



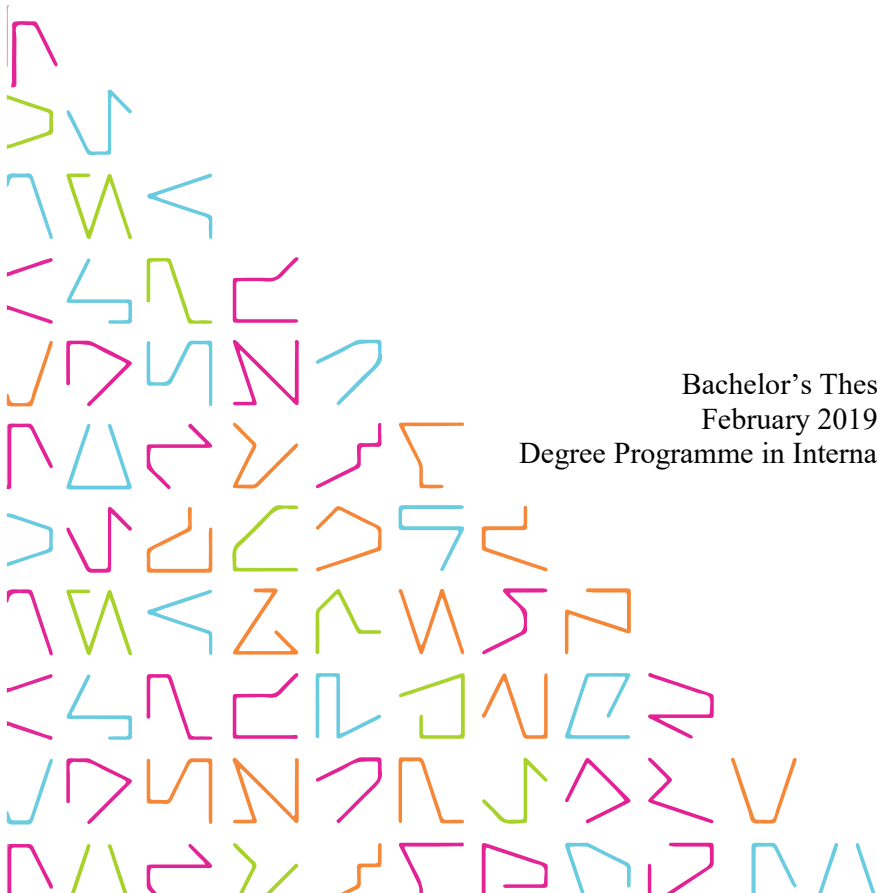
TAMPEREEN  
AMMATTIKORKEAKOULU

# UTILIZATION OF FREE TRADE AGREEMENTS WITHIN THE TAMPERE REGION

Study and Future Opportunities

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Bachelor's Thesis  
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## ABSTRACT

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Utilization of Free Trade Agreements within the Tampere Region: Study and Future Opportunities  
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The purpose of this thesis was to research the utilization rates of the European Union's free-trade agreements, specifically within companies operating in the Tampere region. This work also aimed to measure the companies' understanding of the agreements, their contents and their benefits, as well as the minimum requirements of utilizing them.

Methods used in this thesis included mapping and analyzing current information sources on free trade agreements as a crucial part of the utilization process. In addition, a survey was deployed for exporting companies in the region to collect data on how they understand, utilize and reap the benefits from EU's free-trade agreements. The survey also asked companies to rate the availability, clarity and visibility of information sources on free trade agreements. Further observations were made based on suggestions and wishes collected from these companies.

The findings indicate that while some companies in the region utilize free trade agreements well, the majority are still feeling uncertainty and yearning for better information flow and delivery. The companies would like to receive better education, regular updates and new tools to help them master the benefits of free trade. With these conclusions from the research, new opportunities were highlighted for Tampere Chamber of Commerce as a provider of information and a potential future educator on the subject.

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Keywords: free-trade, free-trade agreements, pirkanmaa, tampere chamber of commerce, european union

**TABLE OF CONTENTS**

1	INTRODUCTION.....	4
1.1	Thesis background .....	5
1.2	Goals of the thesis.....	6
1.3	Limitations of the thesis .....	6
1.4	Structure of the thesis.....	7
2	FREE-TRADE AGREEMENTS .....	9
2.1	What are free-trade agreements? .....	9
2.2	Three types of trade agreements .....	9
2.3	Benefits of free-trade agreements.....	11
2.4	Current information sources on free-trade agreements.....	13
3	RESEARCH METHODS .....	17
3.1	Research approach .....	17
3.2	Structure of the survey .....	18
4	Responses .....	24
4.1	Analysis of the responses .....	36
5	CONCLUSIONS.....	38
6	SUMMARY .....	39
	REFERENCES .....	40

## 1 INTRODUCTION

The topic for this thesis stemmed from my time as an export documents intern and a summer worker at Tampere Chamber of Commerce. The most prominent aspect of my duties was working as a member of the team that checked and ratified companies' export documentation, mainly certificates of origin and ATA-carnet customs documents. Because of this, every member of the team needed to have up-to-date information on changes to world trade, both in practice and protocol. This standard is regulated and maintained by the Central Chamber of Commerce. In May, they hosted a seminar that is held twice per year, inviting all the officially approved export documentation personnel from every chamber of commerce in Finland to discuss the current climate and trends of world trade. This included the state of international trade of Finland and Finnish companies, especially the topic of free-trade and how well our companies are playing with it. As a part of the round-table discussions held there, representatives from the ministry presented a briefing on new developments on the European Union's free-trade agreements and existing opportunities in free-trade. Opportunities that the chambers of commerce could advocate for their member companies. In specific focus were the EU's upcoming agreements with Japan, Singapore and Vietnam; all of which are countries Finland exports from and imports to. These new free-trade agreements will go into effect between years 2019 and 2020. However, concerns were expressed that certain segments of industry are not taking full advantage of existing free-trade agreements as much as hoped and thus at the risk of losing or missing out on a competitive edge in these markets. The ministry was at that moment unsure as to why companies do not either capitalize or show interest on the agreements. As representatives of export documentation from all the official chambers of commerce within Finland, the ministry's message to us was that this would be both an interesting and an important metric to look in to.

At the time, I was still looking into a subject for my bachelor's thesis and this aligned a perfect opportunity for myself and Tampere Chamber of Commerce. The topic was briefly presented and suggested in a meeting and was later approved as a thesis commission on the grounds that it tackles a relevant issue with little existing data, also coinciding with the organization's sphere of influence. While recognizing the scope of this topic, I saw it as a challenge but more importantly, as a meaningful and a contributive study for

Tampere Chamber of Commerce and the field of international trade in Finland, as well as something I could possibly build a personal, future expertise upon.

## 1.1 Thesis background

According to Mrs. Heli Siikaluoma, the commercial counsellor to the Market Access Unit within the ministry's Department of External Economic Relations, the numbers and figures gathered from the past few years of external trade indicate that Finnish companies are taking advantage of approximately 75% of preferential tariff treatments. This consists of tariff treatments covered under the GSP Generalized System of Preferences made possible by the European Union's free-trade agreements. This places Finland within the EU-average. However, the utilization rate varies greatly depending on the agreement and sector of industry. For example, if we look at the free-trade agreement between EU and South Korea, focusing on the machine and device industry, the rate has been relevantly low in Finland's part. (Hatanpää 2018).

As a starting point, it was important to recognize that no up-to-date data or measurements were available for the region of Pirkanmaa regarding the utilization rates of free-trade agreements. This meant that a study on how companies in the area utilize and understand the European Union's free-trade agreements could gather beneficial information for Tampere Chamber of Commerce as an enabler of international trade. Depending on the results, this could help in generating added value towards companies, but more importantly, increase companies' awareness about free-trade agreements and consequently boost utilization rates. The hope was that the thesis study would also provide new metrics and information from companies themselves on free-trade agreements not measured elsewhere. In addition, neither Eurostat or Statistics Finland (Tilastokeskus) had any additional data (that is at least publicly available) that could be disseminated. This further backed a need for a survey to measure how many companies are reaping the benefits, identify any potential barriers and analyze key points companies go through during the process.

## 1.2 Goals of the thesis

From the very beginning and initial pruning of the scope for this thesis, three clear goals were set;

- To identify problem sources as to why companies are not taking a full advantage of free-trade agreements, as this was presented as an unknown.
- To further determine specific areas of industry where the problem may be more prevalent, instead of broadly looking at all companies as a single viewpoint.
- Provide either a practical solution or a concept of a practical solution to the problem; or at least further define the cause for the problem and find a target for future research.

Realistically, the aim is highlight underlying issues that might cause certain eligible companies to forego usage of free-trade benefits, such as lack of information or information channels in general available on the subject. To reach and find these critical points, a survey will be deployed in co-operation with Tampere Chamber of Commerce to their member companies and as such, the region of Pirkanmaa will be represent the main sample for the study. Differences in company operating procedures, business models and import/export quantities likely cannot guarantee a single action plan or a recommendation that would be both applicable and solve the issue completely for all companies. Overall, the main goal for the study is to provide new data for organizations such as Tampere Chamber of Commerce who advocate international trade, rather than create direct solutions for the eligible companies themselves.

## 1.3 Limitations of the thesis

Without data to accurately point out whether companies in certain regions in Finland make better use of the benefits available to them by free-trade agreements, the initial assumption is that there is no existing regional advantage until proven otherwise. In an ideal situation, the study would be executed on a national level to determine whether this is true, and if so, identify regions where a problem persists then look towards reasons why. However, given the available time and resources as well as maintaining a realistic scope that can produce actionable results, the core part of the thesis will focus on companies in the area of Pirkanmaa. Specifically, companies which have membership-status within Tampere Chamber of Commerce, the commissioner of this study.

Another limitation lies in what can be produced as results. It is not feasible to tackle the problem from the company-level and create solutions that fit companies individually. Companies operate differently and could be on different stages of the issue. For example, where one company is looking into specifics on how to take advantage of preferential tariff treatments, another company might not even be aware that the country they export to has a free-trade agreement with the European Union.

Collecting information from local companies also needed to be narrowed down to what would yield the highest number of answers with the best efficiency. Given the amount of time and effort it would take to first find and then reach the right people within each individual company, a proposition was made to use some of the resources Tampere Chamber of Commerce has available. An agreement was made, which permitted the use of their current survey platform Questback to reach their member companies directly. Greater scale and reach would require a pre-existing solution or an incentive as an offer to guarantee company participation, as well as a national-level platform or usage of multiple platforms from different parties. No such resources were available for consideration when conducting this study.

#### **1.4 Structure of the thesis**

This thesis aims to follow a structure where sections are presented in a cohesive, logical order with a flow that makes it easy to follow. The thesis will begin by explaining the background for the topic, its goals, limitations and the general structure of the study. These precede a deeper dive into what free-trade agreements are in detail, what kind of different treaties there are and what they have to provide for businesses that export their products. The purpose is to create an understanding of free-trade agreements for the reader, as well as display a broader understanding about the field of this thesis topic to provide validity that any conclusions or recommendations presented within this paper were made with adequate knowledge of the subject.

As a part of examining the whole utilization process, all instantly available information sources were listed, broken down and analyzed in order to provide a comparison that identifies either key areas of improvement, lack of channels or other targets that a solution

could be built for. Following this are the research methods, namely the survey which was the chosen approach to addressing the defined problem. This is then continued with the presentation of the primary research method – the survey – and its structure with each question and the reasoning behind each question’s inclusion explained in detail. Answers to the survey questions and an analysis into the acquired data are presented in continuation, along with the final summary of the answers as a showcase of the raw results for the study. The final part of the thesis will present the conclusions and outcome of the thesis, along with opportunities for Tampere Chamber of Commerce as the commissioner. A brief summary will sum up the combined substance of the paper and recap the research in a way that anyone glossing over the thesis would understand both its purpose and results clearly.



## 2 FREE-TRADE AGREEMENTS

### 2.1 What are free-trade agreements?

*Free-trade agreements* (FTA) are treaties of cooperation between two or more countries signed with the common goal of boosting bilateral or multilateral trade of goods and services, as well as removing or reducing tariffs, trade barriers and import quotas (O'Sullivan, Sheffrin, 2003, 453). Free-trade is the idea of a trade policy that does not restrict imports or exports; it is the idea of the free market as applied to international trade. Countries that have signed a free-trade agreement form a trade bloc, and the entire region that is covered by the agreement is called a *free-trade area*. According to the theory of economic integration, a free-trade area is considered to be the second of the seven stages in *economic integration* – a unification of economic policies between two states with independent economies. (Balassa 2013, 2). A free-trade area is not to be confused with a *free-trade zone* (FTZ), sometimes referred to as a *foreign-trade zone*, which is a special economic zone defined by the World Bank as a duty-free area that provides distribution facilities for trading, storage, warehousing, transshipment, and re-export operations (Akinci, Crittle 2008, 10). Free-trade zones, such as China's Shenzhen, are not a result of nor bound by international trade agreements. Instead they are domestically maintained areas with economic privileges, such as being duty-exempt, harnessed for making foreign trade and investment more lucrative towards the country (China Briefing, 2017). It is also important to recognize the difference between a free-trade area and a customs union, in which the countries involved use a common external tariff and shared quotas. Customs unions are as such considered the next (third) stage of economic integration from free-trade areas (Balassa 2013, 2).

### 2.2 Three types of trade agreements

To understand the possibilities of what kinds of free-trade agreements may be formed, we need to identify and explain what are considered the three main archetypes of common trade agreements when classified by type and number of signatories: Unilateral, bilateral and multilateral trade agreements (van de Heetkamp, Tusveld 2011, 35).

*Unilateral trade agreements*, also called *unilateral trade preferences* by the World Trade Organization, are agreements where a country adapts trade benefits or trade restrictions without any other country reciprocating, such as a tariff on all imports. The definition also applies to trade incentives, mostly from an importing party, that aim to encourage the exporting party to engage in international trade and as a result boost the exporting party's economy. Unilateral trade agreements are commonly used as a form of foreign aid to help strengthen emerging markets that are too small to be competitors, uplifting their strategic industries and creating new markets for the exporters. (Amadeo 2018a). Granting unilateral trade benefits can also work as tools to exert a country's foreign policy, for instance, a country might be granted one-sided trade benefits in return for adhering to the other party's intellectual property rights, thus preventing cheaper copycat-products from damaging their established brands. The long-term goal could also be raising the standards of living and wages in the target country, creating a less cost-competitive environment to lose domestic jobs to. (Amadeo 2018b). By looking at what defines a unilateral trade agreement, one could also argue that it is a state where a trade agreement simply doesn't exist – and that economic sanctions are also a unilateral trade agreement.

*Bilateral trade agreements* are treaties that exist between two countries, signed in the name of mutual economic benefits. Usually, the goal is to loosen trade restrictions in order to foster more mutual trade and expand business opportunities between the two parties. These are fulfilled in the form of lowered and/or preferential tariffs, changes to quotas and other incentives to trade and invest with the other party. In short, the goal is for both importers and exporters to benefit from the agreement. (van de Heetkamp et al. 2011, 35). The ultimatum in bilateral trade agreements usually revolves around protected or subsidized domestic industries that are centric to the country's economic strength. In most cases, these are the energy, food and automotive industries (Amadeo 2018a). A prominent and the world's largest (bilateral) free-trade agreement would have been the original Transatlantic Trade and Investment Partnership between the European Union and the United States, initiated by former US President Barack Obama in 2013. This iteration has since then entered re-negotiations between the EU and the current US President Donald Trump and is expected to be much smaller in scale.

*Multilateral trade agreements* are in principle the same as bilateral trade agreements, except that they exist between multiple parties (van de Heetkamp et al. 2011, 35). As such, they are much more complex to negotiate as there a greater number of national interests,

requirements and needs to consider; the more countries involved, the higher the difficulty of achieving agreeable terms. However, when successfully put into effect, multilateral agreements are considered very influential as they can cover a larger region. The main benefit gained from the geographical span of a multilateral trade agreement is the increased competitive advantage for the countries as its signatories. It is also custom for the member countries to grant each other a most favored nation status in trade and give each party equal economic opportunities (Amadeo 2018a). The largest multilateral free-trade agreement is the North American Free Trade Agreement (NAFTA), which exists between United States, Canada and Mexico.

Trade agreements with a similar number of signatories and with the same generic principles can still have greatly varying complexity, with some agreements being very simple and lenient in nature whereas others can be quite complex. A trade bloc's unique pacts and policies can also result in differing levels of economic integration as a result of the trade agreement. (Gonzalez 1998, 64).

### **2.3 Benefits of free-trade agreements**

The most centric and advantageous benefit to free-trade agreements are preferential tariff treatments. These can mean either the removal or reduction of tariffs on goods-based trade and sensitive products. On the side of services, free-trade agreements open up new business opportunities and development possibilities, for example, the CETA-agreement unlocks new potential in transport and environment services for signatory countries. (European Commission, 2017). With agreements like CETA, mobility of workforce can become more fluid between countries in an agreement and there are new openings to take part in public contract bids as well. There is also the aspect of legal security, when the business environment cannot abruptly become discriminatory. As a common goal and benefit, free-trade agreements also aim to reduce unnecessary product testing and certification processes. (Koskinen 2017).

As free trade has progressed, the agreements have come to include a wider variety of other trade-related policies. Because border restrictions are becoming less common and more lenient, other benefits and advantages have gained more agency in influencing trade flows and relationships (Preeg 1998, 50). If one were to market the practical benefits of

free-trade agreements to Finnish companies, a mention could be made about the differences in tariffs between countries the European Union has an agreement with, compared countries without one. If a Finnish company exports to such country, the applied tariff will be that of standard WTO-member level. It is often significantly higher. An example can be drawn from EU-members' trade with South Korea, where medical technology, hospital equipment and other medtech products can be exported to without tariffs. Otherwise the tariff level would be 8%. (Hatanpää 2018).

In order to obtain preferential treatment in the target country, the company has to fulfill a certain set of requirements for their exported product. As a first principle, the product in question must originate from the European Union or another country that belongs to an agreement network. Each agreement has their own defined conditions and provisions when it comes to rule of origin, mainly dictating what is considered a sufficient amount of production for a label of origin. For the determination of preferential origin, the EU is considered as a single territory and there are no specific differences between member states. (European Commission, 2018). Apart from general requirements, the products have specific rules per commodity code. The rules on direct transport mean that any products must be exported from the EU to the other party of the agreement directly.

In addition, the Finnish Customs states the following:

“The conditions for a sufficiently produced product (so-called heading-specific list rules) generally apply to industrial products, which can be either a change of heading (at the level of the four-digit heading), the percentage rule (maximum share or minimum value addition of non-originating materials), the condition of the degree of working or processing (e.g. for textile and metal products) or a combination of these conditions. The list rules present the working or processing conditions of the products by heading or heading group. Additionally, the articles of the rules of origin present the conditions for insufficiently worked products as well as for receiving and administering preferential treatment for originating goods. The rules of origin precisely define the standard certificates of origin that, when presented, will entitle the importer to preferential tariff treatment for the export in the country of destination. Applying for or drafting a certificate of origin, requires that the exporter has examined the originating status of the export products in accordance with the conditions mentioned above.” (Finnish Customs, 2018)

## 2.4 Current information sources on free-trade agreements

To study the utilization rate of free-trade agreements among companies, it is necessary to gauge the companies' understanding of the subject from the source; what kind of resources and which entities are there to help businesses. For the purposes of this section we will investigate what resources are readily available online, including any contact information for offline resources, using Google as the search-engine of choice.

The most notable observation when searching for free-trade agreements in Finnish (search term: vapaakauppasopimukset) is the lack of direct results, meaning websites that are clearly stated as information sources on free-trade agreements. The only one with the claim is a website called *vapaakauppa.fi* appearing with the title: 'Information about free-trade agreements' (translated from: "Tietoa vapaakauppasopimuksista"). This site appears as a fourth result in the search, right after the Wikipedia-page on free-trade, a category of articles about the TTIP-agreement from Helsingin Sanomat-newspaper and an article from Helsinki Chamber of Commerce. To understand what type of information is available at different sources, a breakdown of each is required. Both the most relevant search results, as well as export and trade authorities' web resources were considered.

Keywords used: vapaakauppasopimus, vapaakauppasopimukset, vapaakauppa, tullietuus, tullietuudet

### *Central Chamber of Commerce*

No search results from the Central Chamber of Commerce showed up with the search terms listed above at the time of this research. Inputting the search terms into the internal search bar of Central Chamber of Commerce's webpages returns articles in chronological order that contain these words, or words close to them. An interesting observation can be made that there has been a yearly article on the subject of free-trade since 2014, but no additional material that is visible in the searches.

### *Tulli (Finnish Customs)*

While no results show up with bare keywords, adding 'tulli' along with them immediately brings up new results. The top result leads onto the page about the organization's history and free-trade agreements as a part of that, which unfortunately does not provide anything relevant for someone who would be interested in benefiting from the agreements.

However, the second highest search results leads to an info-page about preferential treatment in export, under ‘business customers -> export.’ This is by far the best and most informative piece of information available on preferential tariff treatments and as such, the company-facing benefits of free-trade agreements. This article has also been sourced in this work because it is from the foremost authority on the subject. It concisely explains what preferential treatment in export means, why does it exist and the steps to reaping benefits. There is also a section for additional points of consideration and additional reading that redirects to Ministry for Foreign Affairs of Finland and European Commission resources. The resource has been search-engine optimized, meaning that it shows up on all the listed keywords and slight variations of them as long as ‘tulli’ is added, which should be particularly helpful in guiding those new to the subject. Everything under the page is also available in English and Swedish. Content location: <https://tulli.fi/yrittysasiakkaat/vienti/viennin-etuuskohtelut>

#### *Ministry for Foreign Affairs of Finland*

The ministry’s sources are nowhere to be found on the first pages of searches. Adding their title (‘ulkoministeriö’) to the search terms somewhat improves the results, bringing reports on individual free-trade agreements and free-trade developments. Moving onto internal searches within the ministry’s webpage, the results are similar; publications and reports on trade negotiations. However, from the ‘services and support’ category one can find a page titled ‘EU trade agreements benefit Finnish companies’. This page is an introduction to the very same material that was handed out at the Central Chamber of Commerce’s training day during my internship at Tampere Chamber of Commerce, referenced earlier in this paper. At the bottom of the page are three weblinks, one of which is the aforementioned “Guidelines of the Ministry for Foreign Affairs for companies on how to take advantage of tariff reductions” in a .pdf format. The two other are titled ‘the EU’s trade agreements and trade facilitation agreements with third countries’ and ‘comprehensive account of tariff preferences’ – however the first one only leads to European Commission’s general page about trade and the latter to Finnish Customs’ business services page. For a resource that contains arguably the most comprehensive and business-oriented guide to free-trade agreements, it is surprisingly difficult to find without knowing where to look. The guide has been published under Team Finland. The page is also available in Swedish and English. Content location: <https://um.fi/how-to-take-advantage-of-eu-trade-agreements>

*European Commission*

The European Commission's resources are more towards policy-makers and revolve around the process of trade agreements and the negotiations themselves. Overviews, reports, transcripts and specific treaties are available publicly. It is important to note that providing services to businesses directly is not on the European Commission's agenda and the practices on preferential tariff treatments are meant to be handled by national customs entities. No guides directly made for businesses are presently available.

*Helsinki Chamber of Commerce*

Currently, the highest matching search result from an organization of any export authority is from the Helsinki Chamber of Commerce. The website in question is an article dated 17.4.2018 from Helsinki Chamber's magazine (Kauppakamarilehti) written by Maija Kärkäs. The article consists of basic information about what the European Union's free-trade agreements are, what benefits can they provide for Finnish companies and what are the prerequisites for utilizing these benefits. The explanation for gaining preferential tariff treatments is informative with a distinctive focus on proving the origin of goods sold. The article suggests official European Union webpages as additional sources of information, however, the links lead to the general pages for negotiations and agreements, trade policies and consultations. Finding material from these sources is left to the reader. Content location: <https://www.kauppakamarilehti.fi/index.php/neuvontapalvelut/hyodyt-irti-vapaakauppasopimuksista/>

Additionally, among the top searches there is also an article dated 22.03.2013 (which is not referenced in this work), which includes an in-depth explanation about the nature of EU free-trade agreements from the Helsinki Chamber of Commerce. No specific author is mentioned. While it contains viable and useful information on what free-trade agreements are and the EU's history of free trade, the rest of the article suffers from outdated information due to its age. The situation of EU's current free-trade agreements and agreement negotiations have changed since. Content location: <https://jasentiedote.fi/fi/jasentiedote/helsingin-seudun-kauppakamari/2013/1/vapaakauppasopimukset/>

*Business Finland*

If Business Finland has something, it is exclusively available to their customers and thus, not visible in the public searches or on their website without a customer login.

*Vapaakauppa.fi*

This website advertises itself as the most comprehensive package on free-trade agreements in Finnish, consisting of reviews from European Commission reports, “critical” free-trade reports and snippets from media conversations on the subject. The site is maintained by the TTIP-network of Finland (TTIP-verkosto), a Helsinki-based group consisting of individual benefactors and unnamed citizen groups. According to the information available on the website, they have active operations in Helsinki, Tampere, Turku, Joensuu and Kotka. The website contains a history-driven explanation on what free-trade agreements are and solely focuses on five different agreements: TTIP (Transatlantic Trade and Investment Partnership), CETA (Comprehensive Economic and Trade Agreement), TISA (Trade in Services Agreement), ACTA (Anti-Counterfeiting Trade Agreement) and MAI (Multilateral Agreement on Investment). Each individual section for the agreements contains relevant reports, publications, official documents and media articles. There are no company-facing guides or recommendations. No specific mentions about the entities responsible for the website and the TTIP-network are available, other than a long list of other organizations they have collaborated with in some extent. The content - and a photo gallery nearly exclusively consisting of rallies and protests – strongly suggest a more political agenda rather than an information service on free-trade agreements. While they have an ‘in English’ option on the site, it only applies to the frontpage. Content location: <https://www.vapaakauppa.fi>



### 3 RESEARCH METHODS

#### 3.1 Research approach

To find out how companies are utilizing free trade agreements and whether it would reflect the original assessments of the Central Chamber of Commerce and Ministry of Foreign Affairs, data from the companies themselves was required. After considering feasibility, existing resources and best possible reach, the end decision became a survey and its targets the member companies of Tampere Chamber of Commerce which are currently exporting. This group made the best research sample for multiple reasons:

- a) Proportionately good sample size
- b) Direct and easy survey distribution via Tampere Chamber of Commerce
- c) History of good response rates
- d) Broad spectrum of different industries

As such, this study considers the companies, referred to in this work as ‘Pirkanmaa-based companies’ because of their regional placement, viable targets to gather data from. At the same time, this survey will provide the commissioner (Tampere Chamber of Commerce) with direct and indirect feedback from their customer-base.

The survey’s goal is to find out how much the Pirkanmaa-based companies know about the European Union’s free trade agreements and how many have utilized them, currently or in the past. Supportive questions look to find data for the perceived quality of information available about free trade agreements, best channels for this information and whether companies are struggling with the process of gaining benefits from the agreements. The platform which the survey was distributed through was Questback, paid for by Tampere Chamber of Commerce, and it was deployed to respondents on 16<sup>th</sup> of November 2018 with two weeks of response time with a reminder sent after the first week. The invitation to the survey itself was sent via mass e-mail to contact and export personnel of the companies. Both qualitative and quantitative data was gathered.

### 3.2 Structure of the survey

The survey questionnaire consists of 15 questions total, built from two separate paths depending on answers given. Questions consisted of multiple choice, grading and open-ended questions. Due to the predetermined distribution group, the questionnaire was done in Finnish. Actual questions were in a more graphical format that does not necessarily translate well from Questback to a written form. As such, answer choices have been converted into a simpler a), b), c)...etc. format here for the purposes of clarity. Questions tagged with 'PATH 1' or 'PATH 2' denote specific paths through the survey, respectively. Answer choices with 5,4,3...etc. represent a 1 to 5 scale, where 5 is always the "best" value and 1 the "worst".

1. Toimiala
  - a) Teollisuus
  - b) Palvelut (myös ICT)
  - c) Kauppa
  - d) Muu, mikä?

Context: Background question. Included to gain data on answer distribution between different industries and enable analysis of answers per industry.

2. Yrityksenne koko (henkilömäärä)
  - a) alle 10 henkilöä
  - b) 10-49 henkilöä
  - c) 50-249 henkilöä
  - d) yli 250 henkilöä

Context: Background question. Included to gain data on answer distribution between different sized businesses and enable analysis of answers per business size.

3. Kuinka hyvin yrityksenne tuntee EU:n vapaakauppasopimukset?  
Asteikolla 1-5:
  - a) 5 (Hyvin)
  - b) 4
  - c) 3

- d) 2
- e) 1 (Heikosti)

Context: One of the main questions of the survey. Crucial data and a measure of companies' current perceived knowledge on free-trade agreements.

4. Hyödyntääkö yrityksenne tällä hetkellä EU:n vapaakauppasopimuksia ja niiden tuomia etuja?
  - a) Kyllä
  - b) Ei
  - c) En osaa sanoa

Pathing: Answer a): 'Kyllä' directed respondents to Path 1.

Answer b): 'Ei' directed respondents to Path 2.

Context: A branch-out question that is also one of the main questions of the survey. Measures current utilization rates as understood by the respondents. Divides the survey into two separate paths to avoid irrelevant answers and to save respondents' time.

5. Kuinka saatavilla tieto vapaakauppasopimuksista, sopimusmaista sekä sopimusten hyödyistä mielestänne on?

#### 5.1 Vapaakauppasopimuksista

Asteikolla 1-5:

- a) 5 (Erittäin hyvin)
- b) 4
- c) 3
- d) 2
- e) 1 (Erittäin heikosti)

#### 5.2 Sopimusmaista

Asteikolla 1-5:

- a) 5 (Erittäin hyvin)
- b) 4
- c) 3
- d) 2

e) 1 (Erittäin heikosti)

### 5.3 Sopimusten hyödyistä

Asteikolla 1-5:

a) 5 (Erittäin hyvin)

b) 4

c) 3

d) 2

e) 1 (Erittäin heikosti)

Context: One of the main questions of the survey, divided into three separate questions. Its purpose is to map out the availability of information on free-trade agreements, agreement countries and benefits of free-trade agreements, as seen by the respondent companies.

### 6. Onko yrityksenne aikaisemmin hyödyntänyt vapaakauppasopimuksia? **(PATH 2)**

a) Kyllä

b) Ei

c) En osaa sanoa

Pathing: Answer a): 'Kyllä' directed respondents to Path 1.

Context: Question intended to make sure that the companies who currently do not utilize free-trade agreements, but have done so in the past, would still provide the survey with relevant data based on their past experiences.

### 7. Kuinka helpoksi olette kokeneet sopimusten hyödyntämisen? **(PATH 1)**

Asteikolla 1-5:

a) 5 (Erittäin helpoksi)

b) 4

c) 3

d) 2

e) 1 (Erittäin haastavaksi)

Context: Support question on the process of utilization and as such, indirectly on the quantity and quality of information sources on free-trade agreements.

8. Koetteko vapaakauppasopimuksista saamanne hyödyn olevan merkittävää liiketoimintanne kannalta? **(PATH 1)**

Asteikolla 1-5:

- a) 5 (Hyvin merkittävää)
- b) 4
- c) 3
- d) 2
- e) 1 (Ei lainkaan merkittävää)

Context: Measurement of how beneficial companies see free-trade agreements, business-wise. Provides additional information on how well companies understand their benefits and utilize them.

9. Kuinka helppoa oli tiedon etsiminen vapaakauppasopimuksista? **(PATH 1)**

Asteikolla 1-5:

- a) 5 (Erittäin helppoa)
- b) 4
- c) 3
- d) 2
- e) 1 (Erittäin haastavaa)

Context: Measurement of how difficult it was to find information on free-trade agreements. This question is aimed towards those who are currently utilizing the benefits.

10. Ovatko sopimukset, ja niiden hyödyntämisen ehdot, tarpeeksi selkeästi esitetty? **(PATH 1)**

Asteikolla 1-5:

- a) 5 (Sopimusten tiedot ovat erittäin selkeät ja helposti ymmärrettävissä)
- b) 4
- c) 3
- d) 2
- e) 1 (Sopimukset ovat erittäin epäselviä ja haastavia tulkita)

Context: Measurement of how difficult the agreements are to comprehend. This question is meant to gauge current sources and how well they present information.

11. Onko yrityksenne kiinnostunut EU:n vapaakauppasopimuksista ja niiden tarjoamista eduista? (**PATH 2**)

- a) Kyllä, olemme kiinnostuneita
- b) Kyllä, olemme kiinnostuneita sekä selvittäneet asiaa
- c) Emme ole kiinnostuneita

Context: A pathing question that also aims to gather data on how many companies are currently interested and/or looking into the matter. One of the questions meant to scan for current needs, which services could be provided for.

12. Mitä kautta olette saaneet tietoa EU:n vapaakauppasopimuksista?

- a) EU
- b) Ulkoministeriö
- c) Kauppakamarit
- d) Business Finland
- e) Muilta yrityksiltä
- f) Konsultit
- g) Emme ole etsineet tietoa
- h) Muu, mikä?

Context: First of the two very important questions with the goal of finding out the best information source on free-trade agreements, according to companies. Comparing the answers from this question to the analysis of current information sources in this paper will hopefully reveal new opportunities and measure “competition”.

13. Mikä kanava on toiminut parhaiten tiedon saamiseen EU:n vapaakauppasopimuksista?

- a) EU
- b) Ulkoministeriö
- c) Kauppakamarit
- d) Business Finland
- e) Muilta yrityksiltä
- f) Konsultit
- g) Emme ole etsineet tietoa

## h) Muu, mikä?

Context: Second of the two very important questions with the goal of finding out the best information source on free-trade agreements, according to companies. Comparing the answers from this question to the analysis of current information sources in this paper will hopefully reveal new opportunities and measure “competition”.

## 14. Miten vapaakauppasopimusten esiintuontia voitaisiin parantaa? (Esimerkiksi kauppakamarien puolesta)

*(vapaa kenttä)*

Context: An open-ended question to collect the companies’ suggestions on improving the visibility of free-trade agreements and their benefits.

## 15. Minkälaisia ohjeita ja työkaluja toivoisitte aiheen puolesta olevan tarjolla?

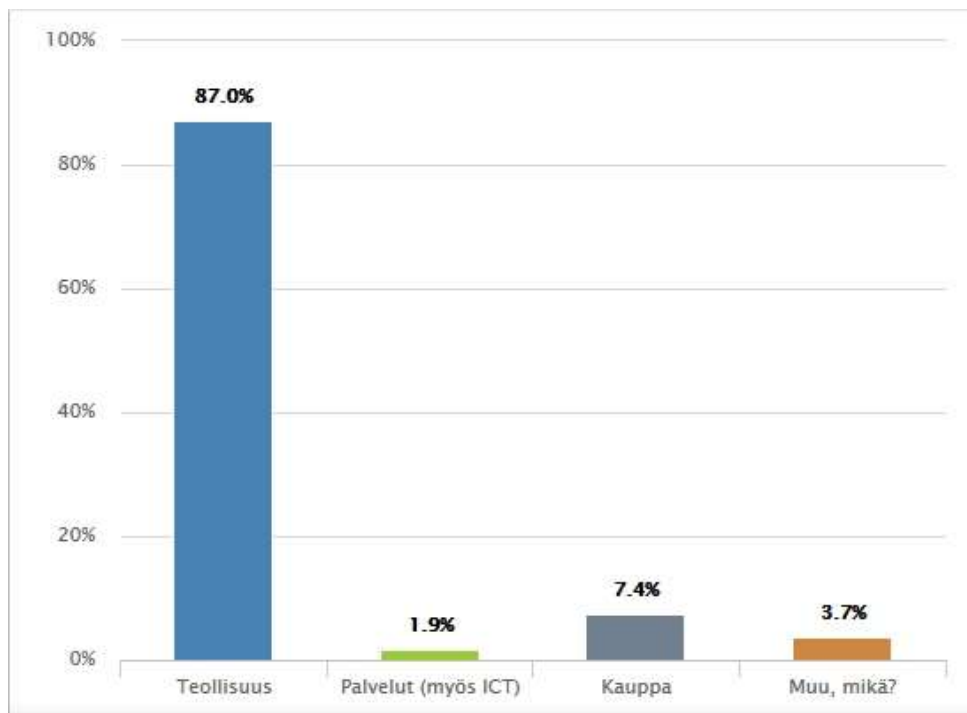
*(vapaa kenttä)*

Context: An open-ended question to collect the companies’ suggestions on new tools or services regarding free-trade agreement usage.

## 4 Responses

Overall, the response rate for the survey was considered good for the time of the year and the two-week response period. The total amount of responses was 53, of those 34 respondents took Path 1 (currently utilizing agreements) and 20 took Path 2 (not utilizing agreements). One respondent went through both paths, which was possible through a certain combination of answers, where they had previously utilized the agreements. Because of this, the number of path responses exceeds total responses by one. 19 respondents filled out one of the two optional questions that asked for suggestions on free-trade agreement visibility. 17 respondents filled out the other optional field that asked for suggestions on new tools or services regarding free-trade agreements. Both very short and very in-depth suggestions were submitted to both questions, which provided extremely valuable information for possible future opportunities and improvements. To better illustrate the relative portions among response options, the answers are displayed here as bar graphs with percentage values. Open-ended question answers are listed separately.

### 1. Toimiala



Muu, mikä?: *Nanotechnology (1), Teknologiateollisuus (1)*

FIGURE 1. Responses to survey question 1



## 2. Yrityksenne koko (henkilömäärä)

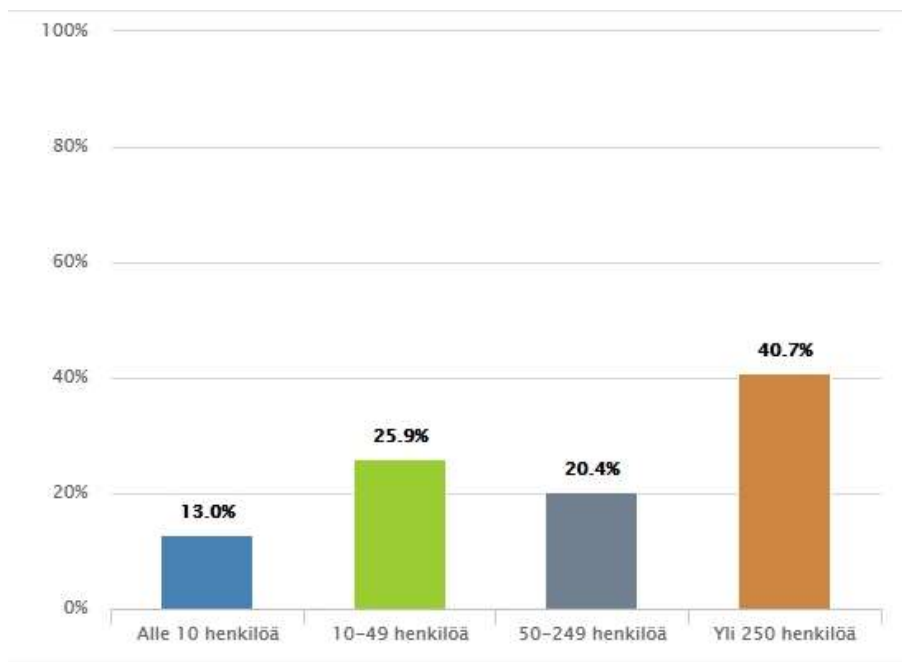


FIGURE 2. Responses to survey question 2

## 3. Kuinka hyvin yrityksenne tuntee EU:n vapaakauppasopimukset?

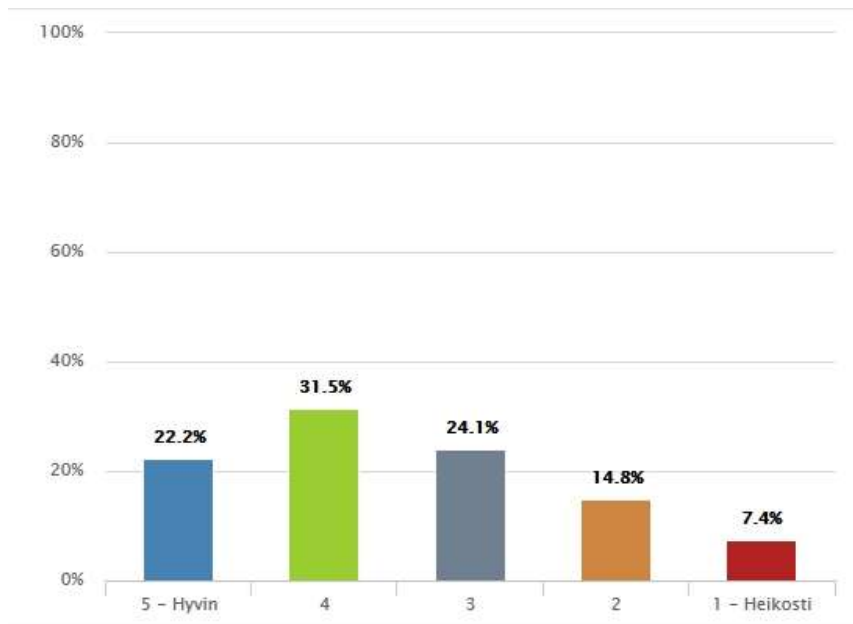


FIGURE 3. Responses to survey question 3

4. Hyödyntääkö yrityksenne tällä hetkellä EU:n vapaakauppasopimuksia ja niiden tuomia etuja?

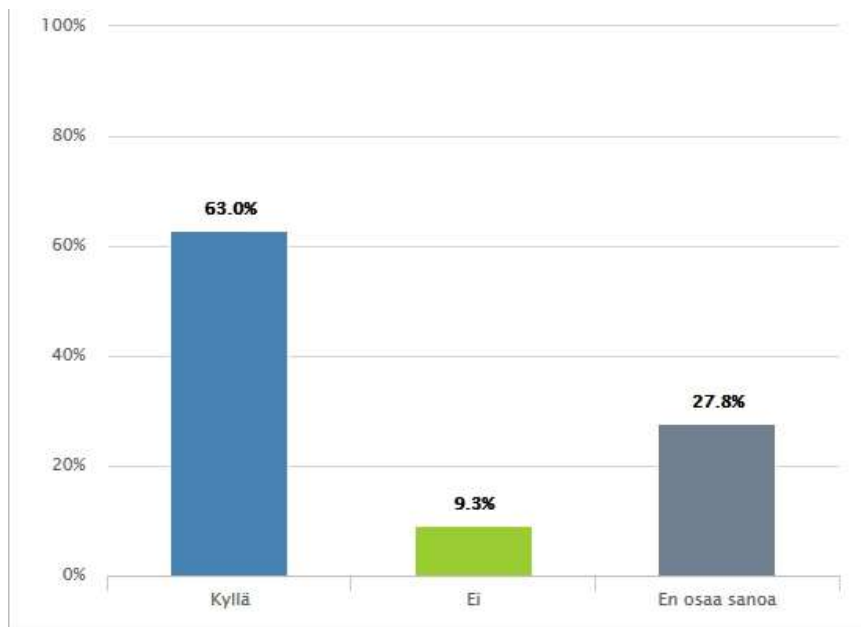


FIGURE 4. Responses to survey question 4

5. Kuinka saatavilla tieto vapaakauppasopimuksista, sopimusmaista sekä sopimusten hyödyistä mielestänne on?

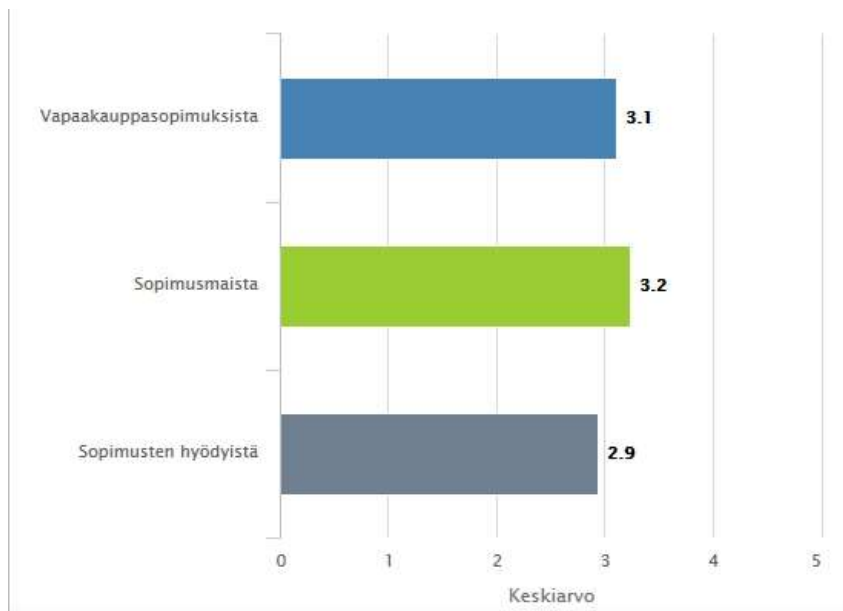


FIGURE 5. Responses to survey question 5

### 5.1 Vapaakauppasopimuksista

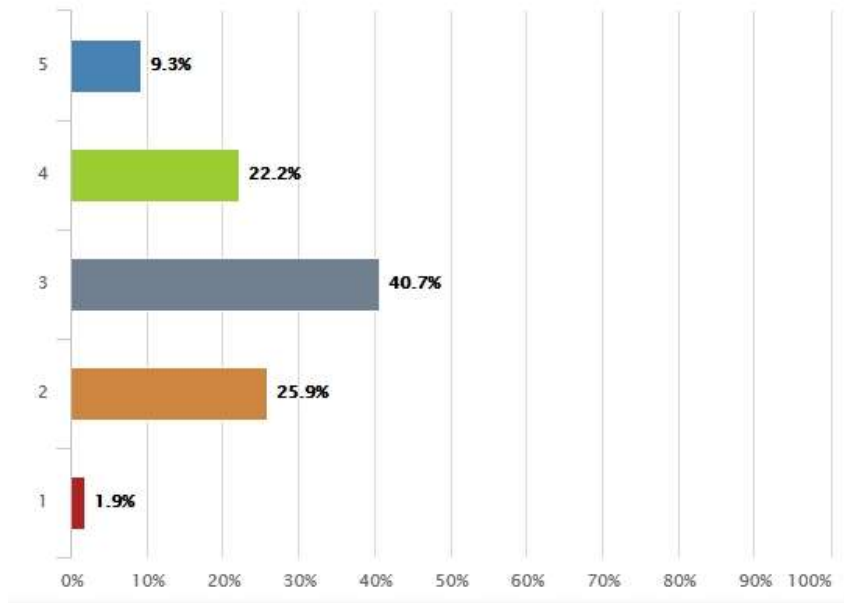


FIGURE 6. Responses to survey question 5.1

### 5.2 Sopimusmaista

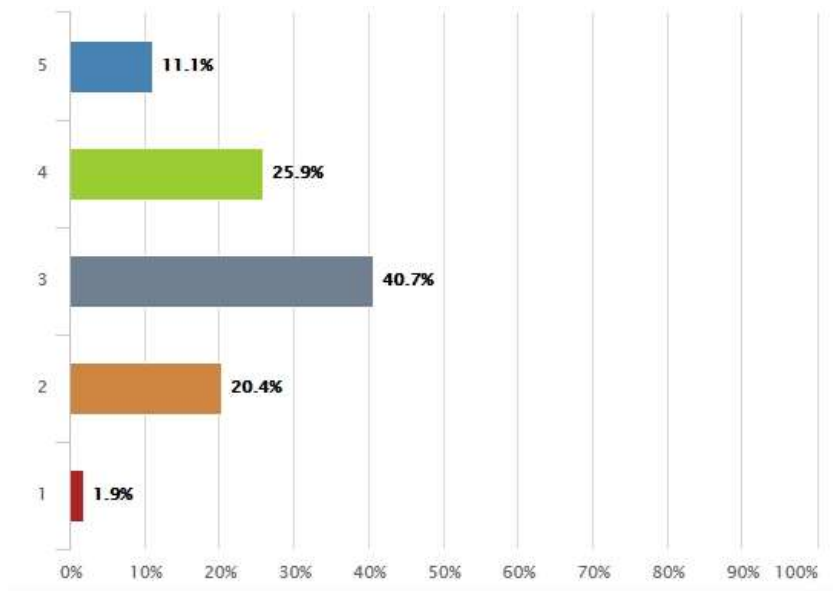


FIGURE 7. Responses to survey question 5.2

### 5.3 Sopimusten hyödyistä

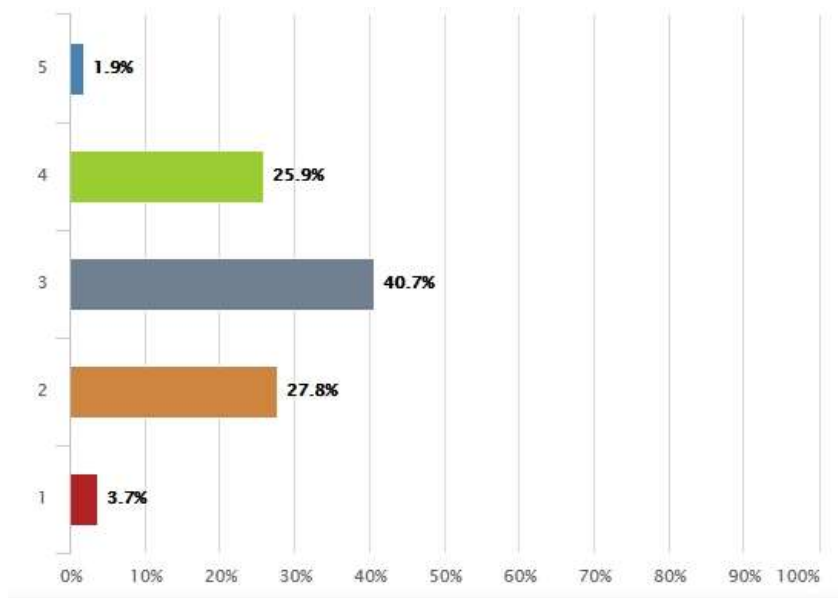


FIGURE 8. Responses to survey question 5.3

### 6. PATH 2: Onko yrityksenne aikaisemmin hyödyntänyt vapaakauppasopimuksia?

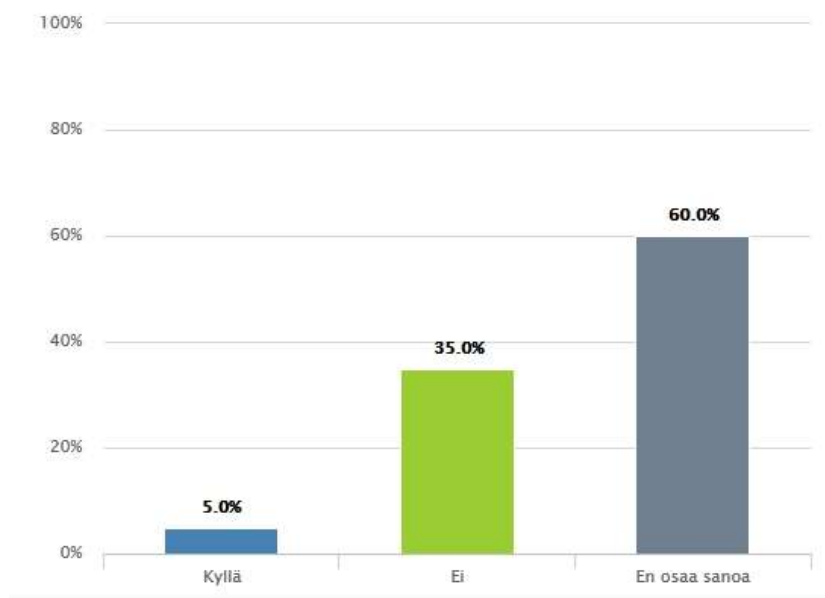


FIGURE 9. Responses to survey question 6

## 7. PATH 1: Kuinka helpoksi olette kokeneet sopimusten hyödyntämisen?

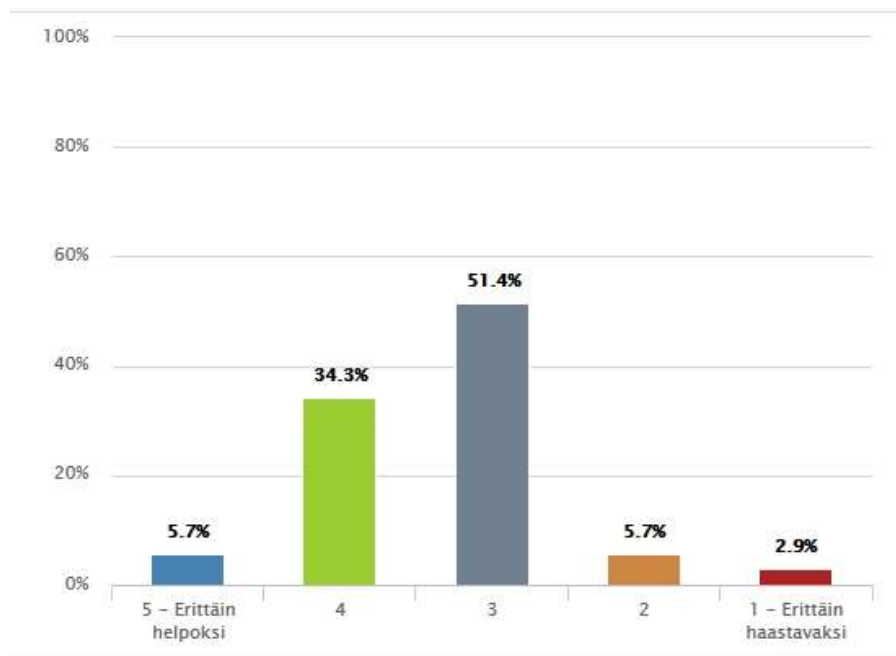


FIGURE 10. Responses to survey question 7

## 8. PATH 1: Koetteko vapaakauppasopimuksista saamanne hyödyn olevan merkittävää liiketoimintanne kannalta?

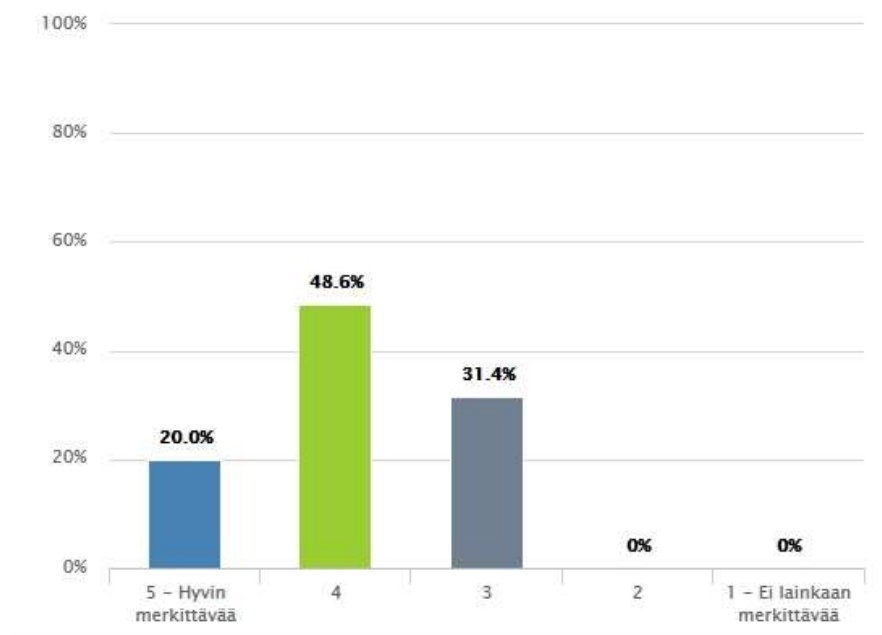


FIGURE 11. Responses to survey question 8

9. PATH 1: Kuinka helppoa oli tiedon etsiminen vapaakauppasopimuksista?

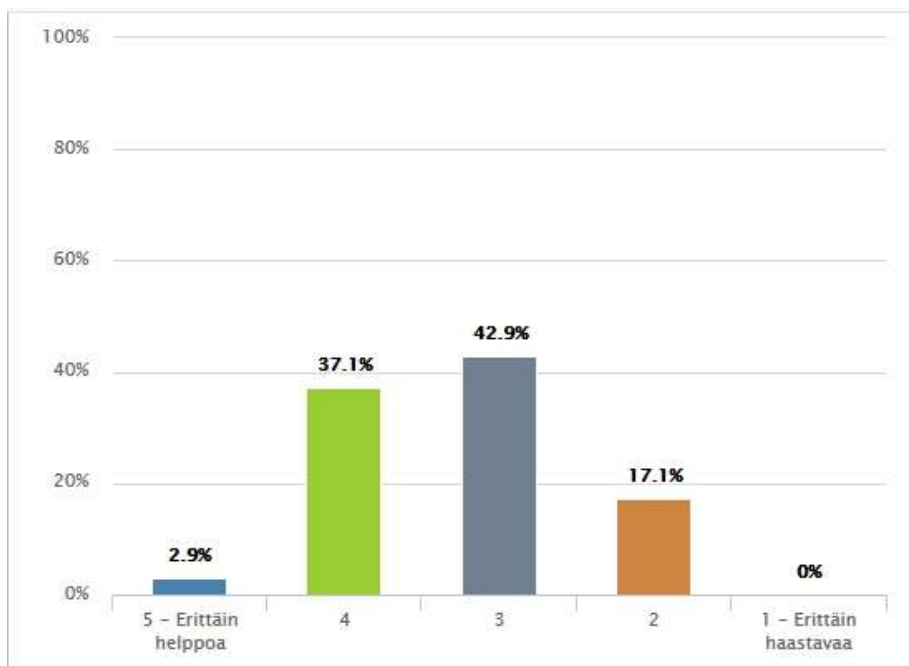


FIGURE 12. Responses to survey question 9

10. PATH 1: Ovatko sopimukset, ja niiden hyödyntämisen ehdot, tarpeeksi selkeästi esitetty?

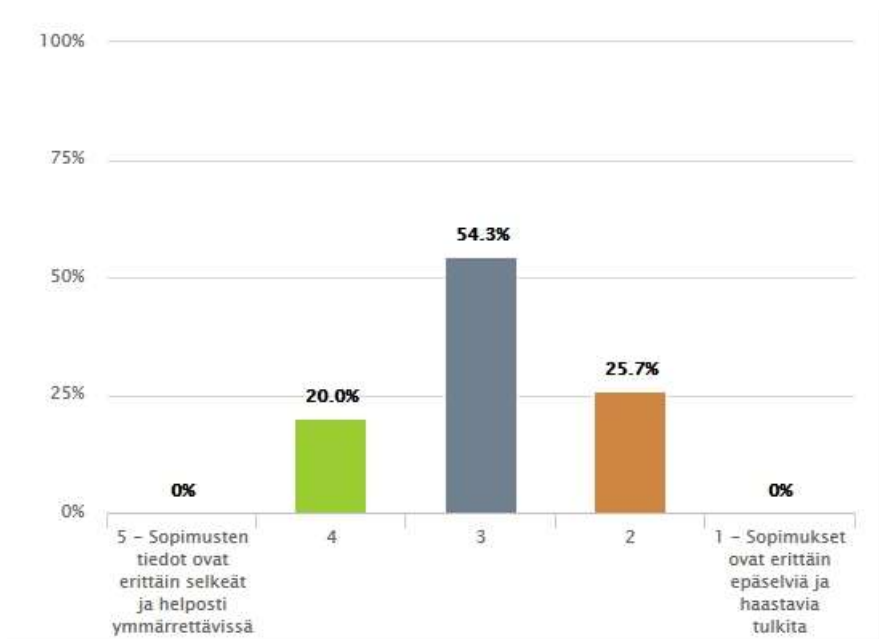


FIGURE 13. Responses to survey question 10

11. PATH 2: Onko yrityksenne kiinnostunut EU:n vapaakauppasopimuksista ja niiden tarjoamista eduista?

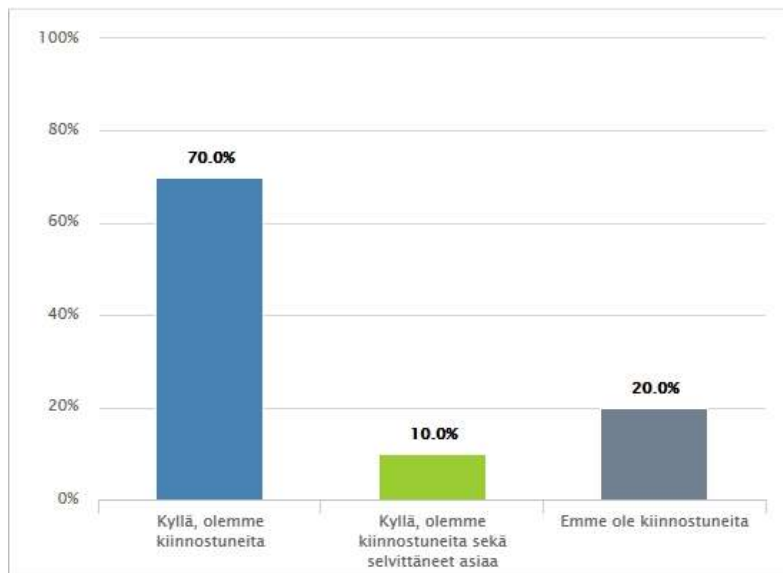
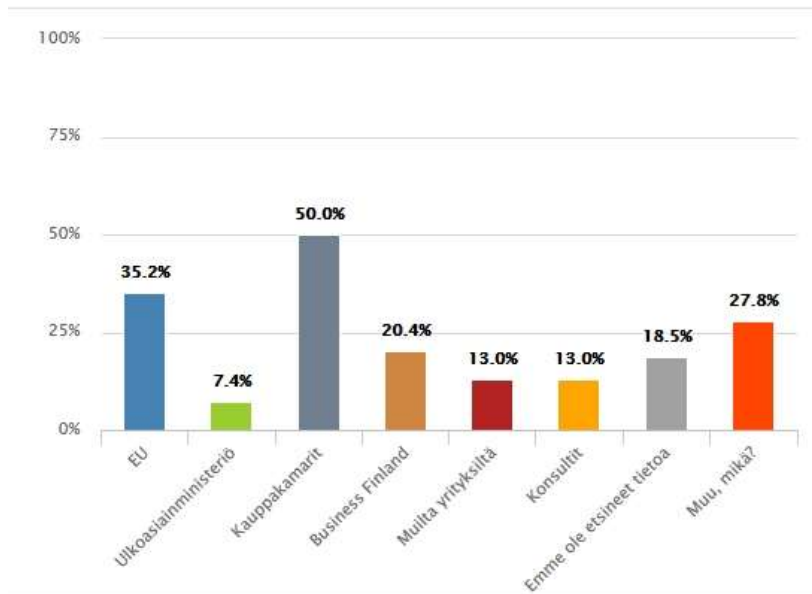


FIGURE 14. Responses to survey question 11

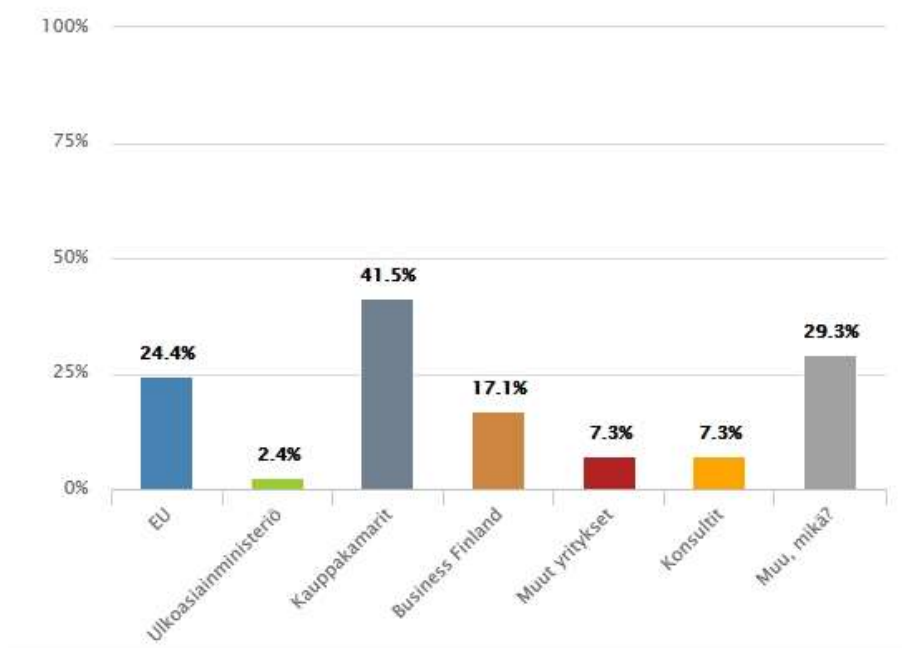
12. Mitä kautta olette saaneet tietoa EU:n vapaakauppasopimuksista?



Muu, mikä?: Tulli (5), muut internet-lähteet (4), oman yrityksen sisältä (3), Finnvera (1), opiskelijien kautta (1), muu koulutus (1)

FIGURE 15. Responses to survey question 12

13. Mikä kanava on toiminut parhaiten tiedon saamiseen EU:n vapaakauppasopimuksista?



Muu, mikä?: Tulli (5), muut internet-lähteet (3), huolitsijat (1), vapaakauppa.fi (1), ei osaa sanoa (4)

FIGURE 16. Responses to survey question 13

### Open-ended questions

14. Miten vapaakauppasopimusten esiintuontia voitaisiin parantaa? (Esimerkiksi kauppakamarien puolesta)

*”Sopimusteksti on juridiikka ja usein käännetty muista kielistä. Sen jäsentämienn ja lyhentäminen selkosuomeksi olisi hyvä.”*

*”Kursseja, koulutuksia sekä suosituksia asiantuntijoista, joita yritykset voi halutessaan konsultoida. Säännöllinen päivitys/infokirje pääasiat sekä kanavat josta saadaan lisätietoja.”*



*”Nykyisin kun tiedon ylläpitäminen on suhteellisen vaivatonta ja sen jakaminen varsinkin, niin ehkäpä selkeintä olisi kerätä ne kaikki samaan paikkaan, josta yritykset voivat ladata ne soveltamista varten. Arkistoa päivitetäisiin, ja sillä lailla luotaisiin taas yksi työpaikka.”*

*”Ottamalla aktiiviseen keskusteluun mukaan”*

*”Koulutus. Sopimusten sisältö (erityisesti alkuperäsäännöt) excel-muotoon - paremmin hyödynnettäväksi. Sopimukset selkeästi yhteen ja samaan paikkaan saataville. Nettipohjainen hakukone.”*

*”Sopimuksien vaatimuksista ja miten niitä käytännössä hydynnetään, tulisi olla saatavilla yhteenvetoja. Itse jouduimme etsimään tiedon EU:n virallisista sopimuksista, jotka ovat hankalasti ymmärrettävää tekstiä. Lisäksi jokaisen sopimusmaan kanssa on oma sopimus, mikä aiheuttaa suuren määrän selvitystyötä ennekuin niitä voi hyödyntää millään tavalla.”*

*”Koulutusten kautta, tiedottaminen alueen yrityksille”*

*”Kooste (vaikkapa tiedotteen muodossa), esim. meneillään olevista neuvotteluista, niiden voimaantulosta, mitä tuotteita sopimus koskee. Nythän käytännössä täytyy komission sivuilla käydä koko ajan kurkkimassa, mitä on meneillään, vai eikö enää olekaan , ja että onko astunut voimaan ja milloin.”*

*”Tarkemmat infoiskut/koulutuspäivät tietyn maan/alueen vapaakauppasopimuksen sisällöstä. Nyt on yleisellä tasolla tiedossa, että vapaakauppasopimuksia on ja niissä etuuksia on, mutta on todella hankala päästä konkreettisemmalle tasolle.”*

*”Voisi toki järjestää jonkinlaisia infotilaisuuksia siihen liittyen.”*

*”Vaikkapa järjestämällä ko asiasta teemapäivä.”*

*”kurseja järjestämällä”*

*”Voisi vaikka käydä läpi käytännön esimerkkejä miten niitä parhaiten voi hyödyntää.”*

*”Ainakin helposti löydettävä lista sopimusmaista ja neuvottelun alla olevista sopimuksista. Selkeät lyhyet ohjeet miten niitä voisi hyödyntää ja pitääkö tehdä jotain erityistä, jotta niistä hyötyisi?”*

*”pitämällä päivitystä asiasta vaikka kertauksena tai jos tulee uutta tietoa.”*

*”Kauppakamarilta ilmoituksia ja muistutuksia liittyen vapaa kauppaa omaan sähköpostiin.”*

*”Uutiskirjeeseen linkkejä blogipostauksiin jossa asiaa käydään läpi.”*

*”Viennistä vastaaville henkilöille koulutusta.”*

*”Ytimekkäillä tiedotteilla.”*

15. Minkälaisia ohjeita ja työkaluja toivoisitte aiheen puolesta olevan tarjolla?

*”Suorat linkit sivuihin joista tarvittaessa lisätietoja. Säännöllisiä tietoiskuja/koulutuksia. Ehkä jopa ”ryhmä” ulkomaankaupan nimissä - joka tapaa säännöllisesti kuten esim. myynti- tai assistenttiryhmä.”*

*”Sopimusten kanssa olisi hyvä saada sitä taustatietoa, joka on tarpeen vapaakauppasopimusten suomien mahdollisuuksien soveltamiseen käytännössä. Mistä esim vaadittavat asiakirjat saa, kuka vahvistaa, etc.”*

*”Selkeitä hands-on -ohjeita. Syvälle pureutuneita ohjeita ja koulutuksia, miten alihankkijan ja tavaran valmistajan tulee toimia alkuperämaan määräyksessä ja tavarantoimittajan ilmoituksen laatimisen kanssa.”*

*”Yhteenvetoja vaatimuksista kunkin sopimusmaan kanssa. Apua valtuutetun viejän luvan hakemiseen, sillä se vaaditaan vapaakauppasopimusten hyödyntämiseen. Erityisesti alkuperäsäännösten ymmärtäminen kunkin sopimuksen osalta on vaikeaa.”*

*”Laskulausekkeet & hankkijan ilmoitukset aina päivitettyinä ja eri kielillä helposti saatavilla. Ilmoitus päivityksistä helpottaisi myös.”*

*”Työkalu, josta voisi valita tuotekategorian, mitä lupanumeroa käytetään mihinkin maahan (perinteinen lupanumero vai FIREX-numero), kauppalaskuilmoituksen käyttämisen edellytyksen täytyminen, esim. onko mahdollisten tavarantoimittajien ilmoitukset kunnossa, onko alkuperälaskelmat kunnossa, jne. Kumulaatio voi olla myös joillekin hankala käsite alkuperää preferentiaalista alluperää laskettaessa.”*

*”Maakohtaisten vapaakauppasopimusten sisällön tarkempaan selvittämiseen tarvittaisiin joku selkeä taho, mistä yritys voisi esim. kysyä, miten meidän toimialan/tuotteen osalta tämä kyseisen maan sopimus, mitä etuja siitä juuri meidän yritys voi hyödyntää ja miten.”*

*”Ehkä jokin koottu tietopaketti voisi olla hyvä”*

*”Omat selkeät sivut nettiin.”*

*”Jotain työkaluja kuinka oppia nopeasti löytämään eur-lexistä tietoa sopimuksista, ja mistä muualta tarkentavia kysymyksiä voi kysyä kuin tullista koska vastaukset eivät ole aina selkeitä, ja vastaus voi vaihdella.”*

*”Vaikkapa joku selkeä nettisivusto, mistä olisi nopeaa ja helppoa hakea tietoja.”*

*”Selkeä ryhmittely ja tiivistetyt selitykset.”*

*”Esim. kauppakamarilla voisi olla jokin ”tietolinkki” asiasta, mistä voisi hakea kohteista”*

*”Kattava kurssitus asiasta kiinnostuneille.”*

*”Suomenkieliset sivustot joissa pelkästään käsitelty /lueteltu eri maat ja niihin liittyvä sopimustieto”*

*”Yhteystietoja ja erityisesti yhteysHENKILÖITÄ, joilta voisi kysyä täsmäapua.”*

*”miten pystyy hyödyntämään vapaakauppasopimuksia”*

#### **4.1 Analysis of the responses**

Significant majority of the companies (87%) are from the field of industry. This means the results are more likely to reflect this particular field. Nearly half of the responses (40%) came from companies that employ over 250 people, with small to medium sized enterprises taking up the next largest quarters. Companies that have less than ten employees represent the smallest fraction with 13% of the responses. As such, the most relevant group for this survey were large, exporting industrial companies in the area. The companies' understanding of free-trade agreements was scattered along the entire response range, leaning towards comprehension rather than non-comprehension. 22% of the respondents would say they understand free-trade agreements very well, whereas 7.4% feel that their understanding of the subject is weak. Most of the respondents felt that they understand the agreements well (31.5%). The spread shows that while companies generally know free-trade agreements well, there is still a fair amount of uncertainty. Over half of the companies (63%) are currently taking advantage of free-trade agreements and their benefits, but nearly a third (27.8%) of respondents were not sure if their company is currently utilizing them. A minority of 9.3% could confidently say that they are not currently reaping the benefits.

Yet again, data shows uncertainty in the matter. While most companies understand free-trade agreements and how to utilize their advantages, there is a group that does not with confidence know how the agreements work and whether their company is currently benefitting from them. When it comes to the availability of information on free-trade agreements, agreement countries and the overall benefits, companies generally rate it neutral with a slight lean towards unavailability, meaning that present material publicly available on free-trade agreements is somewhat difficult to find or hard to access once found (as shown in graphs 5.1, 5.2 and 5.3 in the section above). The process itself is not seen as difficult, meaning that most of the material was found through convenient means, such as web searches.

Just over a half of respondents felt that utilizing free-trade agreements was neither easy or difficult (51.4%), with a lean towards easy utilization. Only 2.9% of the companies

saw it as extremely difficult. The implication that can be drawn from here is that once companies have found sufficient information, they are able to utilize the agreements at ease. As is expected, the beneficiaries consider the advantages to be significant or somewhat significant for their business as they are either seeing direct cost reductions from preferential tariff treatments or expanding operations through enhanced business opportunities. When it comes to the actual content of the agreements themselves and the requirements for taking advantage of them – presented in both official and unofficial sources – companies once again gravitate towards neutral with a negative lean. Over half of the respondents (54.3%) felt that the terms are neither very confusing or very concise, but over a quarter of respondents (25.7%) experienced them as somewhat confusing and difficult to understand. Not a single respondent felt that these were absolutely effortless to comprehend. Of the companies that are not currently utilizing the agreements, the majority (70%) are interested to learn more with some already looking into the matter (10%), showing that there is definite interest among non-utilizers. Few have, however, looked into the matter themselves.

When it comes to searching for information on free-trade agreements, chambers of commerce were the most common source. Half of the companies (exactly 50%) had found it via chambers of commerce. Second most common were the European Union's own resources (35.2%) and third most common being Business Finland (20.4%). Among the 'other' sources, the most common one was Finnish Customs (9.2%). The ranking of these information sources according to the companies remained proportional, with chambers of commerce perceived as the most effective source (41.5%), EU second (24.4%) and Business Finland third (17.1%) with a slight bleed over to other sources somewhat evenly. From what was gathered in the open-ended questions regarding improvement suggestions, on both information delivery and possible new tools or services, the most commonly identified need was training. Several respondents suggested/asked for courses and info-sessions (= training) for their export personnel which would go over the basics, benefits and utilization of free-trade agreements. Among these, clarity on existing materials and newsletters on the matter were also asked for. For new tools and services, multiple answers with a clear background on dealing with free-trade agreements highlighted the need for more country- and agreement-specific information. On the practical side, the demand is for more (and better) web resources accessible at any given time. The overlapping theme is that there are perceived gaps in specifics, which companies feel could be improved upon.

## 5 CONCLUSIONS

Majority of the companies in the Pirkanmaa-region, especially in the field of industry, are currently utilizing free-trade agreements and have managed to do so with relative ease after acquiring the necessary knowledge. Overall, the rate of utilization aligns with pre-existing data with more companies interested in doing so. The keyword on the subject is uncertainty; currently available information sources do not instill confidence in companies and do not market the possibilities and benefits of free-trade in a compelling manner. Business-facing content is left to nationally operating organizations, such as chambers of commerce, to develop and distribute. If we look back to the three datapoints collected on the companies' general understanding of free-trade, the availability of information and the perceived difficulty of utilizing the agreements, a hypothesis can be made that the main barriers for utilizing free-trade agreements are lackluster presentation and poor visibility of relevant information. Good information is hard to find and the information that is easy to find is not as comprehensible or thorough. While there are materials on the generics of free-trade agreements, the practical knowledge available on specifics is also either unavailable or too difficult to find. The companies currently see chambers of commerce as the primary source of information for free-trade agreements by a notable margin. Since the survey was conducted in the active region of Tampere Chamber of Commerce, it shows that companies trust and value them as an authority and assistant on the matter, which brings ample agency to improve and fulfill the companies' needs. This brings us to the new identifiable opportunities for Tampere Chamber of Commerce. To combat the uncertainty, there is a clear wish for more education and training, as well as making available information more convenient and cohesive. Based on the survey results, the most profitable opportunity is to introduce a new product in the form of free-trade agreement training, which then could be sold to companies. The results from this study indicate that there is some demand, but more importantly such service is missing from other providers, generating a chance to solidify Tampere Chamber of Commerce as the "industry standard" source of free-trade related information. With the current shift of changes to the Transatlantic Trade and Investment Partnership, free-trade agreements and the issues surrounding are raising new questions. Companies, even those currently utilizing the agreements, have expressed their wishes for better communication and more updates. Alternatively, or additionally, an article in the chamber's magazine or an e-newsletter might alleviate the more imminent concerns and hunger for up-to-date information. This option would however be work without an additional payout.

## 6 SUMMARY

This thesis set out to find how much companies in the Pirkanmaa-region, specifically companies that are members of Tampere Chamber of Commerce, know about free-trade agreements – and how many are actively utilizing their benefits. First, we needed to break down what free-trade agreements are and why businesses should be interested in them. The nature and functions of these treaties were explained and identified, piece by piece, from a point of view of no prior knowledge. Based on data from the Ministry for Foreign Affairs of Finland, utilization rates of free-trade agreements could still be improved upon and as such, the thesis also aimed to find where that room improvement could be found and what means can be taken to achieve it. Knowledge is what bridges the gap between successfully taking advantage of the agreements and not acknowledging them at all. Because of this, the thesis compiled and analyzed sources of information, focusing on online resources, on the subject from a perspective where one does not know where to look. Each source, who they were and what they offered, were laid out and examined in terms of comprehensibility, availability, visibility and most importantly, quality of content. This was an important step for both targeting potential faults in the whole process and finding new opportunities to capitalize on for the commissioner of this study. To gather data on the core subject of this thesis, the utilization rate of free-trade agreements, a survey was deployed to all exporting Pirkanmaa-based companies with an active Tampere Chamber of Commerce membership. With a two-week response period, the survey received what was considered a good response rate and produced a healthy amount of data not only on utilization rates, but the perceived difficulty of the process, the quality of supportive material, the quality of different information sources, as well as plenty of suggestions and wishes on the company-facing presentation of free-trade agreements. Overall, companies within the survey group are reaping the benefits of free-trade quite well, but many still see some uncertainty and wish for a clearer delivery. The chambers of commerce are viewed as the go-to source for free-trade related knowledge and as such have the biggest agency to improve, but not without the opportunity for new gains. In a world at the brink of trade wars and free-trade negotiations running hot across the globe, it is now more important than ever to establish confidence in companies that have their eyes and money in international trade, hopefully generating a competitive advantage for both the businesses – and those who enable them.

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