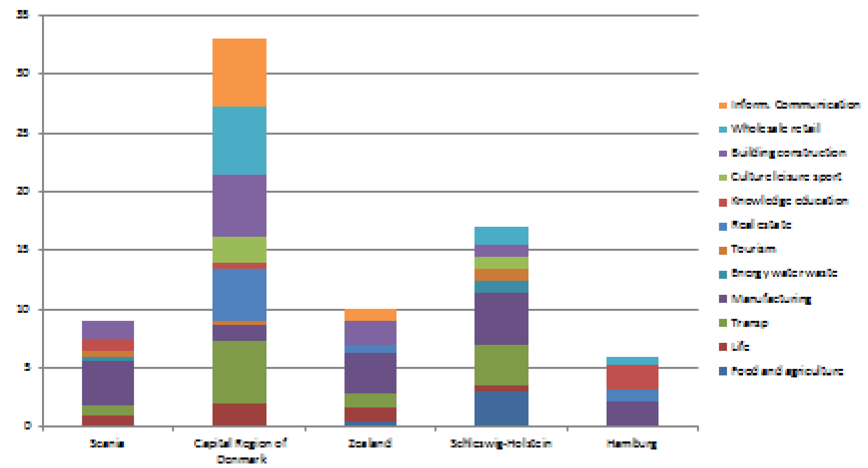
Fehmarnbelt Business Barometer - Who?

- Companies >100 employees
- CEOs and CFOs
- In five regions
  - Region Scania
  - Capital Region of Denmark
  - Region Zealand
  - (Schleswig-)Holstein
  - Hamburg
- In twelve sectors
- 2,100 e-mails – in the end only 75 respondents!
  - Highest in Zealand (9%) lowest in Hamburg (1%)

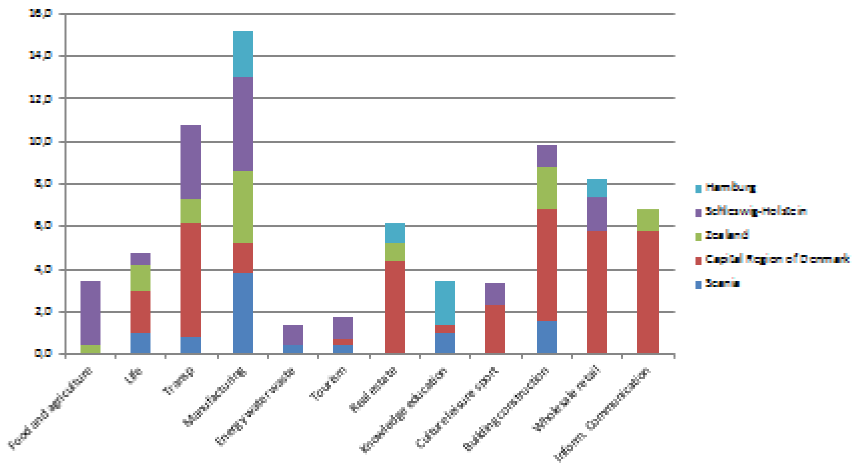
Participating businesses



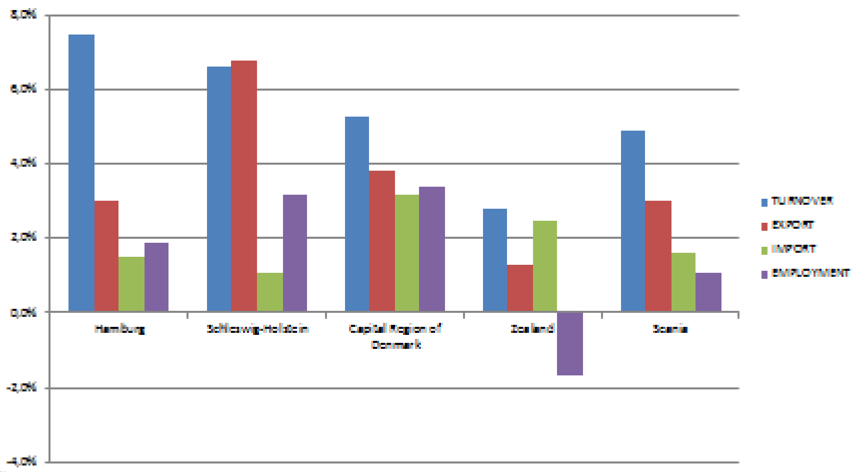
Sectors/region



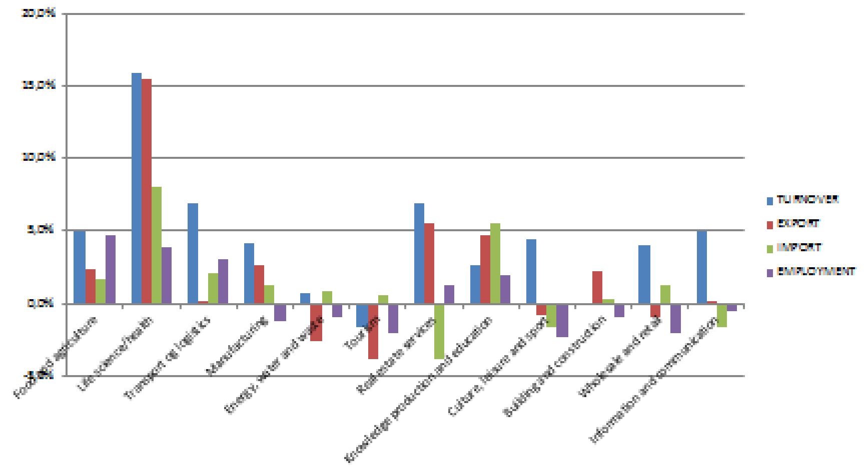
Region/sectors



Expectations re. turnover, export, import & employment



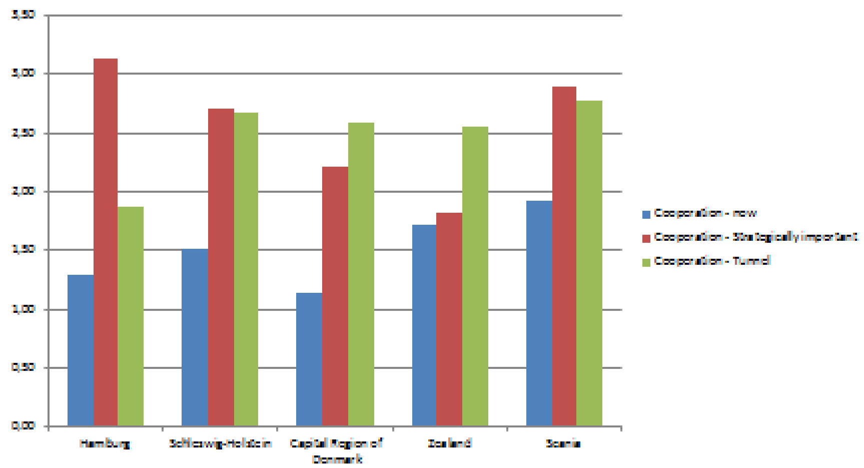
Expectations re. turnover, export, import & employment



Cooperation across Fehmarnbelt

now – strategically important – tunnel

(0: not at all, 3: to some extent; 6: to a great extent)



Cooperation across Fehmarnbelt

now – strategically important – tunnel

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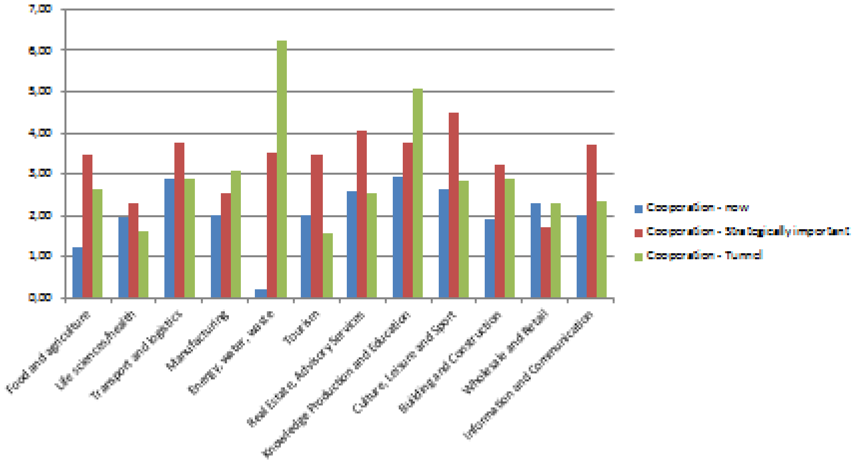
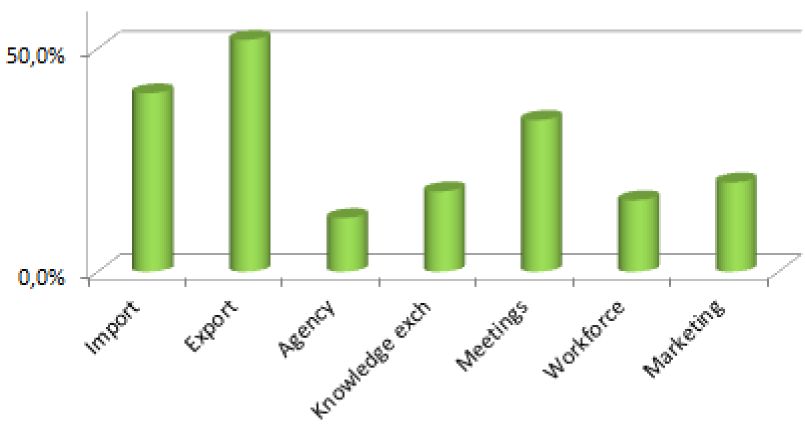
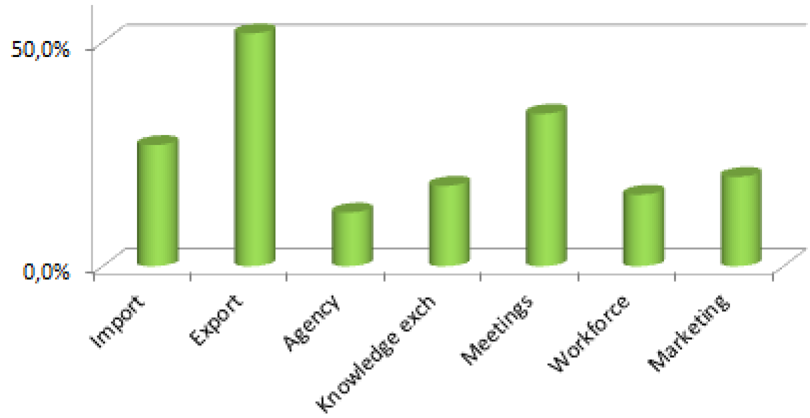


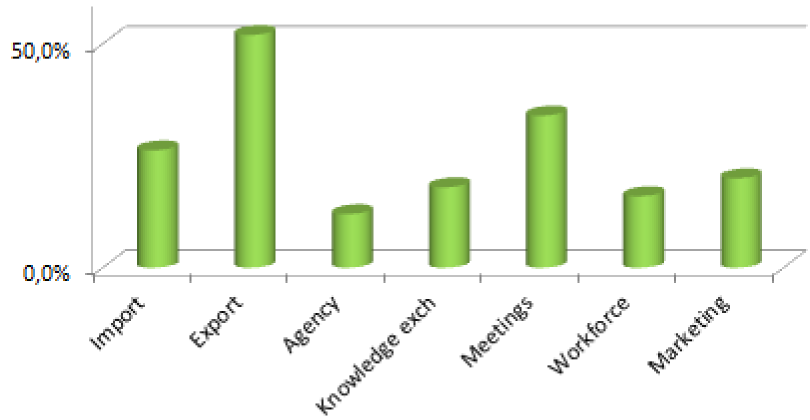
Cooperation across Fehmarnbelt - now



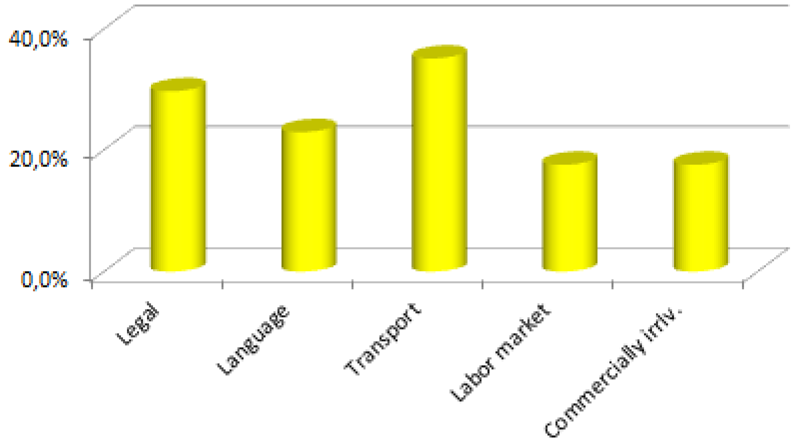
Cooperation across Fehmarnbelt - strategic



Will a fixed link support your company?



Barriers to cooperation



Some conclusions

- The companies' immediate outlook is very bleak
- Except for agriculture and food there is already a rather high degree of cooperation across the Fehmarnbelt
- Transport time is seen as the most important barrier to further cooperation
- Regional differences might be due to sampling (to be investigated further)
- More companies are needed to make the results more valid