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Internationalisation opportunities for SMEs in Mobility – Transport and Automotive ecosystem

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Table of acronyms and abbreviations

MTA	Mobility, Transport and Automotive
SME	Small and Medium-Sized Enterprises
FSTP	Financial Support to Third Parties
VSB	Very-small businesses
OECD	Economic Co-operation and Development

Executive Summary

The RESIST project deliverable D.6.2 aims to provide European small and medium-sized enterprises (SMEs), start-ups and very-small businesses (VSBs) from the European Mobility, Transport, and Automotive (MTA) ecosystem with insights into internationalisation opportunities available in the EU-27 and third countries. It analyses the current degree of internationalisation of European MTA SMEs and identifies the trends and factors influencing their global expansion.

The report presents various activities that can aid the internationalisation of European MTA-SMEs, start-ups and very-small businesses (VSBs), which can be financed by the RESIST Financial Support to Third Parties (FSTP). The study is intended to be a starting point for the RESIST Eurocluster initiative, which seeks to promote the twin transition and enhance the resilience of SMEs. The document also includes a non-exhaustive list of some of the most significant fairs and events of the MTA ecosystem in third countries. By understanding the internationalisation opportunities and the trends shaping the industry, European MTA SMEs, start-ups and very-small businesses (VSBs) can develop strategies to expand their businesses and contribute to the growth of the sector.

1. Introduction

The Mobility, Transport and Automotive ecosystem is a dynamic and rapidly evolving industry with a global reach. Due to the increasing demand for mobility and the challenges to green the industry, the ecosystem is witnessing an unprecedented level of innovation, development, and growth. European SMEs are looking to expand their reach and explore international markets to leverage their capabilities and expertise.

This document presents different internationalisation opportunities open to SMEs from the Mobility, Transport and Automotive ecosystem applying for the Financial Support for Third Parties (FSTP), foreseen by the project “REsilience through Sustainable processes and production for the European automotive InduSTry” (RESIST), co-funded by the European Union within the framework of the "Joint Cluster Initiatives (EUROCLUSTERS) for Europe's recovery". The outcomes of this deliverable have been extracted from the survey of internationalisation opportunities carried out by RESIST between December 2022 and April 2023, in-depth interviews with SMEs held between March and April 2023 and different specialised reports of the sector (please see 7. References).

1.1 Purpose of Document

The purpose of this report is, in the first place, to generally **explain the opportunities for internationalisation in the different areas of the European Mobility, Transport and Automotive ecosystem.**

Secondly, it seeks to **describe the current degree of internationalisation of European SMEs in the Mobility, Transport and Automotive ecosystem**, detail the trends and factors that influence the internationalisation of European SMEs, start-ups, and very-small businesses (VSBs), and analyse their needs to achieve their objectives.

Thirdly, the report analyses **the characteristics and opportunities in internationalisation** in selected European countries and then in non-EU third countries.

Finally, it presents activities that could contribute to the internationalisation of European MTA SMEs and that can be financed by RESIST's Financial Support for Third Parties (FSTP). In addition, as a non-exhaustive list, examples of the most important MTA ecosystem fairs in third countries are given.

The information gathered in this study help in the organization and development of the rest of activities planned to be launched in the framework of the RESIST Eurocluster initiative, aimed at supporting the twin transition and increasing the level of resilience of SMEs.

1.2 Intended audience

This deliverable is mainly addressing the following audience:

- European SMEs, start-ups, and very-small businesses (VSBs) in the Mobility, Transport and Automotive ecosystem that are interested in receiving support for internationalisation opportunities in different EU-27 and non-EU third countries that could be financed by RESIST's project Financial Support for Third Parties (FSTP).
- The RESIST consortium partners, to better understand the internationalisation opportunities for SMEs, start-ups, and very-small businesses (VSBs) in the Mobility, Transport and Automotive ecosystem and their impact on SMEs. It is valuable information that will allow them to provide the appropriate support to these companies in the framework of the internationalisation activities of the RESIST project.
- Clusters, relevant associations, and any other stakeholder working in the target ecosystem or with interest in the involved sectors, so that they can access to the main conclusions of our report, send contributions, or identify collaboration opportunities or synergies within the scope and objectives of the RESIST initiative.

2. Internationalisation in the European Mobility, Transport and Automotive (MTA) ecosystem

The Mobility, Transport, and Automotive ecosystem, with 14.6 million people employed in Europe (at least 16 million including indirect jobs)¹, is rapidly evolving with the introduction of new and greener technologies and changing consumer preferences, especially the electrification of the ecosystem. This ecosystem concentrates 1.8 million European companies, 99.7% of which are SMEs, start-ups and VSBs.

As the Commission Annual Single Market Report 2021 highlights in its analysis of the MTA ecosystem, the SMEs, start-ups and VSBs dimension must be considered. European MTA SMEs predominantly in retail (e.g., automotive sector) and are directly involved in production (being key suppliers to many large manufacturers, as they supply components and sub-assemblies). Through their flexibility, agility, and very specific expertise, they can foster innovation.

Among the challenges proposed in the above-mentioned document are the access to finance, protection of intellectual property rights and the objective of internationalisation to face the global competition. As an example of this worldwide race, EU companies are confronted with competition from Asia also in sectors where they used to be leaders. Some cases can be found in commercial cargo shipbuilding (with competition from Japan, South Korea and China) and is now happening in certain automotive markets (in terms of car market size and production, the EU is second to China). Therefore, for European MTA companies to compete, export markets are crucial to maintain leadership and to finance investments in new technologies. As extracted from the New Industrial Strategy for Europe², it is essential to ensure that the EU combines Trade Defence Instruments, taking full advantage of the competition rules of today's world, with existing Free Trade Agreements (FTAs) that have been beneficial so far. These internationalisation instruments will be key to address the imbalance challenges affecting the MTA ecosystem (e.g. price increases and delays in the supply chain of semiconductors) as noted in the Commission Annual Single Market Report 2022³.

Therefore, internationalisation provides SMEs, start-ups and VSBs in this sector with numerous opportunities to expand their customer base, increase profitability, and gain a competitive advantage in the global market. Being part of global value chains has been driven by several factors, including increasing globalization, the rise of digital technologies, and the need for companies to access new markets and customers.

A growing number of European MTA companies is expanding their operations to other countries. For example, many European car manufacturers have set up production facilities in other parts of the world, such as China, India, and the United States. This has allowed them to tap into new markets and benefit from lower production costs.

¹ European Commission (2021). *Commission Staff Working Document. Annual Single Market Report 2021*. https://commission.europa.eu/system/files/2021-05/swd-annual-single-market-report-2021_en.pdf

² European Commission (2020). *A New Industrial Strategy for Europe, COM/2020/102 final*. <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0102>

³ European Commission (2022). *Commission Staff Working Document. Annual Single Market Report 2022*. <https://ec.europa.eu/docsroom/documents/48877>

At the same time, we have also seen a rise in international collaborations and partnerships in the MTA ecosystem. For instance, European car manufacturers have teamed up with technology companies from third countries to develop new connected and autonomous vehicle technologies.

In addition, the European Union has been promoting European integration⁴ in the MTA ecosystem through various initiatives. The EU has been investing in cross-border transport infrastructure projects, such as the Trans-European Transport Network⁵ (TEN-T policy) and the Connecting Europe Facility (CEF). These projects aim to improve transport connectivity between European countries through the development of coherent, efficient, multimodal, and high-quality transport infrastructure across the EU and promote the free movement of goods and people.

Overall, internationalisation is a key feature in the European MTA ecosystem and is likely to continue to shape the industry in the coming years. Some of the best opportunities for internationalisation in the future include:

- **Emerging Markets:** European MTA SMEs, start-ups and VSBs should consider expanding into emerging markets such as India or Brazil. These markets have large populations, growing middle-class, and increasing demand for cars, electric vehicles, and public transportation.
- **Electric and Autonomous Vehicles:** the demand for electric and autonomous vehicles is rapidly increasing, presenting a significant opportunity for SMEs, start-ups and VSBs in this sector. Internationalisation into markets where governments have introduced incentives for electric vehicle adoption, such as the United States of America could be particularly interesting.
- **Smart Transportation:** including intelligent transport systems, connected cars, and smart cities, is becoming increasingly important. SMEs start-ups and VSBs with expertise in this area could expand into markets where governments and private companies are investing heavily in smart transportation, such as Singapore and Dubai.
- **Digitalisation:** Digitalisation is transforming the Mobility, Transport, and Automotive ecosystem, providing SMEs start-ups and VSBs with opportunities to offer innovative digital services and solutions. Expanding into markets with high levels of digitalisation, such as the United States and Japan, could be particularly beneficial.
- **Sustainable Mobility:** consumers are becoming more environmentally conscious, which leads to an increased demand for sustainable mobility options. SMEs could benefit from expanding into markets where there is a strong focus on sustainability.

⁴ European Commission (2021). *Creating a green and efficient Trans-European Transport Network*.

https://transport.ec.europa.eu/system/files/2023-03/Creating_a_green_and_efficient_Trans-European_Transport_Network.pdf

⁵ European Commission (2020). *Trans-European Transport Network (TEN-T)*.

https://transport.ec.europa.eu/transport-themes/infrastructure-and-investment/trans-european-transport-network-ten-t_en

Therefore, the best opportunities for internationalisation in the MTA ecosystem depend on factors such as market demand, regulatory environment, technological innovation, and international conflicts. European SMEs, start-ups and VSBs should carefully evaluate these factors before expanding into new markets to ensure that they are well positioned to succeed.

3. Identifying the main internationalisation trends, necessities, and future challenges in the MTA ecosystem

3.1 Planning and methodology used in this study

This study is based on the results of the RESIST One-Stop-Shop and internationalisation opportunities surveys, as well as recent reports on the reality and trends of the European Mobility, Transport, and Automotive ecosystem. The One-Stop-Shop survey provides insights into the needs and expectations of MTA SMEs, start-ups and VSBs regarding cross-border expansion, while the internationalisation opportunities survey sheds light on the challenges and opportunities that arise when entering new markets. These surveys have been combined with an analysis of various reports and studies on the MTA sector, including those focussing on emerging technologies, regulatory frameworks, and market trends. By considering these sources, this study aims to provide a comprehensive understanding of the current state of the MTA ecosystem and the challenges for European SMEs operating in this dynamic industry.

3.2 Current situation of internationalisation of European MTA SMEs, start-ups and VSBs

European countries are well-known for their industrial development in the Mobility, Transport, and Automotive ecosystem. The current degree of internationalisation of European MTA SMEs, start-ups and VSBs varies by country and sector. However, in globalised value chains, these companies seek to expand their markets and access new customers.

For example, in Germany, which is one of the largest MTA markets in Europe, many SMEs, start-ups and VSBs have a strong international presence. According to various studies by the OECD⁶ and the German Federal Ministry for Economic Affairs and Energy⁷, around 70% of German SMEs, start-ups and VSBs are involved in international business. They are particularly active in the fields of automotive components, commercial vehicles, and rail transport.

In Italy, another key MTA market in Europe, there has also been a growing trend towards internationalisation. Italian SMEs, start-ups and VSBs are known for their expertise in design, engineering, and manufacturing, and they have been successful in exporting their products and services to countries such as China, Japan, and the United States.

⁶ OECD (2021). *SME and Entrepreneurship Outlook 2021*.

<https://www.oecd.org/cfe/smes/Germany.pdf>

⁷ Federal Ministry for Economic Affairs and Energy (2014). *The German Mittelstand: Facts and figures about German SMEs*.

https://www.bmwk.de/Redaktion/EN/Publikationen/wirtschaftsmotor-mittelstand-zahlen-und-fakten-zu-den-deutschen-kmu.pdf?__blob=publicationFile&v=4

In France, the MTA sector is dominated by large corporations, but there are still many SMEs, start-ups and VSBs involved in international business. According to a study conducted by the French Ministry for the Economy and Finance and Industrial and Digital Sovereignty⁸, over 40% of MTA SMEs, start-ups and VSBs in France are involved in international trade, with a particular focus on the automotive and aerospace industries.

However, despite these examples of successful internationalisation, many European MTA companies still face significant barriers to enter foreign markets. These barriers can include high tariffs, lack of knowledge about local markets and regulations, cultural and language barriers, and difficulties in finding suitable partners and customers.

Following the surveys carried out by RESIST, it should be noted that many MTA SMEs, start-ups and VSBs are still consolidating their internationalisation processes within Europe, so we are going to describe the countries that stand out in the sector and the opportunities that may exist in them.

3.3 Main trends and challenges

In the following section, we will explore how different factors⁹ can influence the internationalisation of European SMEs, start-ups and VSBs in the Mobility, Transport, and Automotive ecosystem. These factors include access to potential customers and partners, as well as lack of capital, support, cultural and language differences, advice, and information.

The interviews carried out by the RESIST project show that the SMEs, start-ups and VSBs see themselves confronted with higher barriers when the internationalisation objective is focused on third countries that do not belong to the so-called Western countries (e.g. USA, Canada, Japan, etc.). Target countries with a similar culture and industrial and trade standards make doing business easier. Most of the interviewed SMEs focus their internationalisation on Western countries. They claim that it is more costly and risky to try to penetrate other markets such as Asia, Africa, and South America.

Therefore, understanding how these considerations can influence the internationalisation process can help SMEs, start-ups and VSBs better meet the challenges of expanding into new markets in third countries.

1. **Access to potential customers:** Identifying and reaching out to potential customers in new markets can be a challenge, but having access to customer data and networks can help SMEs, start-ups and VSBs overcome this hurdle. By attending international trade fairs, networking events, and business matchmaking events, MTA companies can connect with potential customers and learn more about their needs and preferences.

⁸ Ministry for the Economy and Finance and Industrial and Digital Sovereignty of France (2022). *France's 2022 Foreign Trade Figures*.

https://www.diplomatie.gouv.fr/IMG/pdf/frances_2022foreign_trade_figures_cle8aeb6c.pdf

⁹ European Commission (2020). *Advanced Technologies for Industry – Sectoral Watch. Technological trends in the automotive industry*.

<https://ati.ec.europa.eu/sites/default/files/2020-08/Sectoral%20Report%20Automotive.pdf>

2. **Access to potential partners:** It is crucial for SMEs, start-ups and VSBs to consolidate their internationalisation strategy. Building partnerships with local distributors, suppliers, and service providers can help them navigate the complexities of new markets and build a strong presence. By attending international events, companies can connect with potential partners and explore opportunities for collaboration in their countries. According to the RESIST interviews, some of the instruments that could be used to consolidate partners are partnership agreements, having a sales representative based in the country, establishing foreign branches or subsidiaries, investment in new facilities, licensing, or the creation of joint ventures.
3. **Lack of capital or funding:** It is one of the major challenges for many SMEs, start-ups and VSBs looking to expand internationally. Internationalisation can require significant investments in market research, product development, or marketing. Access to funding and capital can help companies overcome this challenge and make the necessary investments to grow their business internationally. Support from organizations such as government agencies, banks, and venture capitalists can provide SMEs with the necessary funding to be able to land in these new markets with sufficient stimulus to succeed.
4. **Lack of support and/or advice:** Many European SMEs, start-ups and VSBs lack the knowledge and experience to navigate the complexities of internationalisation. Moreover, at a time of de-globalisation where access to certain markets has become more complex (e.g. The U.S. – Mexico – Canada Agreement (USMCA)). Lack of support and advice can lead to costly mistakes and setbacks. Support from experienced professionals, such as business advisors, lawyers, and accountants, can help companies overcome these challenges and make informed decisions to penetrate new markets.
5. **Lack of information:** Lack of information is a significant barrier to internationalisation for many European MTA SMEs, start-ups and VSBs. This can include information on market trends, regulatory requirements, and cultural differences. Access to reliable information can help companies make informed decisions and avoid costly mistakes. Governments, trade associations, and business networks can provide SMEs, start-ups and VSBs with access to relevant information and resources to accurately form their internationalisation strategy.
6. **Cultural and language differences:** Lack of understanding cultural norms and business practices in the target market can result in misunderstandings and miscommunication, which in turn can translate to lost business opportunities. Similarly, language barriers can make it difficult to effectively communicate with potential customers and partners, hindering the development of relationships and the ability to negotiate deals. Therefore, SMEs, start-ups and VSBs need to invest in intercultural training and language skills to successfully navigate the challenges of expanding into new markets. However, as indicated at the beginning of the section, it should be noted that in the interviews carried out by the RESIST project, it has not been identified as one of the main barriers, since most of the third countries with which the interviewed SMEs work are Western countries.



In conclusion, access to potential customers and partners, sufficient funding, support and advice from experienced professionals to understand cultural and language differences and reliable sources of information are essential for the successful internationalisation of European MTA SMEs, start-ups and VSBs. This will be even more so if markets outside the Western countries are to be reached. The significance of each of these barriers might vary according to the expertise within each company.

4. Internationalisation opportunities in non-EU third countries

4.1 Opportunities in non-EU third countries

The European Mobility, Transport, and Automotive ecosystem offers numerous opportunities for SMEs, start-ups and VSBs to expand their businesses beyond the European Union borders. The internationalisation can be facilitated by a variety of activities, including collaboration agreements, direct sales, joint ventures, and licensing. Several non-EU countries¹⁰ such as Mexico, the United States, Canada, the United Arab Emirates, Saudi Arabia, China, Japan, South Korea, and Morocco offer great potential for internationalisation. Understanding the opportunities¹¹ and challenges¹² in each of these countries is fundamental for companies to develop successful strategies for international expansion.

In this section, we will explore the internationalisation opportunities for European MTA SMEs, start-ups and VSBs in these third countries and consider the potential contribution of different activities to their business plans. Please note that this is a non-exhaustive list of countries and that some of the countries mentioned in the RESIST project surveys are particularly highlighted.

1. Mexico

Mexico is an emerging market¹³ with a growing automotive sector, providing opportunities for European SMEs, start-ups and VSBs to export automotive components and technologies. Collaboration agreements, domestic-based sales representatives, and exporting by direct sales are viable options for market entry. It is important to note that the U.S.-Mexico-Canada Agreement (USMCA), which replaced the North American Free Trade Agreement (NAFTA), has implications for European MTA companies. One of the main changes is that the USMCA imposes higher regional content requirements for automobile manufacturing, which means that European MTA SMEs may face increased competition in the North American market. Additionally, the agreement includes provisions related to intellectual property, labour standards, and environmental protection, which may affect the way European SMEs, start-ups and VSBs do business with companies in the region.

Therefore, it is essential for European businesses to understand the potential consequences of the USMCA and adapt their strategies accordingly to remain competitive in the North American market. A clear example is the strategy highlighted by one SME interviewed by RESIST with the intention of opening new factories in Mexico to be able to sell in North America without restrictions.

¹⁰ European Commission (2023). *Mobility and Transport. Bilateral cooperation.*
https://transport.ec.europa.eu/transport-themes/international-relations/bilateral-cooperation_en

¹¹ INTonomous (2023). A new European project ready for the United States, Canada and the United Arab Emirates.
<https://www.intonomous.eu/>

¹² Deloitte (2020). *2020 Global Automotive Consumer Study Is consumer interest in advanced automotive technologies on the move? Asia Pacific.*
<https://www2.deloitte.com/content/dam/Deloitte/global/Documents/Consumer-Business/gx-global-automotive-consumer-study-2020-asia-pacific.pdf>

¹³ Deloitte (2022). *Mexico economic outlook, December 2022.*
<https://www2.deloitte.com/us/en/insights/economy/americas/mexico-economic-outlook.html>

2. United States of America

The United States are a mature market with a highly competitive automotive industry, but it still offers opportunities for European SMEs, start-ups and VSBs to supply niche components and technologies. The USA market is one of the largest in the world with a high purchasing power of USA customer, providing ample opportunities for companies to expand their customer base and increase sales. Likewise, it is highly developed and technologically advanced, providing chances for collaboration, innovation, and learning. Trade barriers can be a disadvantage, as the USA impose tariffs and other trade barriers on certain products, which can make it difficult for SMEs, start-ups and VSBs to compete in the market. Not to be forgotten is the cost of entry, as arriving in the USA market can be expensive, requiring significant investment in marketing, logistics and legal support.

As a result, collaboration agreements, domestic-based sales representatives, exporting by direct sales, and joint ventures are potential options for market entry.

3. Canada

Canada is a small but developed market with a significant automotive industry, offering opportunities for European SMEs, start-ups and VSBs to export a wide range of components and technologies. In the area of electric and hybrid vehicles, the Canadian government's focus is on reducing carbon emissions and promoting clean energy, so there is a growing demand for electric and hybrid vehicles. European MTA companies can export components such as batteries, electric motors, and power electronics to support this trend. Regarding automotive parts, Canada has a strong automotive manufacturing industry, and there is demand for high-quality components such as engines, transmissions, and suspension systems that can be provide by European companies. Another interesting field is intelligent transportation systems, where European industry can supply components and software related to these technologies.

Finally, Canada has an extensive rail network, which can be interesting for SMEs, start-ups and VSBs with expertise in rail equipment. There is demand for rail equipment such as locomotives, wagons, and signalling systems.

4. The United Arab Emirates (UAE)

The United Arab Emirates are a country located in the Middle East that have emerged as a hub for business and trade, particularly in the Gulf region. With a strong and diverse economy, the UAE offer significant opportunities for international trade, particularly for European MTA SMEs, start-ups and VSBs. The UAE are strategically located at the crossroads of major global trade routes, making them an ideal hub for businesses looking to access markets in the Middle East, Africa, and Asia. Also, UAE's economy is diversified, with strong sectors in oil and gas, finance, tourism, and transportation.

The RESIST's in-depth interviews regarding the advantages of this country highlight the high level of purchasing power. the low risk of non-payment, a favourable environment with low taxes, minimal bureaucracy, and a simplified incorporation process.

5. Saudi Arabia

It is the largest economy in the Middle East and has been implementing policies to reduce its dependence on oil and diversify its economy. As part of these efforts, the government has

been investing heavily in infrastructure, including transportation, creating potential opportunities for MTA SMEs, start-ups and VSBs. Saudi Arabia has a growing automotive sector with a high demand for commercial vehicles and a notable level of disposable income, which makes it an attractive market for European companies offering high-end products and services. However, as in other countries of the Middle East, doing business in Saudi Arabia requires an understanding of the country's business culture, which differs that of European countries in many aspects.

6. China

China is the world's most populous country with over 1.4 billion people and largest automotive market¹⁴. China's rapid economic growth has created a large middle class with an increasing demand for transportation and mobility solutions - an opportunity for MTA companies. In recent years, China's technology sector has seen significant developments in the areas of autonomous driving and electric vehicles. China has become the world's largest market for electric vehicles, accounting for nearly half of all electric vehicles sold globally in 2020. This is due in part to the Chinese government's policy of promoting new energy vehicles, which has resulted in generous subsidies and tax incentives for consumers and manufacturers. The national target set is for autonomous vehicles to account for 30% of all new cars sold in China by 2025. To achieve this, Chinese tech giants such as Baidu and Tencent have invested heavily in autonomous driving research and development, with pilot programmes in many cities. Thus, an important market is opening for European SMEs, start-ups and VSBs specialising in electric vehicles to access the largest Asian economy.

Nevertheless, entering the Chinese market can pose challenges, including cultural and language differences, regulatory hurdles, and competition from domestic companies.

7. United Kingdom

The UK's long-standing expertise in automotive manufacturing, engineering, and design has contributed to the development of the industry. The UK is the second-largest producer of premium cars in the world and has a highly skilled workforce that contributes to the development of innovative and sustainable transport solutions. It has a strong connection with Europe, with the majority of its imports and exports being from and to EU member states. The post-Brexit UK-EU trade deal was agreed upon in December 2020 and has provided some stability to trade between the UK and the EU.

Regarding advantages, the UK market offers a highly skilled workforce, a large and well-established market, and a business-friendly environment. It thereby offers potential opportunities for collaboration and partnership. However, Brexit uncertainties remain one of the biggest challenges and potential barriers to entry.

8. Morocco

The Moroccan MTA market is currently undergoing significant development and modernisation, making it an attractive destination for European SMEs, start-ups and VSBs looking to expand their international presence. The country's geographic location at the crossroads of

¹⁴ Auto Shanghai – Shanghai International Automobile Industry Exhibition (2023). *The Development of China's Automotive Market*.
<https://autoshanghai.auto-fairs.com/en/trade-fair/information/market-information/>

Europe, Africa, and the Middle East, as well as its stable political climate, make it an ideal gateway to the African continent. Regarding the attraction of foreign investment, the country has also been implementing policies to facilitate the establishment of businesses, including tax incentives, and simplified administrative procedures. The Moroccan market is dominated by the automotive sector, which accounts for a significant portion of the country's exports. The country has attracted major global automakers, including Renault, Peugeot, and Citroen, which have established manufacturing plants in the country. Additionally, there is important demand for buses, trucks, and other commercial vehicles.

In terms of its relations with Europe, Morocco has strong economic and political ties with the EU, including a free trade agreement that has been in place since 2000. The EU is Morocco's largest trading partners. However, there are also some challenges and disadvantages to consider, such as a relatively small domestic market size, competition from established global players, and cultural and language barriers. Additionally, the country's infrastructure and regulatory environment may still require improvements to meet European standards.

9. Japan

Japan is a mature, large, and well-established MTA market with a highly competitive automotive industry. The country is home to major automakers such as Toyota, Nissan, and Honda, and has a strong supply chain network in the automotive sector. The Japanese MTA ecosystem is developing advanced technology and innovation in areas such as electric vehicles, self-driving cars, and hydrogen fuel cells.

Japan has a strong trade relationship with the EU, and the two sides signed a free trade agreement in 2018. This agreement eliminated tariffs on most goods traded between Japan and the EU, including automobiles and parts. EU exports to Japan reached their highest level in 2021 (€62.4 billion). This has made it easier for European SMEs, start-ups and VSBs that offer advanced technology and high-quality products to export them to Japan.

Nevertheless, as in the other countries mentioned above, there are also challenges for European companies looking to enter the Japanese market, including navigating cultural differences, language barriers, and a complex business environment.

10. South Korea

The automotive industry is a key sector in South Korea, accounting for a significant portion of the country's economy (12% of the country's GDP and 13% of its total exports). The top automobile manufacturers in South Korea include Hyundai and Kia, which are globally recognized brands.

In terms of trade, South Korea is an important partner for the European Union. The EU and South Korea have a free trade agreement (FTA) that entered into force in 2011. Before the COVID-19 pandemic, in 2019, the total trade in goods between the EU and South Korea was €98.7 billion, with €53.6 billion in EU exports and €45.1 billion in imports. There are ample opportunities for European SMEs, start-ups and VSBs to collaborate or expand their operations, as the South Korean market counts with a highly developed infrastructure and skilled workforce.



As in the other countries analysed, though, it will also be important to approach the market strategically and with a solid understanding of the local business environment, to deal with language barriers, cultural differences, and regulatory complexities.

5. Activities to support the internationalisation of European SMEs, start-ups and VSBs in the MTA ecosystem

5.1 Activities to contribute to internationalisation strategies

Among the various internationalisation opportunities¹⁵ for SMEs, start-ups and VSBs in the European mobility, transport and automotive ecosystem that can be found in non-EU countries, this paper highlights the following activities:

- 1. Attend matchmaking events to find customers and partners.** Attending matchmaking events to find customers and partners in non-EU countries can provide SMEs, start-ups and VSBs in the European MTA ecosystem with access to new markets, networking opportunities, exposure to new technologies, and access to business support services. These benefits can help companies expand their businesses and improve their competitiveness in the global marketplace. These events provide an opportunity to connect with potential customers and partners from different regions and countries, expand customer bases and diversify revenue streams.

Matchmaking events also provide SMEs, start-ups and VSBs with an opportunity to network with industry professionals from third countries, allowing them to establish new business relationships and explore potential collaborations. Such collaborations can lead to joint ventures, research and development partnerships, and other business opportunities that can help companies expand their businesses. This is a practice that has been developed and is proving to be effective. For example, the European Clusters Collaboration Platform organises numerous international matchmaking events¹⁶, including in Morocco and Taiwan in 2023. As another example, the Enterprise Europe Network¹⁷ (EEN) provides support to SMEs to attend matchmaking events in countries outside the EU.

- 2. Support to attend conferences and fairs.** Conferences and fairs are a valuable way for SMEs, start-ups and VSBs to establish contacts and showcase their products and services in non-EU countries. SMEs can attend these international events to explore new markets and establish partnerships with companies from non-EU countries.

In addition, the interviewed SMEs highlighted that they got to know new technologies and innovations. The specialised trade fairs often offer presentations and discussions on the latest industry trends, technologies, and innovations. By attending these events, companies can keep abreast of the latest developments in their sector, enhancing their competitiveness and improving their product offerings.

Many organisations and programmes, such as the International Trade Centre (ITC) and the Export-Import Bank of the United States, offer financial assistance to SMEs, start-ups and VSBs for attending international conferences and fairs.

¹⁵ ECCP (2023). *European Cluster Partnership for Going International*.
<https://clustercollaboration.eu/eu-cluster-partnerships/escp-4i>

¹⁶ ECCP (2023). *Matchmaking events*.
<https://clustercollaboration.eu/event-calendar/matchmaking>

¹⁷ Enterprise Europe Network (2023). *Events*.
https://een.ec.europa.eu/events?f%5B0%5D=field_eventstartdate%3Anext_year

3. **Support to travel to potential partners or clients.** SMEs, start-ups and VSBs can benefit greatly from the support to travel to potential partners or clients in non-EU countries. This can help them establish direct relationships with potential customers or partners, assess market demand, identify challenges and opportunities, and establish a presence in a new market. Direct travel to these countries allows companies to gain an in-depth understanding of market demand, customer preferences, and local regulatory frameworks. This can enable businesses to tailor their products and services to the needs of the market, mitigate risks, and capitalise on opportunities. Also, it can lead to better business opportunities, including partnerships, joint ventures, and new sales channels. However, most of the interviewed SMEs point out that these trips need a proper preparation to not waste time and economic resources. Therefore, EU companies should study the market and potential partners adequately to see whether the journey is necessary and whether it will facilitate future economic relations.

4. **Support for trainings on internationalisation steps.** Training programs can provide guidance on the legal and regulatory frameworks of non-EU countries, cultural differences and communication styles, strategies for market entry and growth, and other important aspects of international business operations. This can help SMEs, start-ups and VSBs navigate the complexities of doing business in third countries, mitigate risks and improve their competitiveness. Furthermore, its can more easily identify and understand the unique characteristics, market size, customer preferences, and local regulations of the country they wish to enter. This can make it easier for companies to develop tailored market entry strategies¹⁸ that can enable them to stand out from competitors and succeed in the target market. Some examples of training programs could be:
 - a. Cultural Awareness and Communication: These types of training can improve the understanding of the business environment, cultural nuances, and regulations of a specific country. Intercultural communication develops the skills necessary to communicate effectively (language, verbal and non-verbal communication, social norms, and etiquette) with individuals from different cultural backgrounds to avoid misunderstandings and build strong relationships with potential partners and clients.
 - b. Export and International Trade: These trainings focus on the requirements and challenges of exporting their products or services to international markets and could deal with the legal and regulatory requirements of exporting from the country (legal system), as well as documentation and customs procedures. In addition, SMEs, start-ups and VSBs can learn about the financial aspects such as payment methods, currency exchange, and credit risk.
 - c. Market Research and Competitor Analysis: This analysis can help SMEs, start-ups and VSBs develop the necessary skills to conduct in-depth research to determine market size (collecting and analysing data to identify market segments) and customer behaviour (needs and preferences) to develop effective targeted market entry strategies. The training can help identify key competitors, analyse their

¹⁸ INTonomous (2023). *Marketing kits*.
<https://www.intonomous.eu/whats-new/marketing-kits>

strengths and weaknesses, and develop strategies to differentiate the EU SME's product or service from its competitors.

- d. **Risk Management:** Trainings in these areas can help identify and moderate potential financial, legal, or reputational.

The specific training needs of each SME will depend on their situation. Therefore, it is up to the SMEs to identify in which area they have the most difficulties. It may be recommended to seek the assistance of a qualified international trade advisor to determine the most appropriate training programs.

5.2 International fairs outside the EU

There are numerous international trade fairs¹⁹ outside the EU that are relevant for the Mobility, Transport, and Automotive ecosystem. The following fairs are examples²⁰:

- **Auto Shanghai (China):** This is one of the largest automotive trade shows in the world, featuring a wide range of products and services from leading manufacturers and suppliers. It attracts visitors from around the world and is a great opportunity for SMEs, start-ups and VSBs to showcase their products and services to a global audience. Also, the Chinese car market is the largest passenger car market in the world since 2009.
- **Tokyo Motor Show (Japan):** This biennial event is one of the largest and most influential automotive trade shows in Asia. It attracts visitors from all over the world from the automotive industry (passenger cars, commercial vehicles, motorcycles, vehicle bodies, parts, and machinery) and provides an opportunity for European SMEs, start-ups and VSBs to connect with potential customers and partners in the Japanese market. By 2023, they expect to reach one million visitors to Tokyo Waterfront City.
- **Dubai International Motor Show (UAE):** It is the major and most established automotive show in the Middle East, showcasing the latest products and services from leading manufacturers and suppliers. It is a biennial auto show held in the Emirate of Dubai and provides an opportunity for SMEs, start-ups and VSBs to showcase their products and services to a growing market in the Middle East, especially for those involved in the supply of high-end car products.
- **São Paulo International Motor Show (Brazil):** This event is the biggest automotive trade show in Latin America. It has been held in São Paulo, Brazil, since 1960, and this biannual fair attracts visitors from across the region and provides an opportunity for SMEs, start-ups and VSBs to connect with potential customers and partners in this fast-growing market.
- **Busworld (India, Turkey, Kazakhstan):** It is a leading international trade fair for the bus and coach industry, with events held in various countries outside the EU, including

¹⁹ 10 Times (2023). *Top 100 Auto & Automotive Events*.

<https://10times.com/top100/automotive>

²⁰ Busworld (2023). *B2B events for the bus and coach industry*.

<https://busworld.org/>



India, Turkey, and Kazakhstan. It provides a B2B opportunity for SMEs to showcase their products and services to a targeted audience of industry professionals. The figures range from 125 countries represented with more than 70,000 visitors.

Attending these events can provide valuable insights into the latest trends and technologies in the Mobility, Transport, and Automotive ecosystem, while exhibiting can help European SMEs, start-ups and VSBs showcase their products and services to likely clients and partners in third countries.

6. Conclusions and next steps

There are many internationalisation opportunities for European SMEs, start-ups and VSBs in the Mobility, Transport and Automotive ecosystem, especially in third countries such as Mexico, United States, Canada, United Arab Emirates, Saudi Arabia, China, Japan, South Korea, Morocco, etc. These countries have growing economies and offer many advantages for companies, such as access to new markets, new clients and partners, technologies and innovation, and new sources of revenue.

Nevertheless, the interviews carried out by RESIST project reveal that European MTA SMEs, start-ups and VSBs have more difficulties in internationalising to third countries due to the different barriers studied (e.g. cultural differences, legal and regulatory barriers, competition, logistics and infrastructure, lack of resources and financial barriers, political instability, etc.) and they are still undergoing internationalisation processes within the EU-27.

To facilitate this process, the European RESIST project will provide financial support to European companies seeking to expand internationally in these third countries. Funding will be available to attend matchmaking events, conferences, and fairs to find clients and partners, traveling to potential clients and partners, and training courses on internationalisation topics such as cultural awareness and communication, export and international trade, market research and competition analysis, and risk management.

It is important to note that the needs of each company are unique, so it may be a good option to seek the help of a qualified international trade advisor to determine the international strategy. The RESIST project can help achieve this leveraging with its Financial Support for Third Parties (FSTP). Thus, with the right support and resources, European MTA SMEs, start-ups and VSBs can take advantage of internationalisation opportunities and grow their business on a global scale.

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- **RESIST Eurocluster surveys:** Internationalisation opportunities for SMEs in the Mobility, Transport and Automotive ecosystem survey
- RESIST one-stop-shop. Internationalisation section

Annexes

- Annex 1: Internationalisation opportunities for SMEs in the Mobility, Transport and Automotive ecosystem survey
- Annex 2: RESIST one-stop-shop. Internationalisation section

Annex 1: Internationalisation opportunities for SMEs in the Mobility, Transport and Automotive ecosystem survey



EU Survey

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Save a backup on your local computer (disable if you are using a public/shared computer)

RESIST Eurocluster - Internationalisation opportunities for SMEs in the Automotive-Transport-Mobility ecosystem

Pages: **Start** Company activity Internationalisation level Future Contact details



Internationalisation opportunities for SMEs in the Automotive-Transport-Mobility ecosystem

Thank you for taking this 10-minute survey.

The survey is conducted within the project "REsilience through Sustainable processes and production for the European automotive Industry" (RESIST), co-funded by the European Union within the framework of the "Joint Cluster Initiatives (EUROCLUSTERS) for Europe's recovery". Your answers help the project with the design of the internationalisation support for SMEs in the Automotive-Transport-Mobility ecosystem, including financial support, within the RESIST project.

Therefore, it is crucial for the RESIST team to understand your situation and opportunity assessment, especially for the future development after these years of global pandemic, inflation, the Ukrainian war, and the supply chain crisis.

The survey is open for all interested automotive and manufacturing SMEs, independently of the position in the value chain. **Deadline to fill in the survey is 1st February 2023.**

This study is conducted by the five partners of the RESIST project: Cluster Pôle Véhicule du Futur - PVF (FR); CEAGA - Galician Automotive Cluster (ES); AUTOKLASTR (CZ); Cluster IDIA - Asociación Investigación, Desarrollo e Innovación En Aragón (ES); and Business Upper Austria - OÖ Wirtschaftsentwicklungsagentur GmbH - The Upper Austrian Economic development agency (TMG/BIZ-UP) (AT). RESIST supports the green and digital transition of SMEs as well as their increased resilience to crises. Steered by a One-Stop-Shop, SMEs from the automotive-transport-mobility and manufacturing ecosystems are supported with personalised and targeted services to succeed in their green and digital transition.

Next

Pages: Start **Company activity** Internationalisation level Future Contact details

A. Company activity

* What is your position segment in the Automotive-Transport-Mobility ecosystem?

- Light vehicles cars, motorcycles, SUVs, passenger, minivans, etc.
- Trucks and buses (coaches, trailers, and heavy buses)
- Heavy vehicles (e.g., for construction and agriculture, etc.)
- Electric cars and plug-in hybrids (electric motors, rechargeable batteries, etc.)
- Autonomous vehicles
- Other

If "Other", please specify:

* What is your position in the value chain of the Automotive-Transport-Mobility ecosystem?

- Inbound logistics
- Design and Manufacture
- Engineering
- Quality and Warranty
- Connected vehicles services
- Service
- Other

If "Other", please specify:

Previous **Next**

Pages

Start

Company activity

Internationalisation level

Future

Contact details

Current level of internationalisation

* Do you already have international activity (for example, customers, subsidiaries, or partners abroad)?

- Yes
 No

Where do you already have an international activity? Please choose if applicable

	EU27	Other European countries	Africa	Middle East – Central Asia	China	Other Asian countries	North America	South America
* Customers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Distributors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Investors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Outsourcing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* R&D partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Sales offices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Subsidiaries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please, list up to 3 important countries in which you have business activity outside of Europe:

Country 1

Country 2

Country 3

* What are the challenges to increase your international activities?

- Access to potential partners
 Access to potential clients
 Tariff barriers
 Lack of IPR protection
 Product standards
 Existing laws and regulations
 Lack of capital or finance
 Lack of support and/or advice
 Cultural and language differences
 Lack of information
 Other

If "Other", please specify:

Previous

Next

Plans

* Do you wish to further develop your international activities within the next 3 years?

- Yes
 No

* What are your main objectives for internationalisation?

- Access to skilled human resources
 Acquire new customers (on existing products/solutions)
 Benefit of more flexible regulation
 Develop new R&D partnerships
 Increase private funding / access to capital
 Increase production capacity
 Open-up new markets (new products and service portfolio)
 Outsource manufacturing activities at lower costs
 Other

If "Other", please specify:

* In which part of your industry's value chain would you be interested in internationalising?

- Inbound logistics
 Design and Manufacture
 Engineering
 Quality and Warranty
 Connected vehicles services
 Marketing and sales
 Service
 Other

If "Other", please specify:

Please, list up to 3 countries in which you would like to (further) develop your activities outside of Europe:

Country 1

Country 2

Country 3

* Why are you interested in those countries?

- Familiar environment
 Fits to strategy/vision
 Language / cultural proximity
 Market size
 Proposal from customer
 Proximity
 Other

If "Other", please specify:

* How would you like to further develop your activities?

- Collaboration agreements
 Co-production agreement
 Domestic-based sales representative
 Exporting by direct sales
 Foreign branch/subsidiaries
 Franchise
 Greenfield investment
 Joint ventures
 Licensing
 Other

If "Other", please specify:

* Which services would help your internationalisation activities?

- Support to attend matchmaking events to find customers and partners
 Support to attend conferences and fairs
 Support to travel to potential partners or clients
 Support to trainings on internationalisation steps
 Support to trainings on specific countries and intercultural communication
 Support to conduct market studies
 Support to conduct competitor analysis
 Other

If "Other", please specify:

Which international fairs will you or would you like to attend as visitor or exhibitor in the near future?

Pages

Start

Company activity

Internationalisation level

Future

Contact details

About your company

* Name of the company:

* Location of the company (country):

* Location of the company (region):

Note: The next questions are related to the size and global dimension of your company. If your company belongs to a larger group, please report answers for your company/establishment only, not for the whole group, unless explicitly specified.

* Is your company considered a Small and Medium Enterprise (SME) in your country?

- Yes
 No

* Please, indicate the number of employees in your company.

- Less than 10
 10 – 49
 50 – 249
 More than 249

Are you a member of a cluster?

- Yes
 No

If "yes", please indicate which one:

GDPR consent

All responses to this survey will be kept strictly confidential and will be stored until the end of the project. The survey data are reported only in aggregate form or in a manner that does not allow individual responses to be identified. The data from this survey is collected and managed by Cluster IDiA and will be shared only between the project partners.

* I have read and accepted the terms and conditions of the [data Privacy Policy](#).

For any question about the survey or the project RESIST, please contact: alvaro.lombardo@idia.es

Previous

Submit



Annex 2: RESIST one-stop-shop. Internationalisation section

RESIST one-stop-shop

WELCOME TO THE RESIST "ONE-STOP-SHOP" SERVICE

The RESIST initiative aims to help SMEs from the Mobility, Transport and Automotive industrial ecosystem to advance in their twin transition (digital and green) as well as to increase their resilience to crises.

The one-stop-shop service is the first step to get involved in this project. Through this form, we will be able to know better your needs, allowing us to guide you towards the most suitable project activities and services.



CONTACT DETAILS

* Company name

* Main business activity

* Select the sector you belong to

* Country

Region

* Contact person

* Position

* Email

Phone number

SUPPORT IN THE FRAMEWORK OF THE RESIST INITIATIVE

* Which of the following technologies/topics are of stronger interest for your company?
at most 5 choice(s)

- Applied artificial intelligence
- Machine learning
- Cloud and edge computing
- Immersive reality and digital twin
- Advanced connectivity
- Internet of things and industrial internet of things
- Cybersecurity
- 3D printing
- Robotics
- Connected and autonomous mobility
- Electric and zero-emission vehicles (including hydrogen)
- Decarbonisation and circular economy
- Energy
- Other

* In which of the following areas you would like to receive our support? (Multiple choices allowed)

- Networking activities in the EU to make more resilient value chains
- Innovation projects to mitigate the impact of the crisis and future market evolution
- Adaptation of technologies and processes to foster sustainability and digitalisation
- Training programmes for the upskilling and reskilling of workforce
- Internationalisation outside the EU (trade, investment and partnering opportunities)

INTERNATIONALIZATION OUTSIDE THE EU

* What are your main objectives for internationalisation? (multiple choices allowed)

- Access to skilled human resources
- Acquire new customers (on existing products/solutions)
- Benefit of more flexible regulation
- Develop new R&D partnerships
- Increase private funding / access to capital
- Increase production capacity
- Open-up new markets (new products and service portfolio)
- Outsource manufacturing activities at lower costs
- Other

* What do you need to reach those objectives? (multiple choices allowed)

- Attend matchmaking events to find customers and partners
- Attend conferences and fairs
- Meet potential partners or clients
- Training on internationalisation steps
- Training on specific countries and intercultural communication
- Market studies
- Competitor analysis
- Other

Do you wish to increase your international activities in countries outside the EU within the next 3 years? Tell us your target regions and countries (minimum 1 region is compulsory)

Regions	Priority countries (max 3)
European countries outside EU	//
Africa and Middle East	//
Asia	//
North America	//
South America	//

* Why are you interested in those countries?

- Familiar environment
- Fits to strategy/vision
- Language/cultural proximity
- Market size
- Proposal from customer
- Proximity
- Other

* What instruments could be useful for you to develop these internationalization activities?

- Collaboration agreements
- Co-production agreement
- Domestic-based sales representative
- Exporting by direct sales
- Foreign branch/subsidiaries
- Franchise
- Greenfield investment
- Joint ventures
- Licensing
- Other

Which events in the EU will you or would you like to attend in the near future outside EU?

	Name of the event	Date	Location	Link of reference
1	//	//	//	//
2	//	//	//	//
3	//	//	//	//



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