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EUROPEAN RESEARCH PROJECT //

Collecting and analysing data for the post-27 INTERREG (Core-IB)

Belgium-Netherlands

Border profile

March 2026

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This delivery does not necessarily reflect the opinions of members of the ESPON 2030 Monitoring Committee.

Coordination
Andreea China, Laura Dimitriu, Martin Gauk, Nikos Lampropoulos, Nicolas Rossignol – ESPON EGTC

Lead authors
Tobias Chilla, Dominik Bertram, Elias Günther, Stefan Hippe – Friedrich-Alexander University Erlangen-Nürnberg
Irene McMaster, Heidi Vironen, Neli Georgieva, Stefan Kah, Virginia Arena – Stichting EPRC Strathclyde University
Roland Gaugitsch, Sabrina Mansutti, Helene Gorny, Michelle Wiest, Erich Dallhammer, Cristian Andronic, Manon Badouix, Chien-Hui Hsiung, Robert Badea – ÖIR GmbH
Vít Pászto, Radek Barvíř, Karel Macků, Jaroslav Burian, Zdena Dobešová, Oldřich Bittner – Palacký University Olomouc

Steering Committee
Jean-Pierre Halkin, Gaëlle Doleans, Simona Pohlová, Maria Sioliou, Robert Spisiak – Unit D2 Interreg, Cross-Border Cooperation, Internal Borders, Directorate-General for Regional and Urban Policy, European Commission (EC-DG Regio)
Milada Hronkova – Ministry of Regional Development, Department of European Territorial Cooperation (CZ)
Josiane Meier - Federal Ministry for Housing, Urban Development and Building, Division Spatial Planning, Spatial Planning Law and European Spatial Development Policy BMWSB (DE)
Margarita Golovko – Ministry of Regional Affairs and Agriculture (EE)
Olivier Bichel, Sébastien Keiffer– Ministry of Housing and Spatial Planning, Department of Spatial Planning (LU)

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Contact: info@espon.eu

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1 Introduction

1.1 Context and objective of the border profile

The ESPON Core-IB project (Collecting and analysing data for the post-27 INTERREG) provides evidence-based, non-binding analytical work to support the next generation of Interreg programmes post-2027. By collecting and analysing harmonised territorial data, the project highlights key socio-economic characteristics, cross-border interactions, and governance structures. Its spatial focus covers 48 cross-border cooperation areas (40 land and 8 maritime), including all EU internal border regions and those bordering Liechtenstein, Switzerland, and Norway. The findings are analytical and informative; they do not create regulatory or policy obligations for Member States, the European Commission, or programme authorities. Each border profile serves as a comparable knowledge base for policymakers at EU, national, and regional levels, supporting dialogue and reflection rather than prescribing policy choices. The profiles aim to provide consistent, data-driven territorial evidence that can inform strategic discussions about future cross-border cooperation and contribute to the preparation of Interreg programmes post-2027.

The Core-IB border profiles are designed to support the upcoming steps in the Interreg programming process with analyses based on data that is available at the European scale, including ESPON, Eurostat, DG REGIO, JRC, and Interreg databases. Their main purpose is to ensure comparability of data analyses and to provide programme areas with access to recent harmonised data at high geographical resolution (NUTS3 level or finer). Member States may hold additional or more detailed data which can further enrich or contextualise the findings beyond the Core-IB project. These national sources are essential for refining and validating territorial evidence in policymaking processes, including additional regional, fine-scale information and insights from political processes related to prioritisation and objective setting. All border profiles follow a systematic and methodologically robust approach. They provide territorial evidence, structured along 6 thematic dimensions, offering insights into the geographic, economic, environmental, socio-economic, border security and governance characteristics of the border region. Quantitative data and qualitative analyses are combined to ensure meaningful insights into all 48 border areas. Due to methodological constraints and limited resources, local studies and national datasets falling outside the European data framework could not be included. Visualisations, such as maps and charts based on descriptive statistics, facilitate understanding and support evidence-based policymaking. The profiles analyse the border region as a whole at NUTS3 (2021) level (corresponding to the current Interreg VI-A programme area)[1] and position it within a broader European context. For comparative purposes, several reference categories are applied:

- European averages (EU27 + Norway, Switzerland and Liechtenstein, depending on data availability)
- National averages
- National border region averages
- Aggregated border region averages

To complement the quantitative evidence, the profiles also draw on strategic and qualitative sources, including:

- Strategic documents from the Interreg Programme 2021-2027
- Border Orientation Papers from the 2021-2027 programming period
- Information from the keep database on cross-border cooperation activities
- Information from the Cohesion Open Data platform
- Information from the b-solutions initiative
- Information from recent ESPON Projects (i.e., CROSSGOV, House4All, PROFECY Update, CPS 2.0)

[1] As defined by Annex 1, Commission Implementing Decision (EU) 2022/74 of 17 January 2022, as amended by Commission Implementing Decision (EU) 2023/1638 of 14 August 2023 (OJ L204, 17.8.2023, p. 9): https://eur-lex.europa.eu/eli/dec_impl/2022/75/oj/eng

Within the ESPON framework, the CROSSGOV project (Governance mechanisms for cross-border functional areas) has been implemented in parallel to Core-IB. The CROSSGOV hub[2] provides a comprehensive platform for interactive data exploration, and selected data have been incorporated into this study.

Additional project-related information can be explored separately in the Core-IB **Final Report**. Further technical information on this border profile can be found in a separate **Technical Annex** providing an overview of data and methods.

1.2 Presentation of the border area

The INTERREG VI-A border region Flanders-the Netherlands covers the area between northern Belgium and the southern Netherlands (see Figure 1.1). In Belgium, the programme area includes the regions of East Flanders, Antwerpen, West Flanders, Limburg, and Flemish Brabant in Flanders, comprising a total of 19 NUTS3 regions. In the Netherlands, it covers parts of the regions of Zeeland, Limburg, and North Brabant in South Netherlands, encompassing a total of 9 NUTS3 regions.

Figure 1.1: Overview map

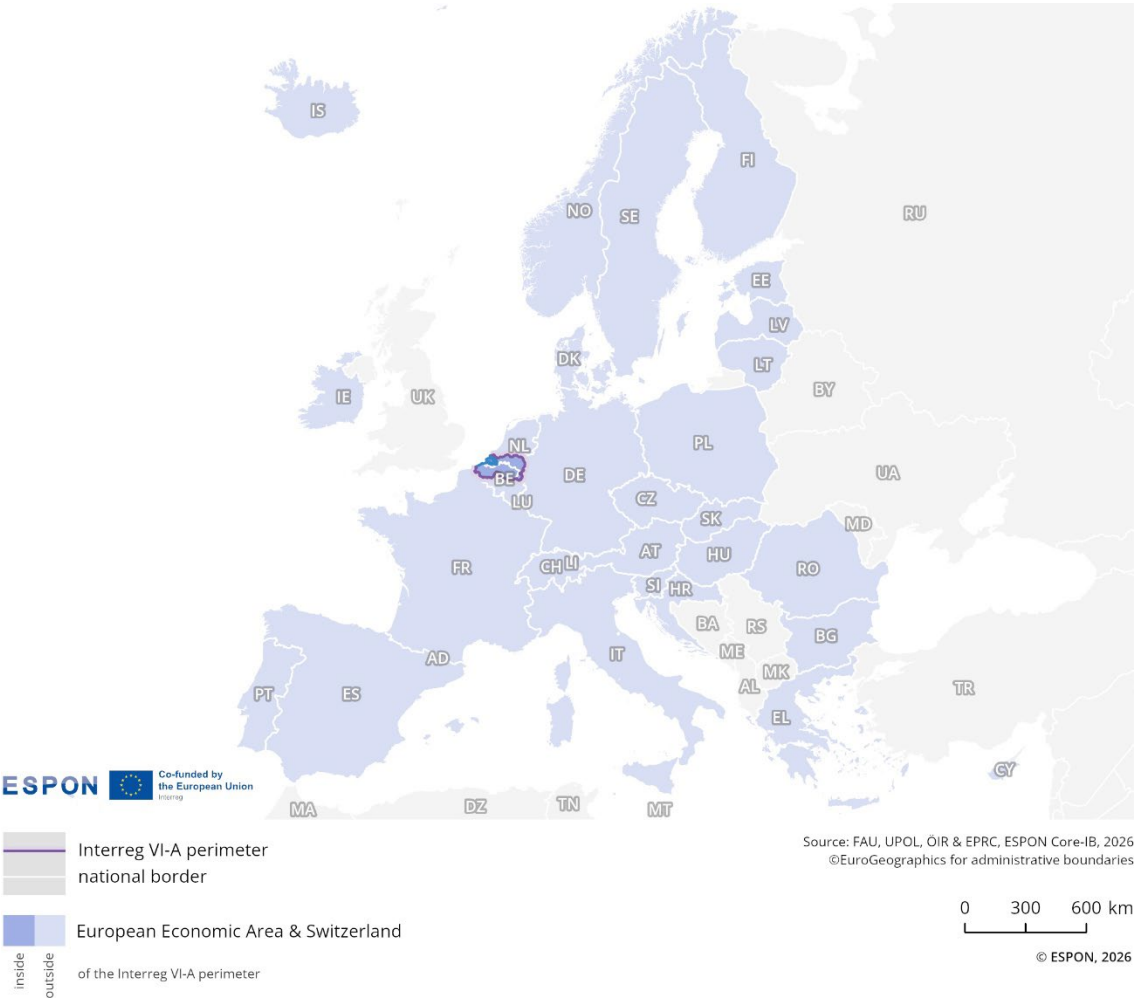
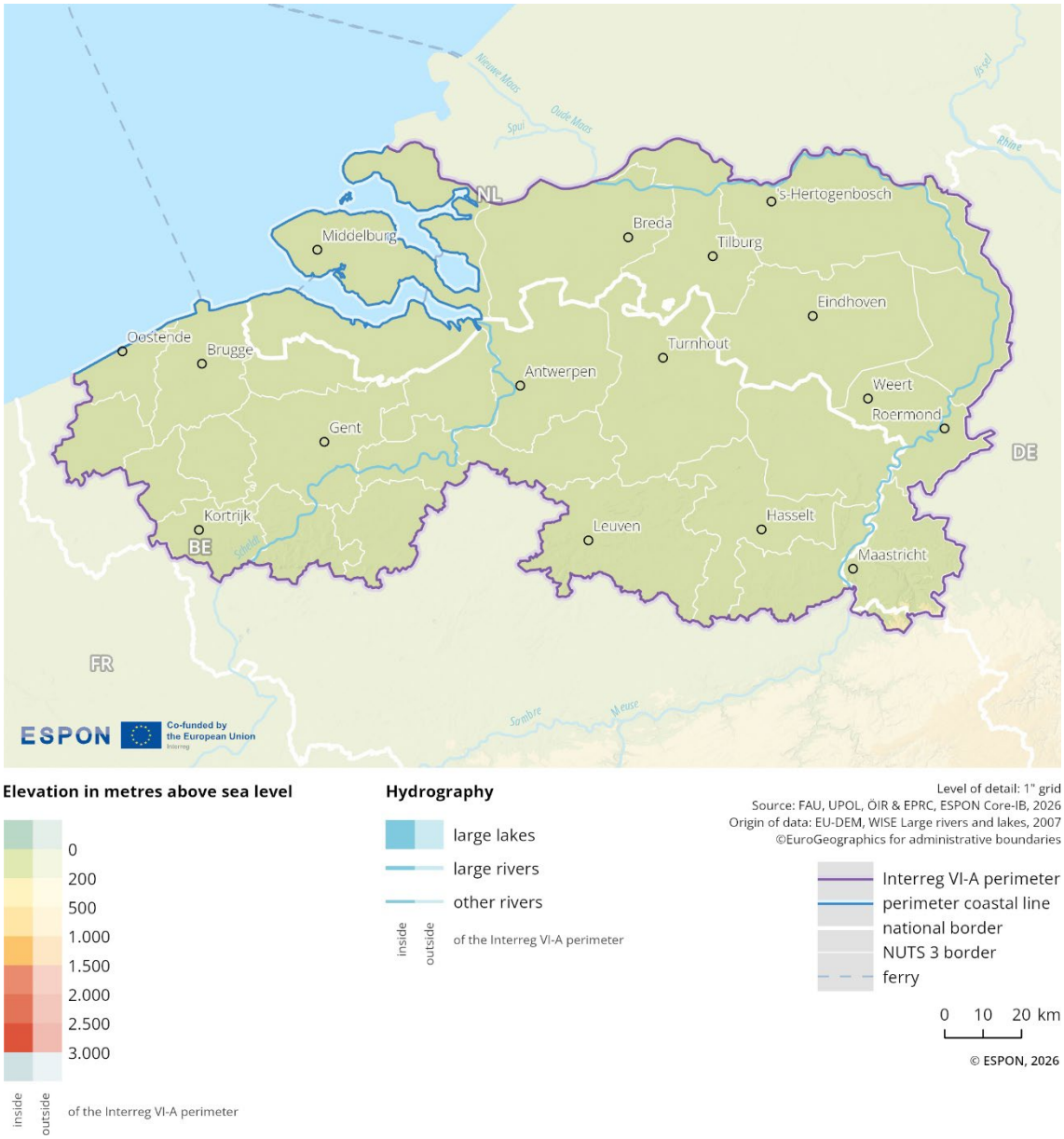


Figure 1.2 illustrates the region's geomorphological features and the perimeter of the current INTERREG VI-A programme area.

[2] ESPON CROSSGOV Hub: https://gis-portal.espon.eu/arcgis/apps/experiencebuilder/experience/?id=27e3b86ef44441b08793a2239c370607

Figure 1.2: Geographical features and characteristics[3]



The programme area borders largely follow the course of the river Meuse (Maas) to the north and east, the North Sea to the west, and coincide with the Flemish Region border to the south. The programme includes larger cities such as Antwerpen, Gent, Leuven, and Brugge in Belgium, and Eindhoven, Breda, Middelburg, and Roosendaal in the Netherlands. The landscape is predominantly flat - generally up to 200 metres above sea level - with some elevation south of Maastricht reaching up to 375 meters. It forms part of the North European Plain. It has been predominantly shaped by fluvial and marine processes, resulting in extensive river valleys, polders, alluvial plains, coastal lowlands and dune landscapes along the North Sea coast. The region's hydrological structure is characterised by major river systems, including the Meuse and Scheldt (Schelde), as well as several canal networks. The deltaic nature of the western part of the programme area, particularly in the provinces of Zeeland and West Flanders, has created a complex landscape comprising tidal flats, estuaries, wetlands, and diked agricultural land.

[3] The selection of displayed settlements is based on factors such as size, administrative or cultural importance, transport links, regional coverage and cartographic clarity. This is part of a standard cartographic generalisation process with no pre-set thresholds, and the main aim is to provide orientation.

The programme area is defined by its historical and ongoing relationship with water: large-scale water management systems, such as polders, canals, sluices and dykes dominate the landscape and have been essential in shaping human settlement and land use. The coastal regions, particularly in Zeeland and along the Belgian coast, feature significant dune systems, artificial coastal protections, harbours, and sea locks.

The cross-border region is both highly urbanised and agricultural, characterised by a dense network of cities, towns, and villages, including major urban corridors such as Antwerpen–Breda–Eindhoven. Natural areas, including several Natura 2000 sites, are concentrated mainly along the Meuse valley, the coastal and dune zones, and the Campine (Kempen) area, with smaller patches scattered throughout the urbanised territory.

2 Cross-border analysis

2.1 Territorial dimension

The territorial dimension refers to the spatial characteristics and dynamics of a border region. It specifically depicts how factors such as population density, demographic trends, changes in settlement areas and accessibility influence and reflect cross-border integration.

2.1.1 Population and settlements

This sub-dimension illustrates the population characteristics and land use dynamics of the border region, based on analysed indicators. It examines population density, population development by age groups, and changes in settlement areas. The analysis highlights whether the border functions as a catalyst for integration or as a barrier. Comparisons with the respective countries and the EU average provide context for understanding the region's dynamics.

2.1.1.1 Population density

Indicator description

Population density refers to the number of residents per km². This indicator shows the number of inhabitants per square kilometre in a 1x1 km grid. It therefore provides information on the distribution and concentration of population across the region and allows to identify agglomerations of high density. In particular agglomerations at or close to the border area of key interest.

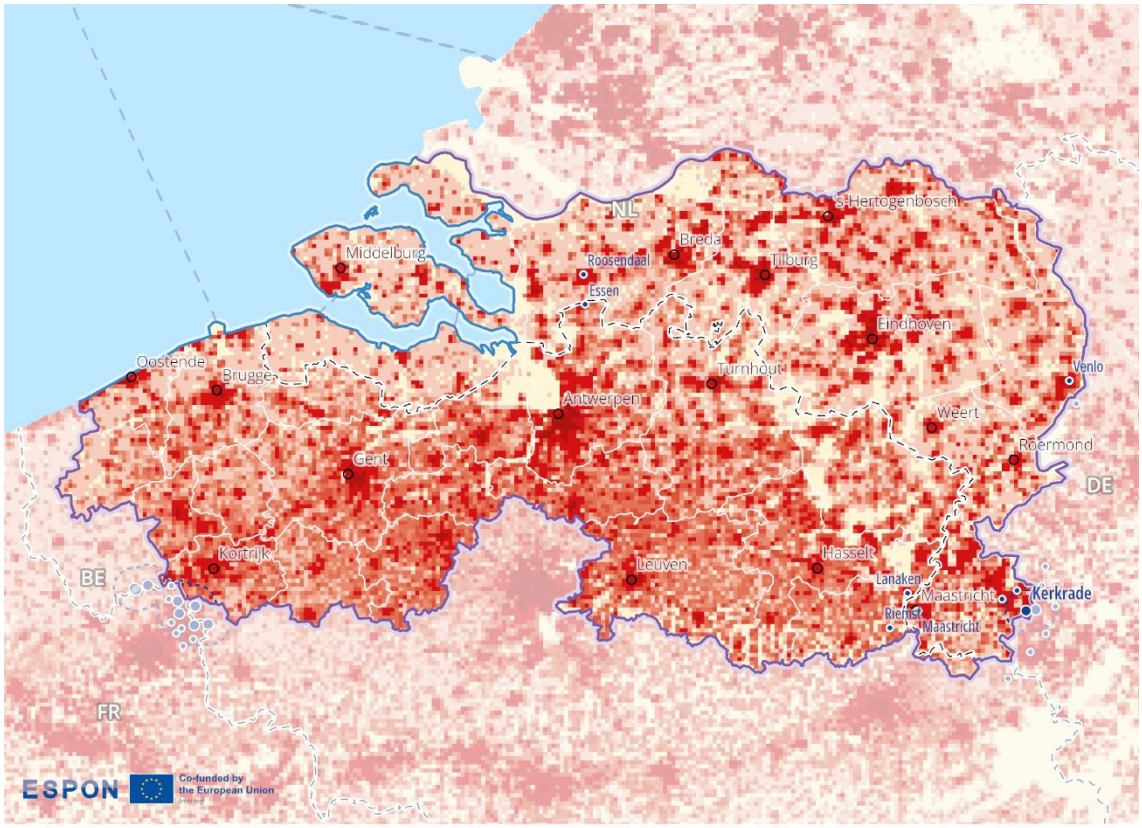
- **Source**: Eurostat
- **Temporal coverage**: 2021
- **Unit**: Inhabitants/km^2

Please refer to the technical annex for more information.

This border area is one of the most densely populated cross-border regions in the EU, with the highest number of settlements. The Belgian side of the programme area is more evenly and densely populated than the Dutch side. The density of the population decreases slightly towards the coast. The largest urban centre in the cross-border region is Antwerpen, with more than 500,000 inhabitants. Other large Belgian urban centres are Ghent and Brugge (both over 100,000 inhabitants). In the Netherlands, the population is concentrated in and around cities, including Maastricht (more than 100,000 inhabitants), Breda, Tilburg and Eindhoven. Around these cities, population density declines faster than in the surrounding areas of the Belgian towns, due to the intense exploitation of the agricultural landscape.

The population density of the border region is 460 inhabitants/km², which is significantly higher than the EU average of 109 inhabitants/km² (according to EUROSTAT), and the aggregated average of all EU evaluated border regions, which is 125 inhabitants/km². The programme area in Belgium has an average population density of around 482 inhabitants/km², which also exceeds the national average population density in Belgium (372 inhabitants/km²). The programme area in the Netherlands has an average population density of around 419 inhabitants/km², therefore lower than the national average population density in the Netherlands (455 inhabitants/km²).

Figure 2.1: Spatial patterns of population distribution



Number of inhabitants/km² (2021)

- 1–50
- 51–100
- 101–200
- 201–500
- 501–1,000
- 1,001–5,000
- 5,001–56,158
- no population

inside / outside of the Interreg VI-A perimeter

Twin cities (2025)

cities/towns with 10,000+ inhabitants not further than 5km from another one accross a country border

Border cities (2025)

other cities/towns with 10,000+ inhabitants not further than 10km from another one accross a country border

Level of detail: 1km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: GISCO Population Grid (version 1.3), 2021
OpenStreetMap, 2025
©EuroGeographics for administrative boundaries

- Interreg VI-A perimeter
- perimeter coastal line
- national border
- NUTS 3 border
- ferry

0 10 20 km

2.1.1.2 Population development (by age groups)

Indicator description

Population development refers to the percentage change in population at regional level between 2014 and 2024. The data reflects on the total population, as well as on the age groups 0-14, 15-64 and 65+.

- **Source**: Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2024
- **Unit**: Change in %

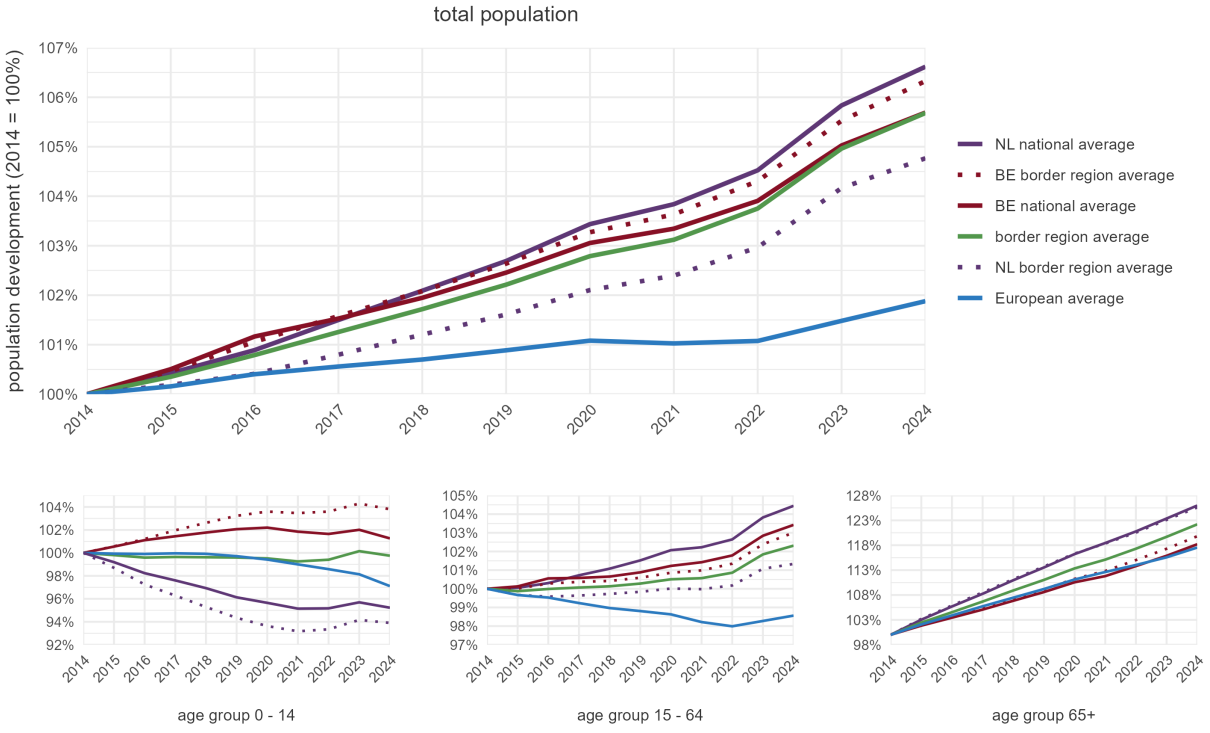
Please refer to the technical annex for more information.

Population in the cross-border region in 2024 (Eurostat): 10.17 million inhabitants, of which:

- 59.0% in the Belgian part (6.00 million inhabitants)
- 41.0% in the Dutch part (4.17 million inhabitants)
- Region within the border region with the highest population increase since 2014: Arrondissement[4] (Arr.) Sint-Niklaas (BE236) at 8.9%

Figure 2.2 shows the population growth in the border region between 2014 and 2024. The region experienced moderate growth of 5.7%, with the highest growth rate observed in the Belgian part of the programme area.

Figure 2.2: Population development (2014=100)



[4] Administrative unit corresponding to NUTS3 level.

Population growth in the region is above the European average (5.5% vs. 1.9%) and noticeably above the average development in all border regions (5.5% vs 1.5%). The Dutch part of the programme area has recorded a slightly lower growth rate than the national average (4.8% vs. 6.6%), while an opposite trend is observed on the Belgian side (6.3% vs. 5.7%).

In terms of the development of individual age groups in the region, the population aged 0–14 is relatively stable with change of -0.2%, while the working-age population (15–64) showed a slight increase of 2.3%. The population aged 65 and over underwent a substantial increase of 22.2%.

2.1.1.3 Change in settlement areas

Indicator description

The indicator shows the relative change in settlement areas per LAU in the border region. It considers changes in land cover, from non-artificial areas (such as agricultural, forest and seminatural areas, wetlands and water bodies) to artificial areas (such as urban, industrial, construction sites) between 2012 and 2018. This indicator has to be viewed alongside population development in particular.

- **Source/method of retrieval**: The indicator is retrieved via processing of raster data from CORINE Land cover. The raster information is crossed with Local Administrative Units (LAU) to calculate a change in %.
- **Temporal coverage**: 2012-2018
- **Unit**: Change in %

Please refer to the technical annex for more information.

Figure 2.3 illustrates the change in settlement areas at municipal level between 2012 and 2018. Overall, it shows slightly different patterns of change on the 2 sides of the border. In Belgium, changes are evident around the urban centres - Brugge, Gent, Antwerpen, Hasselt, etc - with Brugge showing some of the highest increase. On the Dutch side, settlement areas have expanded across much of the territory, both near the border and further inland. The extent of settlement growth shows no clear distinction between core urban centres and surrounding areas. High growth in settlement areas is particularly evident around Breda and Maastricht. However, in some areas, such as natural parks and urban zones like Roermond in Limburg, there has been no increase.

Figure 2.3: Settlement area dynamics

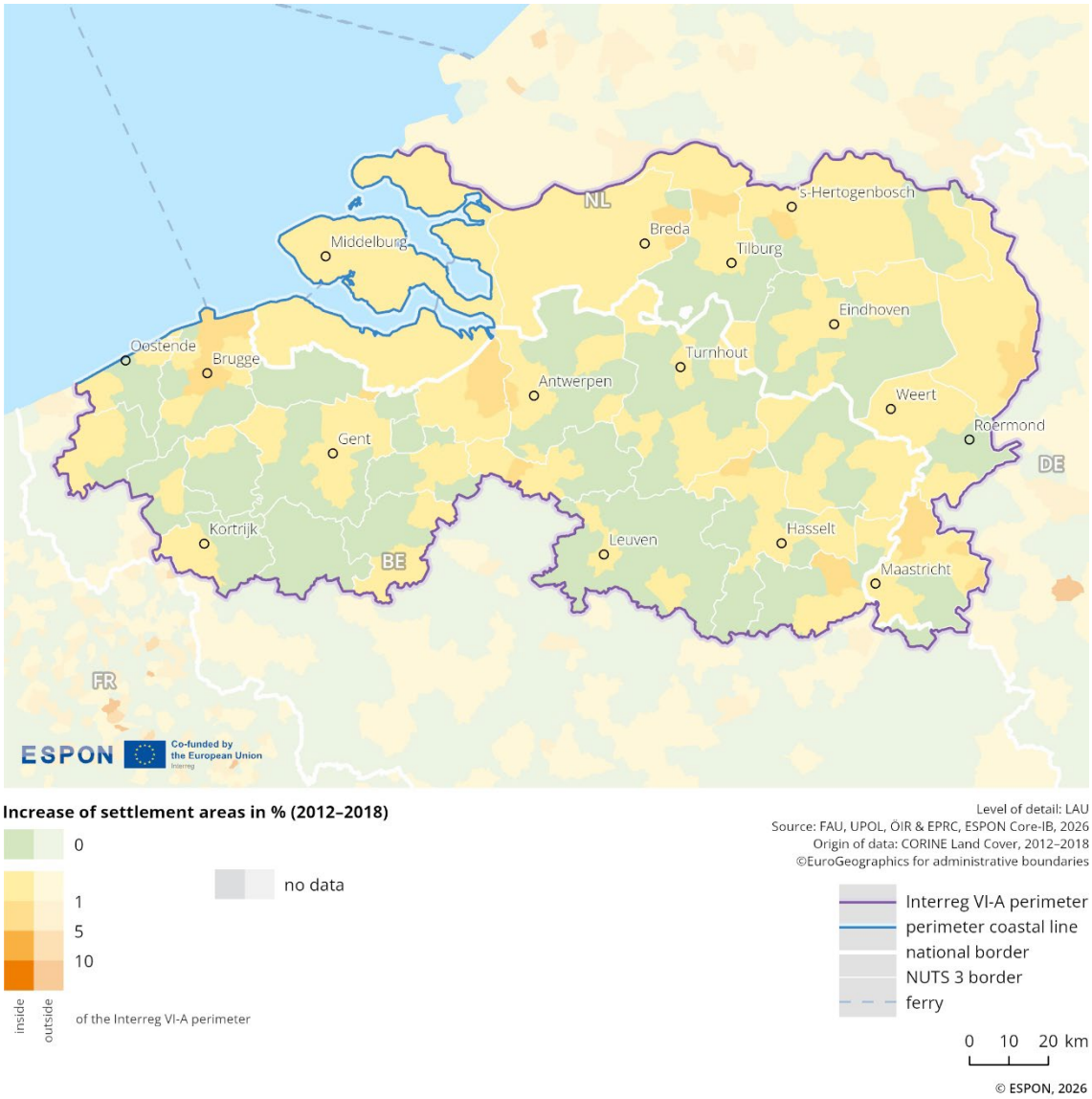
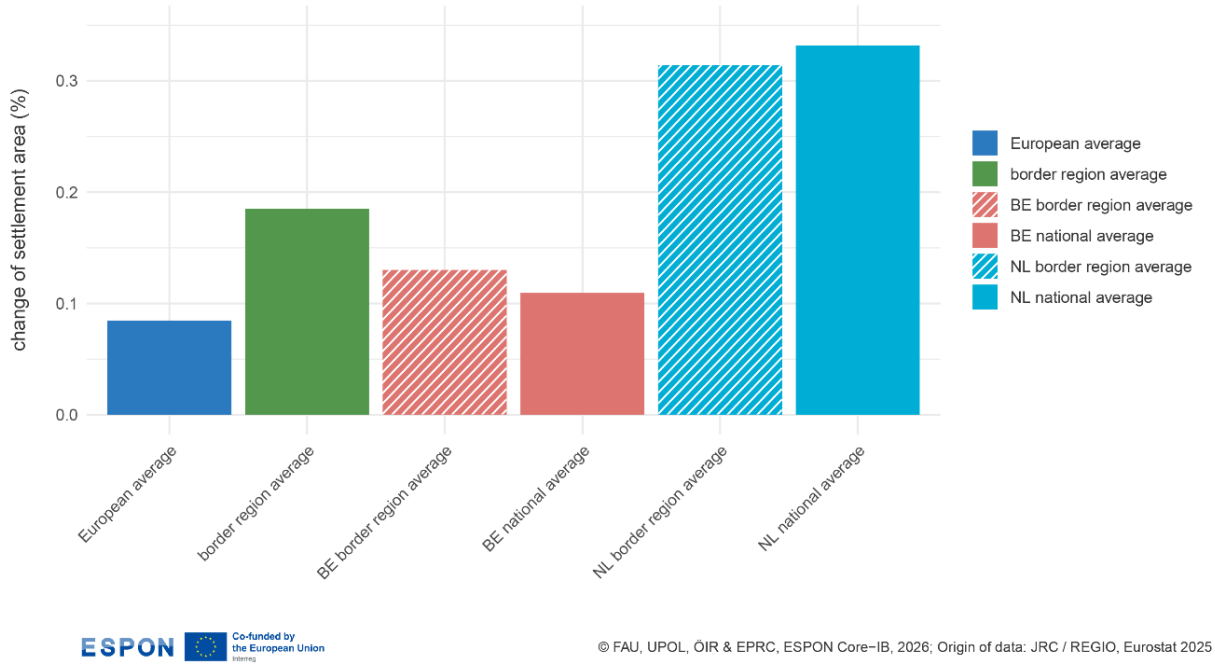


Figure 2.4 presents the change in settlement areas from a comparative perspective. The average change for this cross-border region is higher than the overall European average, which includes both EU member states and the EFTA countries Switzerland, Liechtenstein, and Norway. The Dutch values are higher than the Belgian ones, for both the national average as well as the border region. The relative dynamics differ within each national context. The Belgian border region records a slightly stronger increase than the Belgian national average, whereas the Dutch border region grows somewhat more slowly than the national trend.

In general, however, the cross-border region shows a very dynamic settlement development in what is already a densely populated area. Therefore, there is a need for integrated spatial development planning to balance demands on land use going forward.

Figure 2.4: Change in settlement areas (2012-2018) (comparison)



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2.1.2 Accessibility of the border area

This sub-dimension illustrates the functional travel connections that already exist in the border region. It examines average cross-border travel times for different modes of transport and cross-border catchment areas based on mobility flows. It also considers travel times to and from border crossings. The analysis shows whether mobility flows are integrated between border regions or if the border hampers mobility.

2.1.2.1 Comparative quality of selected cross-border connections

Indicator description

The indicator presents a comparative perspective for different modes of transport (public and private) and their average travel speed (so-called space-time-lines). As such it helps to understand and interpret accessibility patterns along the border and highlights the comparative quality of selected cross-border connections.

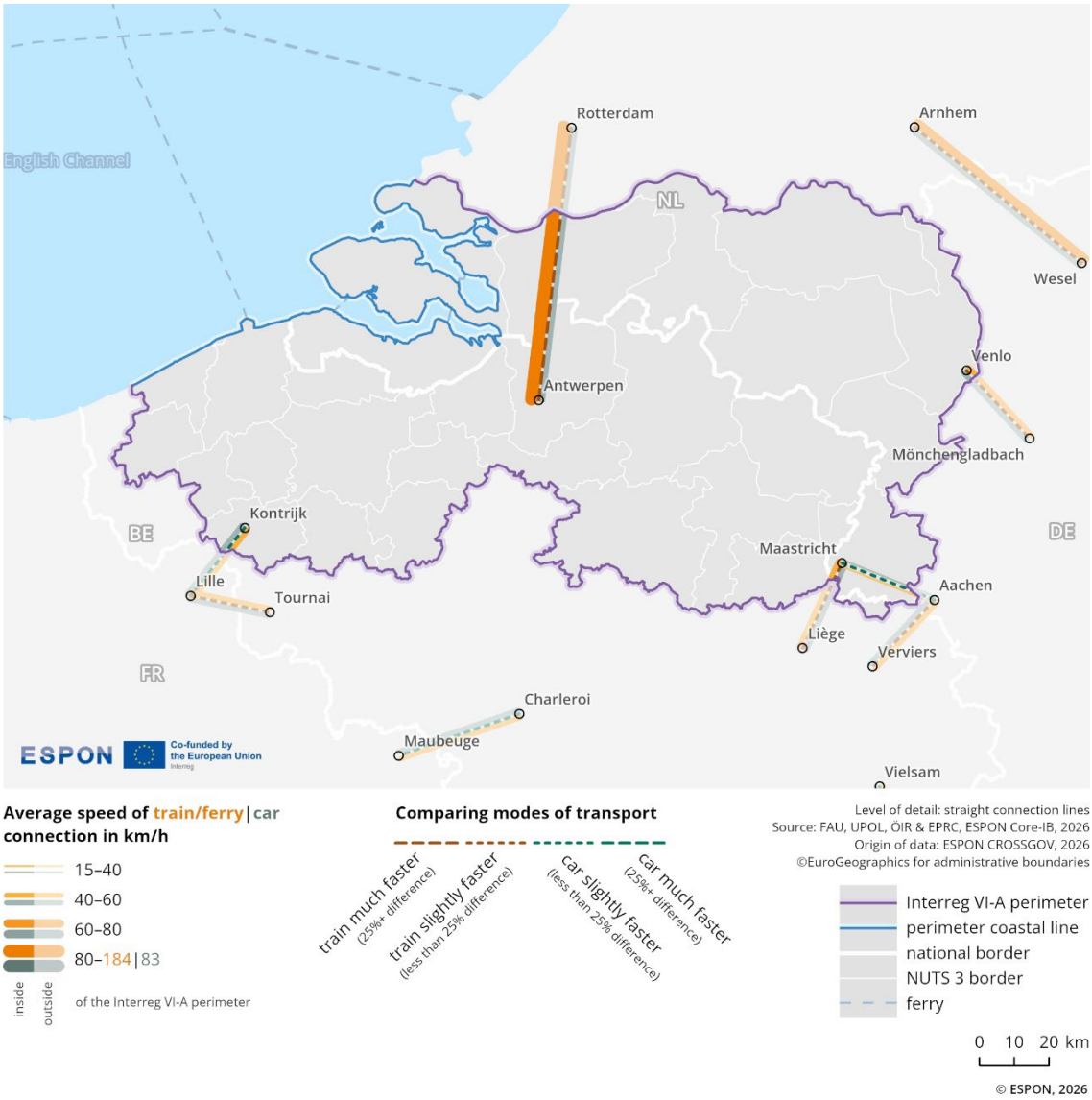
- **Source/method of retrieval**: Average number and speed of rail connections/ferries, average speed of car connections between selected cities and towns in border regions using Rail Travel Sites, Google Maps, luftlinie.org, Direct Ferries, local ferry companies
- **Temporal coverage**: 2025 (first quarter)
- **Unit**: km/h

Please refer to the technical annex for more information.

Cross-border accessibility shapes interactions across borders. Figure 2.5 illustrates this using a "space-time-line" map, which shows parts of a European overview of car and train travel times in the cross-border region. The selection of cities and connections covered is based on a set of criteria applied

throughout Europe within the ESPON CROSSGOV project[5]. These criteria include the presence of a railway station, population size, distance to the border, node hub and functionality. The figure depicts a transport axis connecting Antwerp and Rotterdam via Essen and Roosendaal, showing that the train connection outperforms the car connection in terms of speed. Other transport connections shown on the map illustrate the accessibility of the border region from neighbouring areas in Germany and France (Maastricht-Aachen; Kontrijk-Lille), where car travel is faster than by train.

Figure 2.5: Comparative quality of selected cross-border connections



[5] ESPON CROSSGOV Atlas, see Storymap on 'Space-time-lines': https://gis-portal.espon.eu/arcgis/apps/storymaps/collections/345c978adf784ad-fac30c16b90219d35?item=4

2.1.2.2 Cross-border catchment area based on mobility flows

Indicator description

This indicator measures the movement of people across borders. The density of cross-border movements by Twitter/X users is displayed on a grid cell covering an area of 20x20 km. The indicator does not differentiate between reasons for movement.

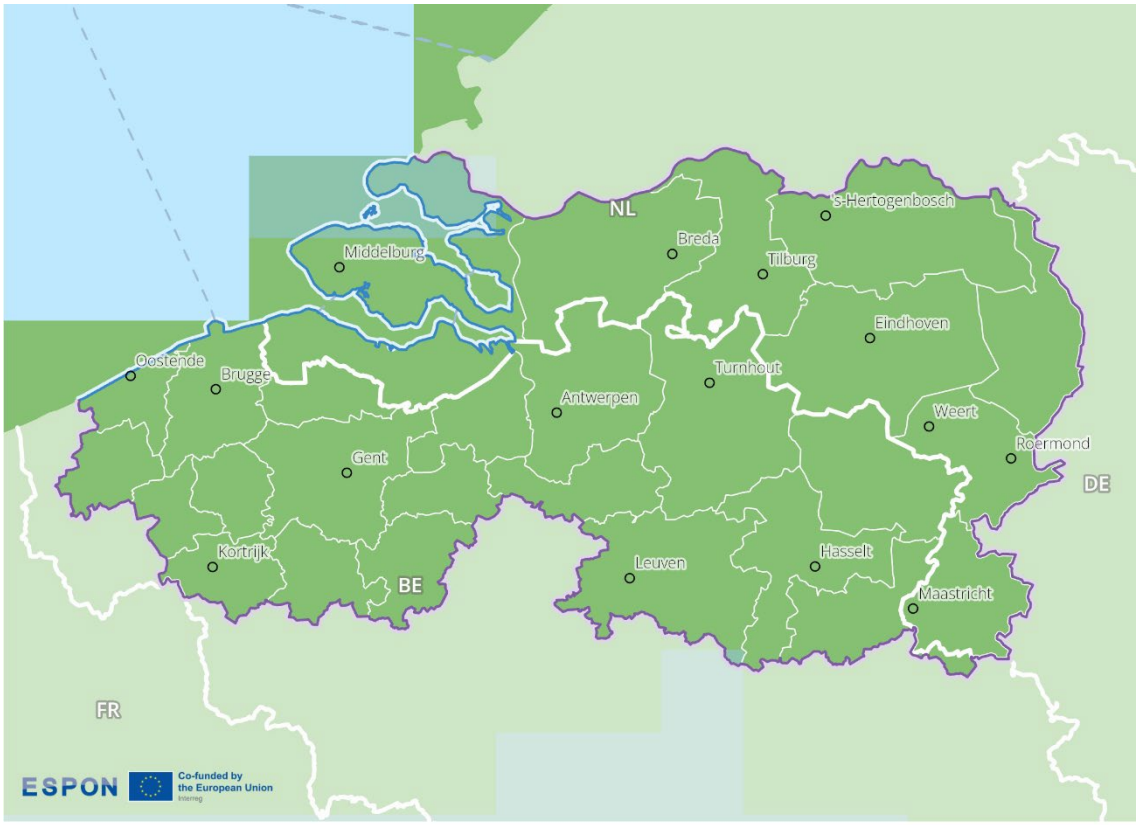
- **Source/method of retrieval**: The indicator is calculated based on Twitter (currently X) data. The digital footprint of individual users provides information about physical mobility flows and is used to calculate cross-border catchment areas of different intensity.
- **Temporal coverage**: 2013-2023
- **Unit**: n/a

Please refer to the technical annex for more information.

Figure 2.6 shows the cross-border catchment area in the border region based on mobility flows from 2013 to 2023, highlighting estimated cross-border mobility intensity across 3 different quartiles. The first quartile represents the 25% highest mobility intensity shown in dark green, the second quartile represents 25-50% coloured in green-blue, and the third quartile represents 50-75% in light blue.

The intensity of cross-border mobility of people within this cross-border region is similar across the programme area. Almost the entire territory records the highest level of mobility intensity. A small area with moderate cross-border mobility intensity is registered in parts of Zeeland (north of Middelburg).

Figure 2.6: Cross-border mobility intensity



2.1.2.3 Cross-border travel-time accessibility

Indicator description

The indicator shows the time it takes to travel from any location within a region to the next border crossing, using grid data and subsequent categorisations into accessibility groups of 30, 60 and 90 minutes. It reflects the accessibility in cross-border areas, considering road transport. The indicator can describe the quality and speed of road connections and thus spatial reach of the cross-border services.

- **Source/method of retrieval**: Based on the OpenStreetMap road network, the travel time to the border is calculated for a grid of the border are. Based on this, areas are calculated within which border crossings can be reached below thresholds of 30, 60 and 90 minutes. As additional visual element, key services pharmacies, doctors, hospitals and shops (retrieved from the ESPON PROFECY project) are displayed and categorised into the accessibility groups.
- **Temporal coverage**: 2025 (first quarter, for accessibility data), 2021 (for service facility data)
- **Unit**: Minutes

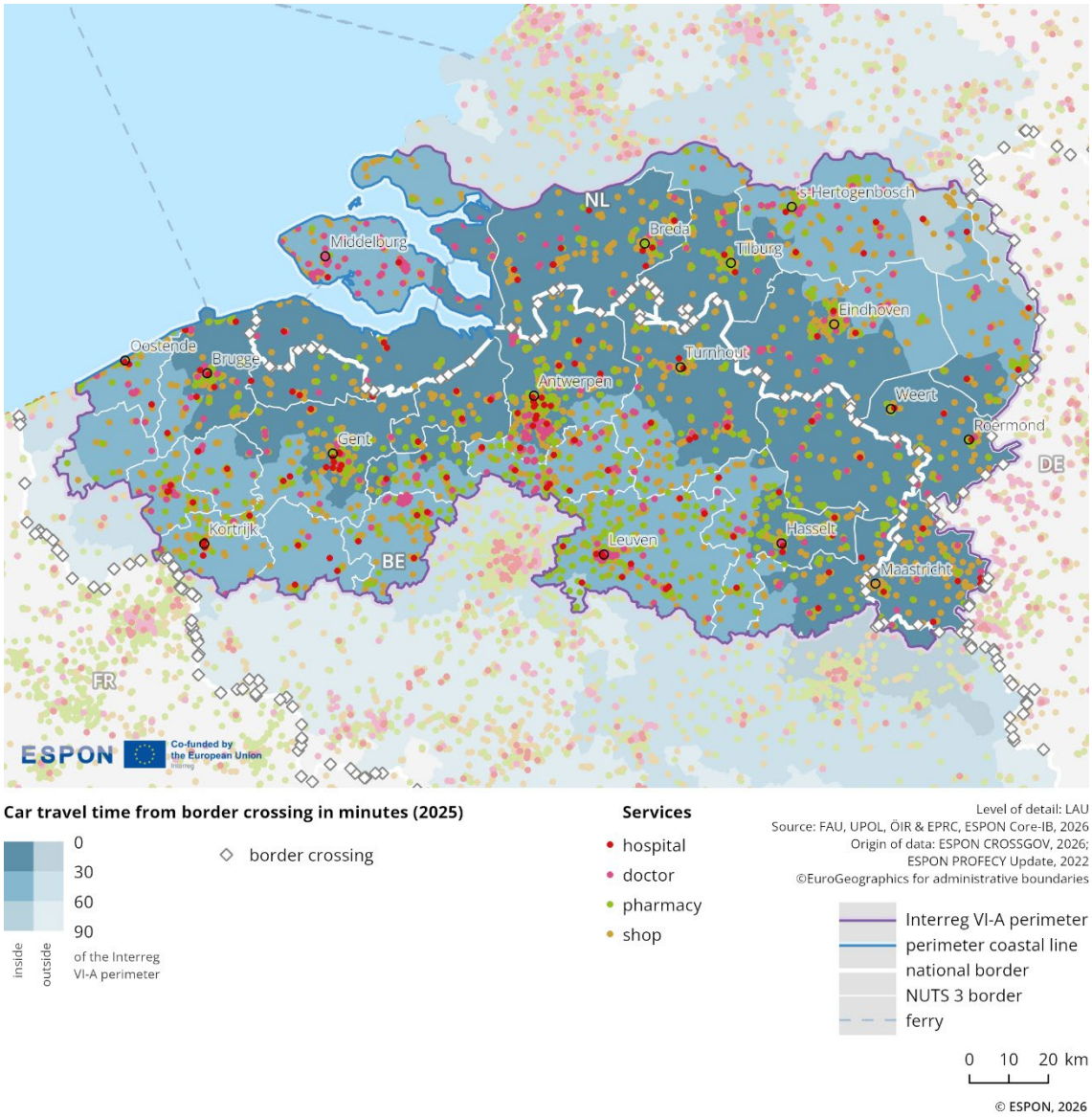
Please refer to the technical annex for more information.

Figure 2.7 illustrates cross-border travel time accessibility in the Interreg area, showing the time distance from the national border in 2025. The legend indicates 3 travel time categories in minutes (30, 60, 90) represented by different shades of blue. In addition, it marks the location of services, including hospitals, doctors (general practitioners), pharmacies, and shops (supermarkets and conventient stores), with distinct coloured symbols.

The map shows a continuous zone of shortest travel times (up to 30 minutes) along both sides of the Belgian–Dutch border, reflecting the close proximity of settlements and the high density of border crossings in this area. This first travel zone extends into the second category, with up to 60 minutes of travel time accessibility. Together, these 2 categories (up to 30- and 60-minutes travel time) encompass nearly the entire territory of the border regions. Only a small area in the north-east of the Dutch side falls within the 90-minute travel time zone.

Services such as shops, hospitals, doctors' cabinets, and pharmacies are distributed fairly evenly, but include several concentrations. The largest concentration of services is in Antwerpen, located within a 30-minute travel time zone from the border. Several other cities with concentration of services, such as Breda, Eindhoven, Brugge, Gent, Hasselt, and Maastricht are also located in the first zone, with travel time accessibility to the border of up to 30 minutes.

Figure 2.7: Travel-time accessibility from border crossings



2.1.3 Key messages on the territorial dimension

This border area is one of the most densely populated cross-border regions in the EU. Population growth in the region is also above the European average (5.5% vs. 1.9%). The working-age population of the area showed a slight increase of 2.3%. At the same time, the population aged 65 and over underwent a substantial increase of 22.2%. This has implications for labour markets and service provision in the future.

High growth in settlement areas is evident on both sides of the border. On the Belgian side, expansion is most visible around urban centres like Antwerpen, Brugge, Gent, and others. On the Dutch side, growth in settlement areas extends across much of the border territory, with no clear distinction between urban cores, and surrounding smaller urban and rural areas. Ongoing settlement growth, particularly in already densely populated areas and/or sensitive environments have implications for future environmental as well and economic development planning.

The highest level of mobility intensity is recorded across almost the entire territory, suggesting collaboration on transport across the border continues to be useful. Services such as shops, hospitals, doctors, and pharmacies are distributed fairly evenly, with several concentrations.

The shared territorial characteristics of the area highlight the potential for cooperation on key issues such as how to balance the ongoing development of densely populated areas with environmental quality and protection.

2.2 Economic dimension

The economic dimension includes analyses of gross domestic product, labour market conditions, competitiveness, and key infrastructure and housing indicators. The aim is to illustrate the impact of the border on economic performance, whether it acts as a barrier or a bridge, and the extent to which integration is supported by labour mobility, remote working, and infrastructure connectivity.

2.2.1 Gross Domestic Product

This sub-dimension illustrates the economic situation of the border region by analysing gross domestic product (GDP). It shows economic development within the border region and how this has changed over time. Comparisons with the respective countries and the EU average provide important context for understanding the region's dynamics.

2.2.1.1 Gross domestic product per capita at current market prices

Indicator description

The indicator shows the regional GDP/capita in current prices and its development over the past years. It highlights structural differences and similarities between the border region and the respective national figures as well as the European average. Furthermore, it highlights patterns within the border region, although has to be interpreted with care in the case of a strong presence of commuters.

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2010-2023
- **Unit**: Euro per capita

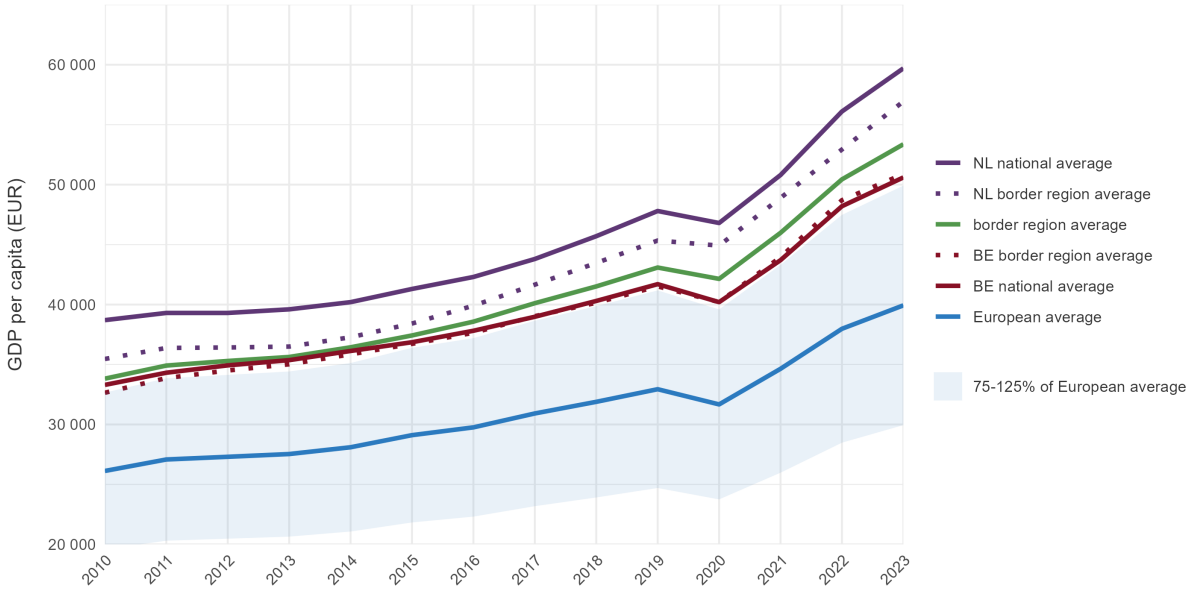
Please refer to the technical annex for more information.

The region recorded a GDP/capita value equivalent to 140.1% of the EU average in 2022 and 142.3% of the average in European border regions in general. The region has a 39.4% increase of GDP per capita in the border region between 2014 and 2022[6], which is 3.7 percentage points higher than the EU average and 4.2 percentage points higher compared to the average of European border regions.

Figure 2.8 illustrates that both the Dutch and the Belgian border regions have an average GDP per capita well above the EU average. When compared to domestic trends, the Belgian border region follows a similar development pattern to the national average, while the Dutch border region remains slightly below the national level.

[6] Percentage changes are calculated using Eurostat data to ensure harmonised statistics from official sources. The latest year for which full coverage of all European regions is available on Eurostat is 2022. For visualisation purposes, ARDECO data has been used to enable longer time series to be visualised by filling the official dataset's existing gaps with model-based estimates. Therefore, slight deviations between the calculation and visualisation are possible.

Figure 2.8: Gross domestic product at current market prices (per capita)



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2.2.2 Labour market and commuting

This sub-dimension highlights the existing and potential functional links within the labour market of the border region. It examines the employment situation and commuting patterns, as well as the role of telework agreements, and considers developments over time based on analysed indicators. The analysis identifies factors that facilitate or hamper cross-border labour market integration.[7]

2.2.2.1 Share of employment

Indicator description

This indicator shows the share of employees in the population aged 15 to 64. Although it does not fully capture entrepreneurs, marginal employees, or civil servants, this is an important statistic for understanding general labour market patterns. It covers 2 aspects: first, high values can result from a high proportion of the resident population being employed. Second, high values can result from a high number of incoming commuters (from other NUTS3 regions within the country or from neighbouring countries). The same arguments apply to low values: they may indicate low levels of employment, or they may result from high shares of outgoing commuters. Values of more than 100% are possible, since the number of incoming commuters can exceed the number of inhabitants aged 15 to 64 (including both domestic and cross-border commuters).

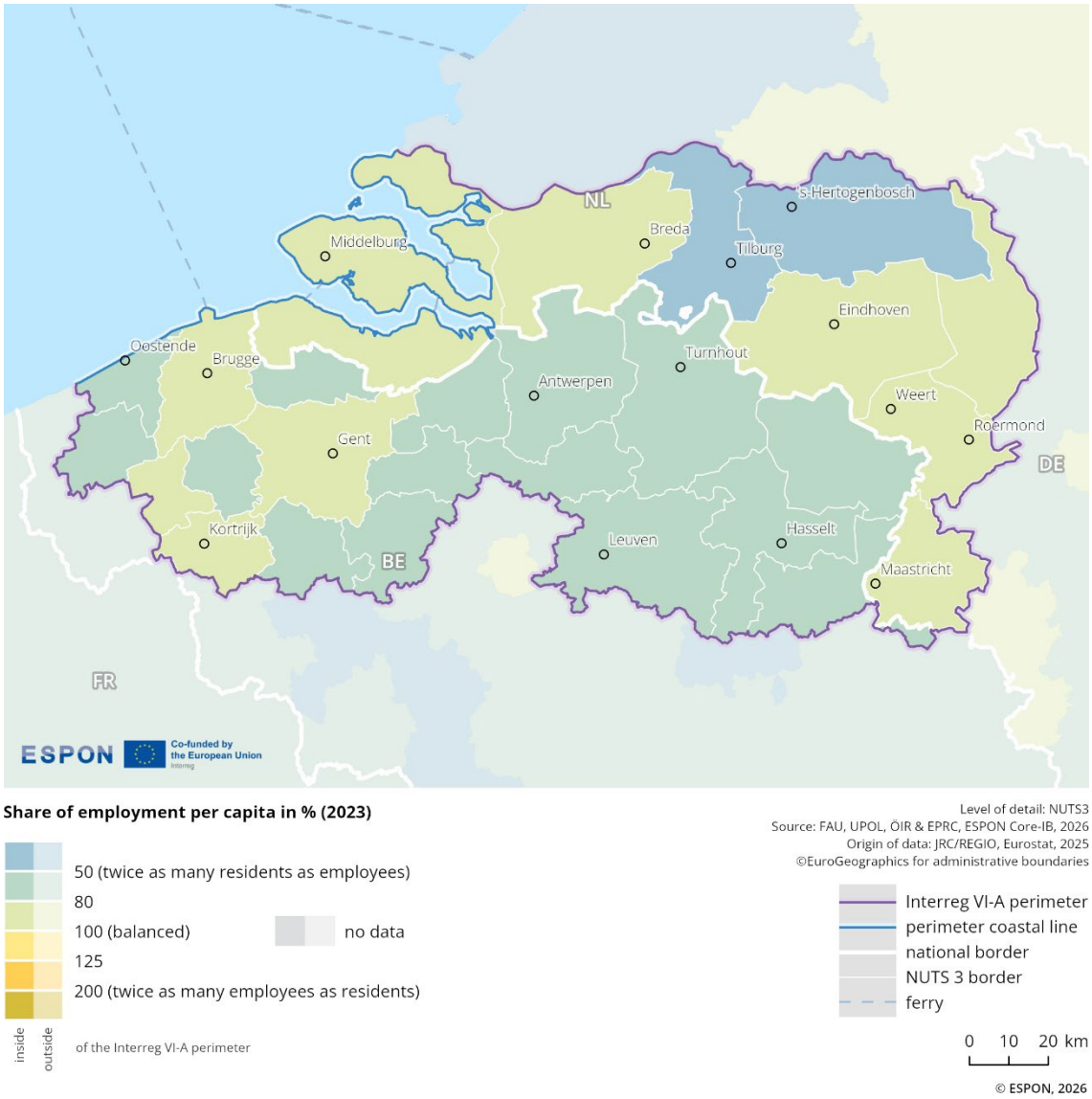
- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Share in %

Please refer to the technical annex for more information.

Figure 2.9 illustrates the share of employment per capita in the population aged 15 to 64 in 2023. The data are categorised into ranges from below 50% (twice as many residents aged 15 to 64 as employees) to above 200% (twice as many employees as residents aged 15 to 64), with 100% representing a balanced ratio. Blue or green-coloured regions indicate more residents aged 15 to 64 than employees, while yellow regions indicate more employees than residents aged 15 to 64.

[7] See also: European Commission 2024: Cross-Border Regional Labour Market Analysis, https://op.europa.eu/s/AazM

Figure 2.9: Employment share[8]



The share of employment in this border region is variable, with the regional average reaching 77.9% in 2023; an increase of 9 percentage points since 2014. Within the programme area, rates vary. On the Dutch side of the programme area, the share of employment varies between twice as much residence as employees (i.e., 50%) and a more balanced share of employment in the remaining areas. On the Belgian side, most of the territory records an employment ratio between 50% to 80%, with a more balanced situation visible in the west, around Gent, Brugge, and Kortrijk.

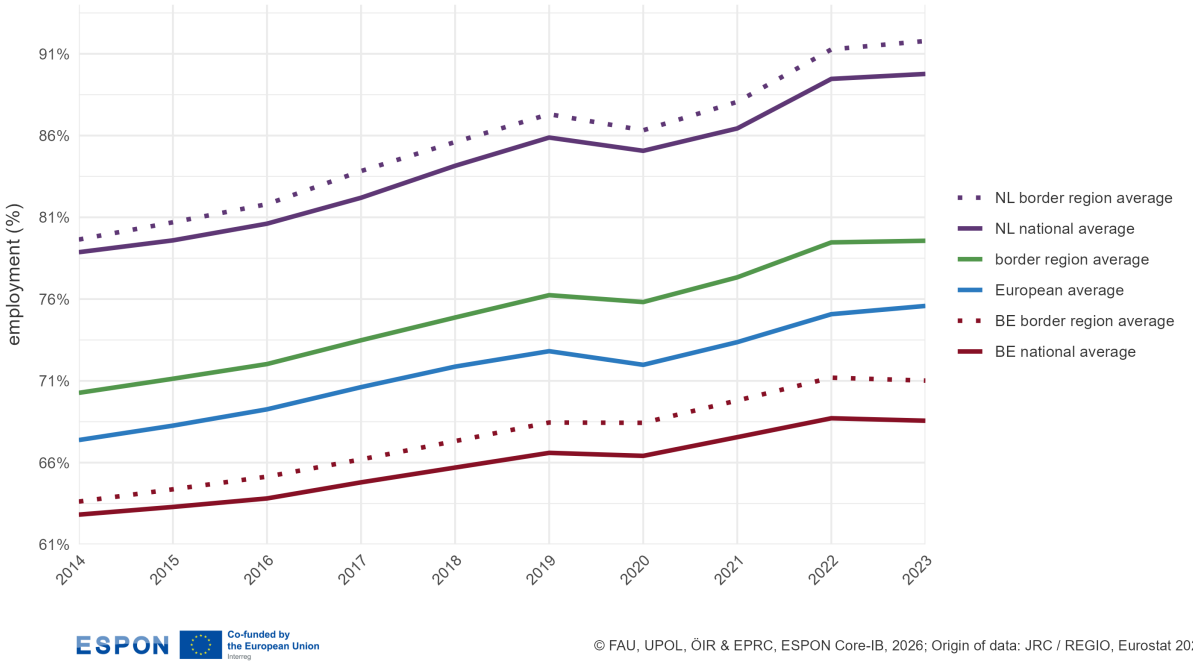
When comparing the share of employment in this border region with different averages, the following can be observed (see Figure 2.10):

- Compared to the European average, values in the cross-border region are higher by 2.3 percentage points; in 2014, the difference was 1.5 percentage points.
- Compared to the national average of Belgium, values in the cross-border region are higher by 9.3 percentage points; in 2014, the difference was 6.1 percentage points.
- Compared to the national average of the Netherlands, values in the cross-border region are lower by 11.9 percentage points; in 2014, the difference was 10 percentage points lower.

[8] Note: In this map, 'residents' refers to the population aged 15 to 64.

- The Belgian border area records values 2.5 percentage points above the Belgian national average, while the Dutch border area is 1.9 percentage points above the Dutch national average.
- Compared to the average of all cross-border regions, this region's share of employment is higher by approximately 3.4 percentage points; in 2014, the difference was 2.6 percentage points higher.

Figure 2.10: Employment share over time (comparison)



ESPON Co-funded by the European Union Interreg

2.2.2.2 Share of working-age population

Indicator description

This indicator shows the share of people aged 15 to 64 in the total population, reflecting the potential working-age population. The population counted includes all residents who live in the country permanently, excluding foreign students and military personnel. Using the 15–64 age range is a standard European statistical proxy, since differences in retirement age or labour participation across countries cannot be captured systematically. It allows for regional differentiation of potential workforce throughout the border region.

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Share in %

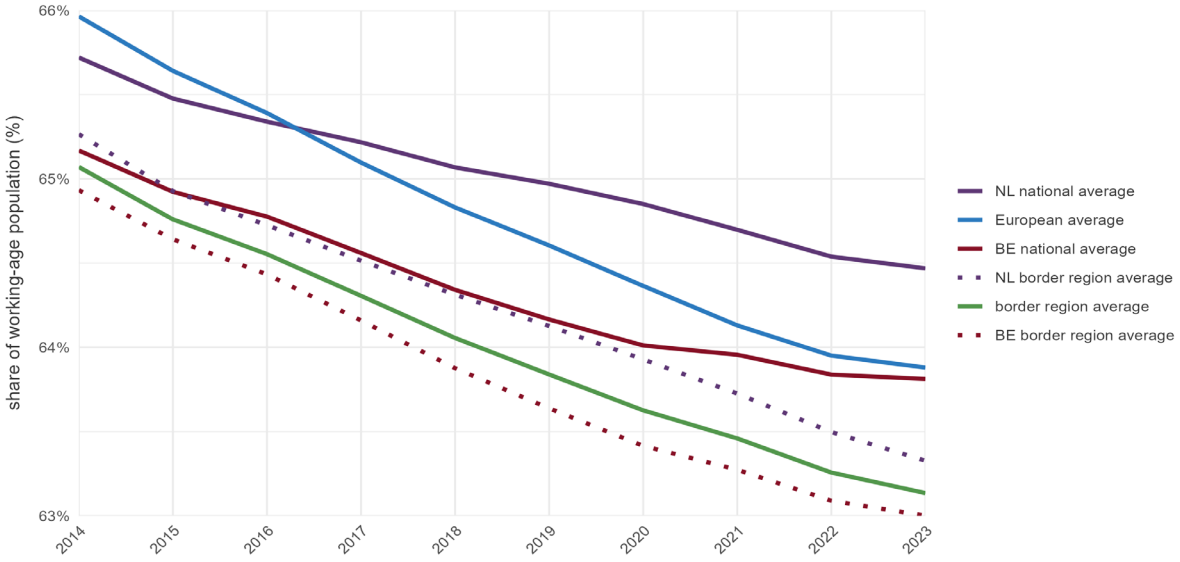
Please refer to the technical annex for more information.

Figure 2.11 illustrates the evolution of the share of the working-age population in the cross-border region between 2014 and 2023. In 2023, the border region shows an average working-age population share of 63.1%, which is slightly below the European average of 63.9% and the average of all cross-border regions (63.7%).

The share of the working-age population in the border region is similar to the Dutch (63.3%) and the Belgian (63.0%) border average. Compared to national averages, the value for the programme area is moderately lower than the Dutch national average (64.5%) and slightly lower than the Belgian national average (63.8%).

The border region experienced a moderate decrease of 2.0 percentage points in the share of the working-age population between 2014 (65.1%) and 2023 (63.1%). This decline is close to the European average, which decreased by 2.1 percentage points during the same period. Both countries recorded a similar downward trend, with the decrease being slightly more pronounced in the Dutch parts (-1.9 percentage points at the border and -1.2 at the national level) compared to the Belgian parts (-1.9 percentage points at the border and -1.4 at the national level).

Figure 2.11: Share of working-age population over time (comparison)



ESPON Co-funded by the European Union Interreg

2.2.2.3 Employment by sector

Indicator description

The indicator differentiates the number of jobs in a region by sector. This indicator focuses on workplace-based employment, providing insight into the employment landscape of a region. The dataset can be disaggregated according to "10-sector" NACE (Nomenclature statistique des activités économiques dans la Communauté européenne) classifications, allowing for detailed analysis of employment distribution across various industries.

- **Source**: Eurostat, Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Share in %

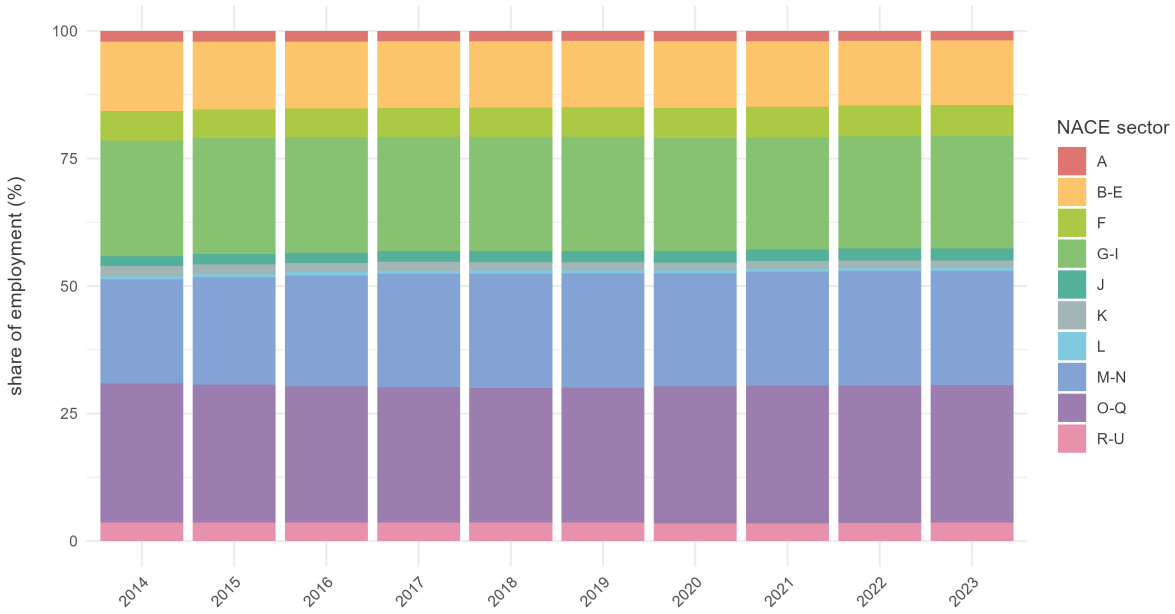
Please refer to the technical annex for more information.

Figure 2.12 illustrates the relative number of jobs in the border area differentiated by sectors. It shows where jobs are located (not where employed persons live). This workplace-based indicator offers insight into the employment structure of a region.

The dataset uses a '10-sector' classification based on NACE categories. The sectoral breakdown is as follows:

- A: Agriculture, forestry and fishing
- B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
- F: Construction
- G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
- J: Information and communication
- K: Financial and insurance activities
- L: Real estate activities
- M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
- O-Q: Education (O), Human health and social work activities (Q)
- R-U: Arts, entertainment and recreation R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

Figure 2.12: Employment by sector (comparison)



A: Agriculture, forestry and fishing
B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
F: Construction
G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
J: Information and communication
K: Financial and insurance activities
L: Real estate activities
M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
O-Q: Education (O), Human health and social work activities (Q)
R-U: Arts, entertainment and recreation (R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

Between 2014 and 2023, the relative number of jobs in the different sectors remains relatively stable. There is a slight decline in the share of employment in mining and quarrying (B), manufacturing (C), electricity, gas, steam and air conditioning supply (D), water supply; sewerage, waste management and remediation activities (E), wholesale and retail trade; repair of motor vehicles and motorcycles (G), transportation and storage (H) and accommodation and food service activities (I). Conversely, there is a modest increase in the number of jobs in professional, scientific and technical activities (M) and administrative and support service activities (N).

Over the entire period, the sectors with the highest share of jobs are ´M-N´ (professional, scientific and technical activities, administrative and support service activities), 'G-I' (wholesale and retail trade; repair of motor vehicles and motorcycles, transportation and storage, accommodation and food service activities) and 'O-Q' (education, human health and social work activities).

2.2.2.4 Outgoing cross-border commuters

Indicator description

The indicator shows outgoing cross-border commuting dynamics at NUTS3 level. Even though no origin-destination information can be provided, it is assumed that commuters primarily travel across the nearest border. Spatial, economic and population arguments are combined to calculate the number of outgoing cross-border commuters.

- **Source/method of retrieval**: Eurostat/LFS data on outgoing commuters currently available on NUTS2 level has been regionalised for NUTS3 by means of weighting by border length, NUTS3 population-weighted centroid distance to border, population per NUTS3 region (15–64 years old) and real compensation per employee
- **Temporal coverage**: 2015-2023
- **Unit**: Share in %

Please refer to the technical annex for more information.

Commuting is one of the most relevant cross-border flows to identify functional linkages. Figure 2.13 illustrates the share of outgoing commuters per capita for each NUTS 3 region (more concretely speaking the share of outgoing commuters among the residential population of the age group 15-64 years old, resembling the potential labour force). Origin-destination information cannot be provided, but the share of outgoing commuters in regions close to the border indicates the relevance of commuting. It highlights functional relations in the labour market within the cross-border region.

Figure 2.13 illustrates the share of cross-border commuters, based on the most recent available year of data. It shows relatively strong cross-border commuting activity in areas directly adjacent to the border on both the Dutch and Belgian sides.

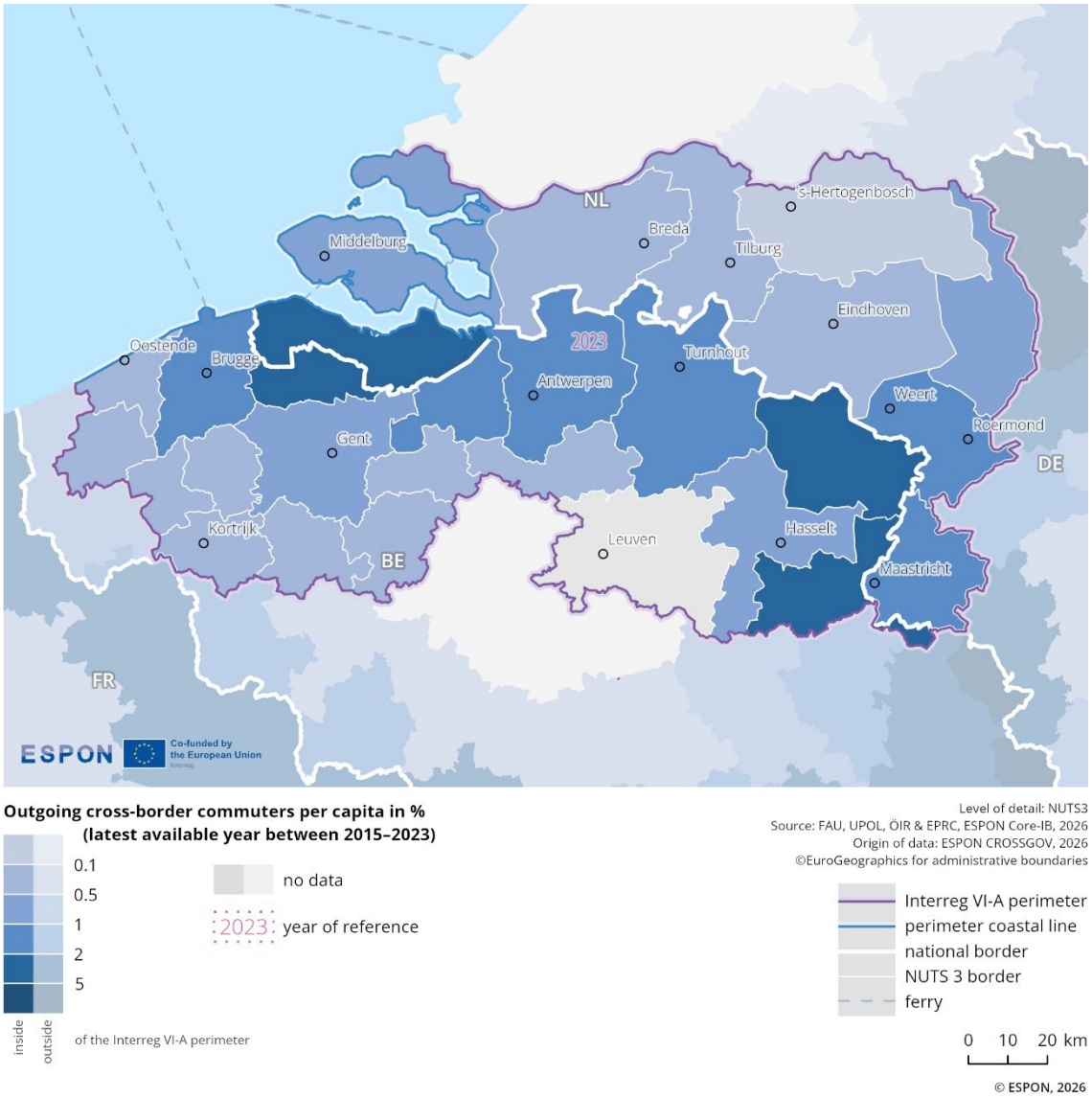
These "outgoing hotspots" are particularly notable: on the Belgian side, the regions of Arr. Eeklo, Arr. Maaseik, and Arr. Tongeren stand out; on the Dutch side, the regions of Zeeuwsch-Vlaanderen, Midden-Limburg, and Zuid-Limburg.[9] These NUTS-3 regions show elevated shares of outgoing cross-border commuters per capita.

Evidence from external studies of commuting patterns in the Dutch and Belgian border areas further suggests that unemployment in their region is a decisive driving force, particularly for low-educated males. At the same time, wage rates in foreign countries and accessibility are significant pull factors.

Further, the analysis of regional cross-border labour markets, showed a high degree of 'symmetry' and integration.

[9] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

Figure 2.13: Outgoing cross-border commuting patterns



2.2.2.5 Cross-border telework agreements

Indicator description

The indicator shows what kind of legal framework for cross-border telework is enacted.

- **Source/method of retrieval**: The indicator is based on information about the legal framework for social security regarding cross-border teleworking, categorised by border pair.
- **Temporal coverage**: Status as of March 2025
- **Unit**: n/a

Please refer to the technical annex for more information.

The 2 countries involved in the programme are signatories of the 2023 Framework Agreement on Cross-Border Telework. Under this agreement, cross-border workers can telework from their country of residence for up to 50% of their total working time without affecting their social security affiliation.

2.2.3 Competitiveness

This sub-dimension illustrates the competitiveness of the border region by analysing the main industry sectors that contribute to its economic development. It assesses gross value added (GVA) at basic prices by sector, as well as nominal compensation per hour worked, in order to understand productivity levels and sectoral strengths.

2.2.3.1 Gross value added at basic prices by sector

Indicator description

The indicator shows the gross value added (GVA), which is a measure of the contribution of a country or region to the economy. Regional GVA represents the value generated by all units involved in the production of goods and services within a specific area. This indicator can be disaggregated by industry and service sector, allowing for a detailed analysis of economic contributions across different fields. Additionally, the sum of GVA across all industries or sectors, combined with taxes on products and minus subsidies on products, yields the gross domestic product (GDP) of the region. The dataset is available in "10-sector" NACE classifications, facilitating comprehensive evaluations of the regional economy.

- **Source**: Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2014-2023
- **Unit**: Million purchasing power standards (PPS)

Please refer to the technical annex for more information.

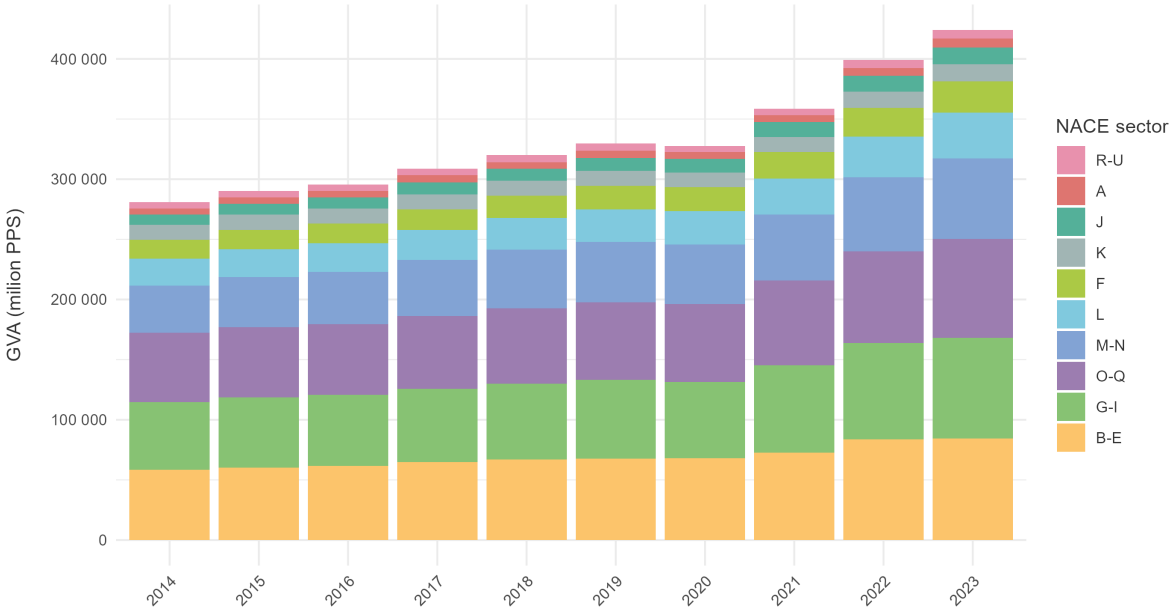
Figure 2.14 visualises gross value added (GVA), which is an important indicator of economic activity. GVA measures the value created by all economic activities involved in producing goods and services in a specific area. It is differentiated by sectors to provide detailed insights into the economic contributions of different fields.

The dataset uses a '10-sector' classification based on NACE categories. The sectoral breakdown is as follows:

- A: Agriculture, forestry and fishing
- B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
- F: Construction
- G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
- J: Information and communication
- K: Financial and insurance activities
- L: Real estate activities
- M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
- O-Q: Education (O), Human health and social work activities (Q)
- R-U: Arts, entertainment and recreation R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

Between 2014 and 2023, the GVA in this cross-border area increased by 51%, rising from 280,885 million purchasing power standards (PPS) to 423,983 million PPS. Sector groups B–E, G–I, and O–Q together make up over half of the total GVA, highlighting their significant contribution to the regional economy within the border area. The sector groups B–E contributed the largest share, with a total of 75,457 million PPS in 2023. This underlines the significance of sectors such as mining and quarrying (B), manufacturing (C), electricity, gas, steam and air conditioning supply (D), water supply; sewerage, waste management and remediation activities (E).

Figure 2.14: Gross value added at basic prices by sector (comparison)



A: Agriculture, forestry and fishing
B-E: Mining and quarrying (B), Manufacturing (C), Electricity, gas, steam and air conditioning supply (D), Water supply; sewerage, waste management and remediation activities (E)
F: Construction
G-I: Wholesale and retail trade; repair of motor vehicles and motorcycles (G), Transportation and storage (H), Accommodation and food service activities (I)
J: Information and communication
K: Financial and insurance activities
L: Real estate activities
M-N: Professional, scientific and technical activities (M), Administrative and support service activities (N)
O-Q: Education (O), Human health and social work activities (Q)
R-U: Arts, entertainment and recreation (R), Other service activities (S), Activities of households as employers; undifferentiated goods- and services-producing activities of households for own use (T), Activities of extraterritorial organisations and bodies (U)

2.2.3.2 Nominal compensation per hour worked

Indicator description

The indicator shows the average income paid for each hour worked, known as compensation per hour worked. This measure is calculated by dividing the "compensation of employees at current prices" by the total number of "hours worked (employees)." Employees, in this context, are defined as individuals engaged by contract in productive activities for a resident unit, receiving remuneration irrespective of their place of residence. The total hours worked is considered the most appropriate measure of labour input, representing the aggregate number of hours actually worked by employees. This indicator provides valuable insights into labour productivity and wage dynamics within the economy.

- **Source**: Annual Regional Database of the European Commission (ARDECO)
- **Temporal coverage**: 2023 (missing data from 2023 in Switzerland were supplemented by values from 2022)
- **Unit**: Euro

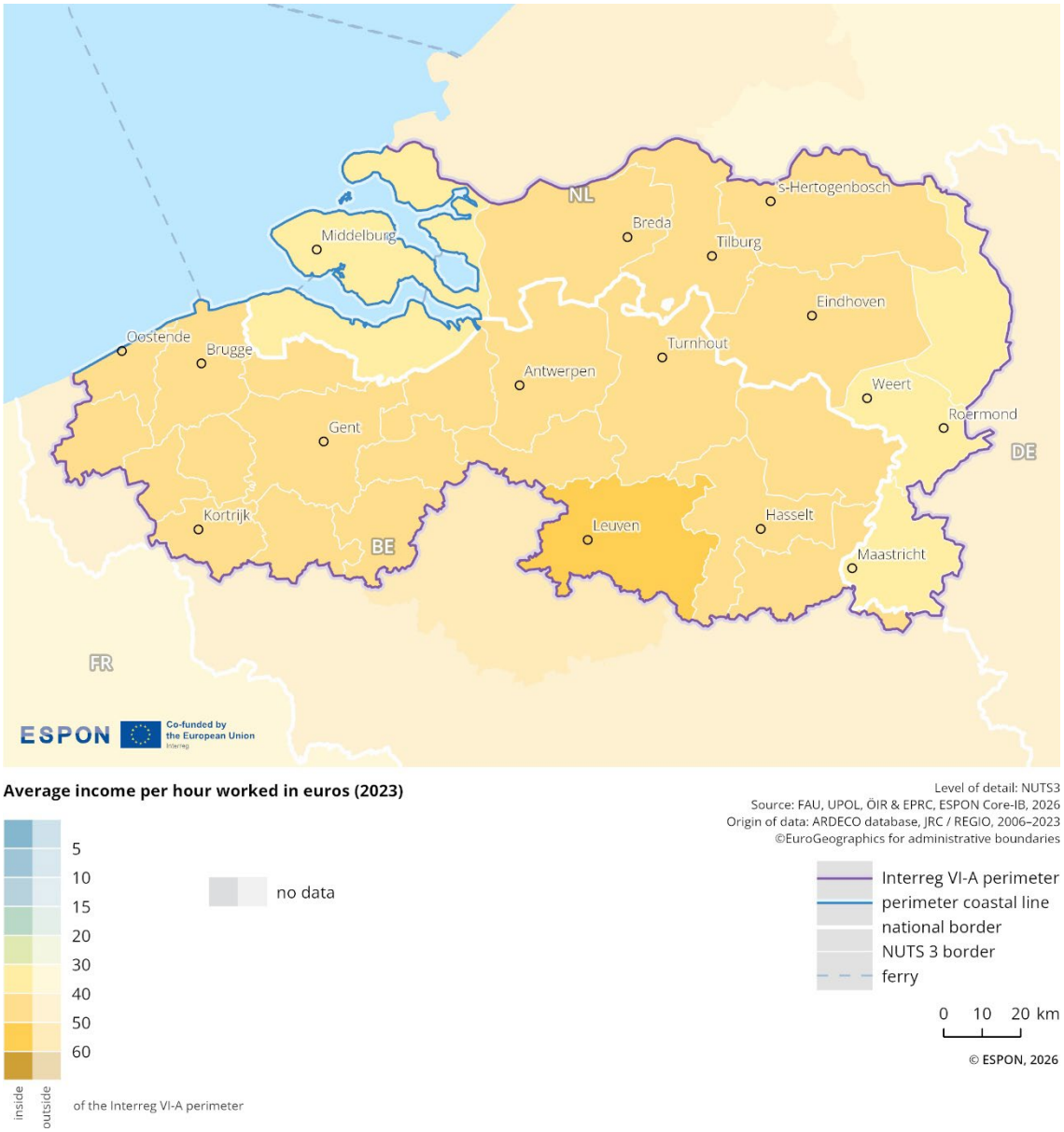
Please refer to the technical annex for more information.

Figure 2.15 shows the average values for the 'compensation per hour worked'. This indicator is calculated by dividing the total compensation of employees (at current prices) by the total number of hours worked by those employees. In this context, 'employees' are defined as individuals engaged by contract in productive activities. The data is available for the place of work, regardless of the place of residence. Total hours worked represent the actual number of hours worked by employees and are considered the most accurate measure of labour input.

In 2023, nominal compensation per hour worked in this cross-border region was quite evenly distributed. On the Dutch side, most areas reported average hourly incomes between €30 and €50.[10] The Dutch national average stood at €42.20. On the Flemish side, average hourly incomes generally ranged between €40 and €50. Arr. Leuven (€53.80) recorded one the highest values standing out in particular. The Belgian national average for 2023 was € 44.50. It must be noted that higher nominal labour costs in Belgium may reflect structural factors rather than higher net wages, so their implications for cross-border labour flows should be interpreted with caution. Within this context, wage differentials across the border can still influence mobility patterns, with potential effects on workforce availability, regional competitiveness, and cross-border labour market dynamics.

[10] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

Figure 2.15: Average income per hour



2.2.4 Infrastructure and housing

This sub-dimension shows the impact of the border on infrastructure and housing in the region. It assesses housing prices and average internet speed in order to identify cross-border effects, including potential price spillovers and disparities. The analysis reveals whether infrastructure and housing markets facilitate integration or expose structural challenges that are specific to the border area.

2.2.4.1 Advertised sales prices

Indicator description

The indicator shows the advertised sales price per square meter for houses/appartements as retrieved from commercial real estate websites at national level. In the cross-border region, local differences between average sales prices are highlighted and the "cutting" effect of the border and its influence on price levels is visualised.

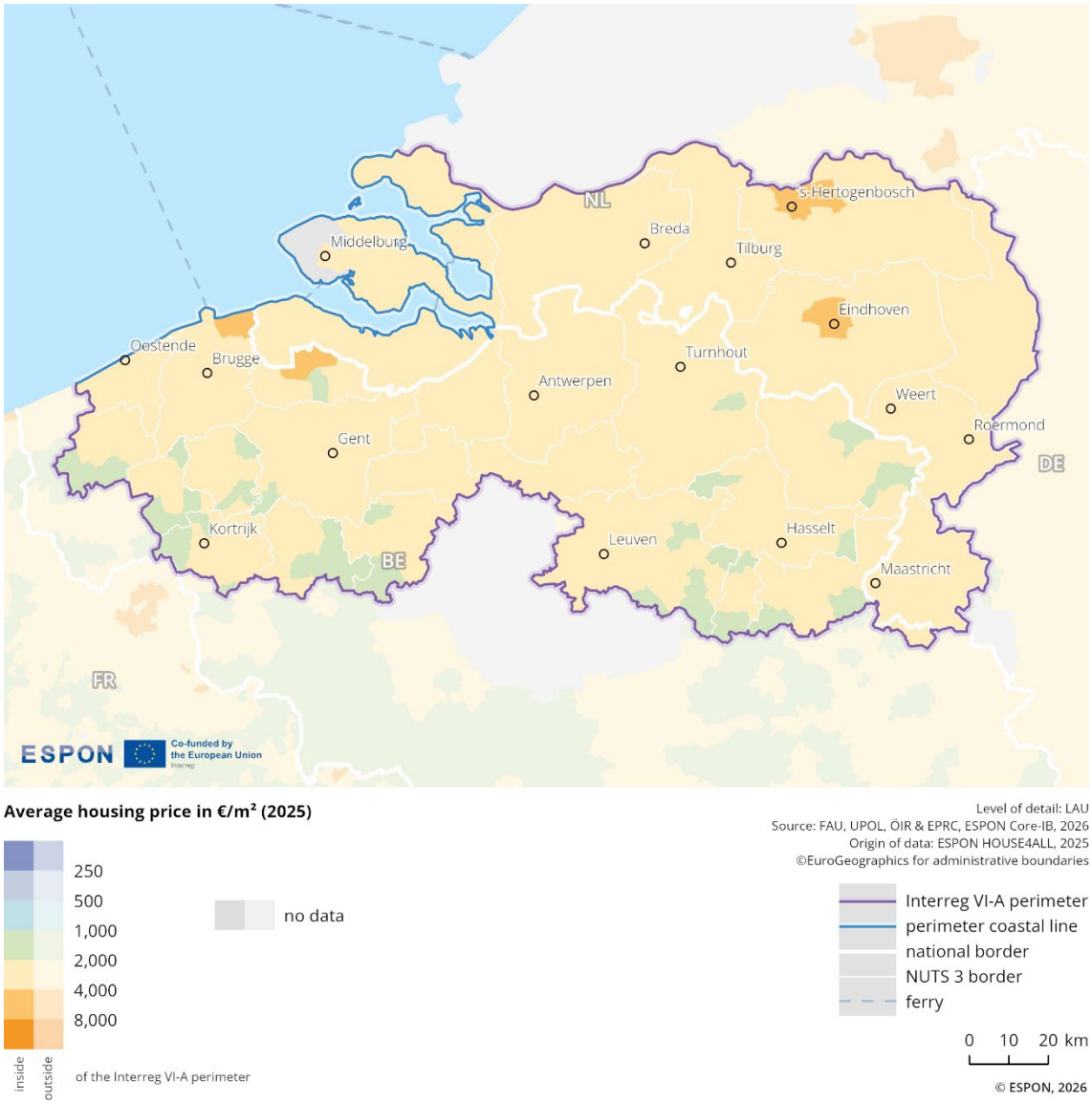
- **Source/method of retrieval**: Processed ESPON House4all data. The original data is collected via web-scraping of national listing websites over a one-year period.
- **Temporal coverage**: 2024/2025
- **Unit**: Average price per square meter (€/m^2)

Please refer to the technical annex for more information.

Figure 2.16 illustrates the advertised sales price of housing in 2025 across the border region. The data are categorised into ranges of average housing price per square metre, from below 250 €/m² up to more than 8,000 €/m², shown in colours ranging from purple and blue to green, yellow and orange.

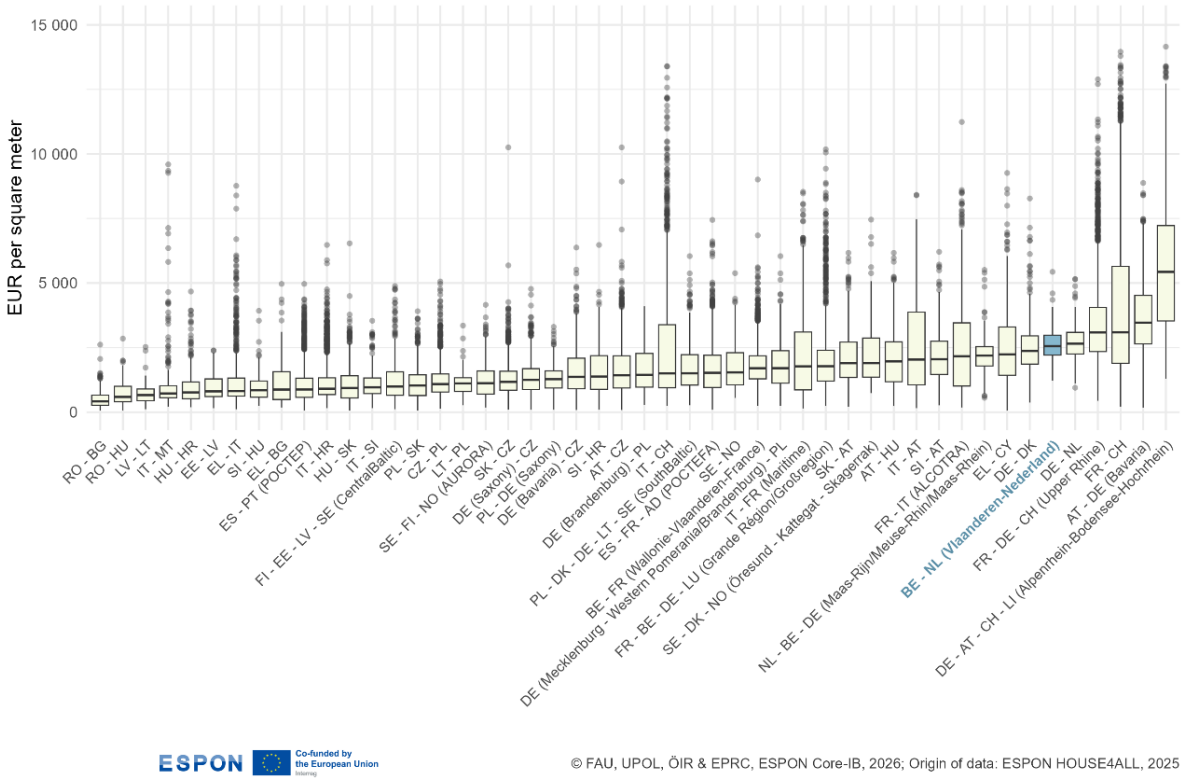
The map indicates that prices are overall balanced on both sides of the border, with most areas falling within the 2,000 to 4,000 €/m² category. Higher price categories with prices up to 8,000 €/m² are observed in the cities of Eindhoven and Hertogenbosch (Netherlands), as well as on the north Belgian coast and east of Brugge. Several dispersed areas located in the southern part of the border region, on the Belgian side, fall into the lower category, with prices ranging from 1,000 to 2,000 €/m².

Figure 2.16: Advertised housing prices



When comparing the average advertised sales prices on both sides of the border, the data indicate certain difference. Overall, the Belgian side of the border region records an average advertised sales price of around 2,421 €/m², while the Dutch side shows a higher average of approximately 3,085€/m². When compared with the average for all EU border regions (€1,900/m²), this cross-border area ranks among those with the highest average advertised sales prices (€2,576/m²), although still below the overall European average of 5,600 €/m².

Figure 2.17: Advertised housing prices (comparison)



2.2.4.2 Average internet speed

Indicator description

The indicator shows the population weighted average internet speed available at municipal level. It highlights differences in the "digital preparedness". In border regions, this indicator is particularly relevant for identifying digital infrastructure gaps that may hamper balanced development and cross-border integration.

- **Source/method of retrieval**: Processing of data provided by Speedtest by Ookla Global Fixed and Mobile Network Performance Maps, based on Ookla's analysis of Speedtest Intelligence data.
- **Temporal coverage**: 2022
- **Unit**: Download speed in Mbps

Please refer to the technical annex for more information.

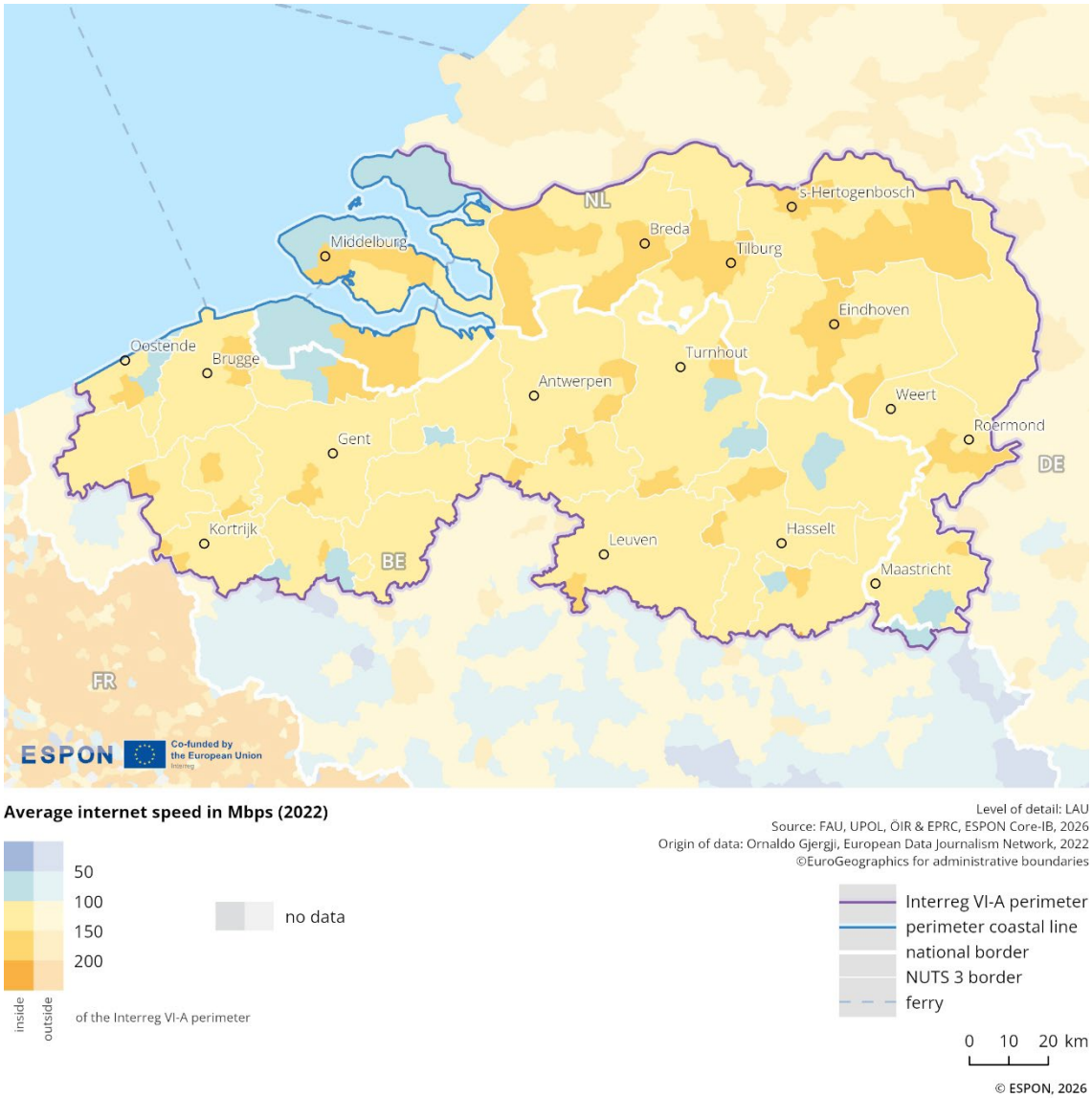
Digitalisation is a highly relevant issue in European border regions, with the overarching objective of ensuring appropriate digital access. It is widely recognised as a key precondition for successful regional and economic development. A major challenge in this process is preventing 'digital divides', i.e., avoiding significant disparities in economic, social and spatial terms.

Average internet speed is a telling indicator of such disparities, highlighting differences in 'digital preparedness' at the local level. Figure 2.18 shows the average download speed at the municipality level. The colour scheme ranges from dark blue (very slow speeds) to orange (very fast speeds). The data,

prepared by OBC Transeuropa for EDJNet, is based on Speedtest Intelligence data from Speedtest/Ookla's Global Fixed and Mobile Network Performance Maps for the first quarter of 2022. The average download speeds are expressed in megabits per second (Mbps), not to be confused with megabytes per second (MBps).

In general, the border region has relatively consistent and high levels of internet speed with some exceptions. Values range from 50 Mbps to 200 Mbps. In particular, the core urban areas of Eindhoven, Tilburg, Breda, and Middelburg, together with areas in the surroundings of Brugge, Gent, Antwerpen, Hasselt, and Roermond record high average speed (between 150 Mbps and 200 Mbps). In contrast, Dutch coastal areas, including west, north and south of Middelburg, and some dispersed areas on the Belgian side experience comparatively lower average internet speed.

Figure 2.18: Average internet download speed



2.2.5 Key messages on the economic dimension

Both sides of the border region demonstrate strong and broadly comparable economic performance, with GDP per capita above the EU average. Yet, employment levels vary both between and within the 2 sides of the border. Overall, the Dutch border region records higher employment rates than the Belgian side, and in both countries, border regions perform above their respective national averages. However, the lowest are recorded in the Dutch part (areas in Midden-Brabant and Noordoost-Brabant).

The programme area has experienced a moderate decrease in the share of working-age population between 2014 and 2023. In 2023, nominal compensation per hour was unevenly distributed, with higher rates in the Belgian territories. There is relatively strong cross-border commuting activity in areas directly adjacent to the border. Also, the 2 countries involved in the programme are signatories of the 2023 Framework Agreement on Cross-Border Telework. Developing cross-border links to support ongoing and future development of cross-border work to the benefit of the wider area remains an important consideration. The relative number of jobs available in the different sectors has remained relatively stable. Sector groups B–E (incl. mining and quarrying, manufacturing, electricity, gas, steam and air conditioning supply, water, sewerage, waste management), G–I (incl. wholesale and retail trade; repair of motor vehicles, transportation and storage, accommodation and food service activities), and O–Q (incl. education, human health and social work) together make up over half of the total GVA of the area. The shared sectoral strengths and importance of professional and scientific sectors underline the value of educational and research links.

Housing prices are relatively balanced in both countries, with most areas falling within the 2,000 to 4,000 €/m² category. Higher categories with prices up to 8,000 €/m² are found in and around the cities of Brugge. In general, the border areas in the Netherlands and Belgium, except for the coastal regions, show relatively high levels of internet speed.

2.3 Green dimension

The green dimension highlights the environmental characteristics, vulnerabilities and sustainability-related interactions within the border region. The analysis provides insight into the environmental interdependence of border regions. Additionally, the spatial distribution of renewable and conventional energy infrastructure, alongside indicators of resources and the circular economy, reveals whether the border facilitates collaborative transitions towards sustainability.

2.3.1 Nature protection and pollution

This sub-dimension investigates cross-border functional links in protected areas and areas affected by air and water pollution. It analyses the presence of protected areas in order to identify cross-border ecological links and conservation efforts. It also highlights the extent to which air and water pollution affects people living in border regions.

2.3.1.1 Protected areas

Indicator description

The indicator shows the presence and territorial coverage of protected areas based on the combination of 3 data sources, i.e., Nationally designated areas, Natura 2000 Network and Emerald Network.

- **Source/method of retrieval**: The indicator represents a combination of nationally designated areas, Natura 2000 and Emerald network provided by EEA (European Environment Agency) Geospatial data catalogue.
- **Temporal coverage**: 2024
- **Unit**: n/a

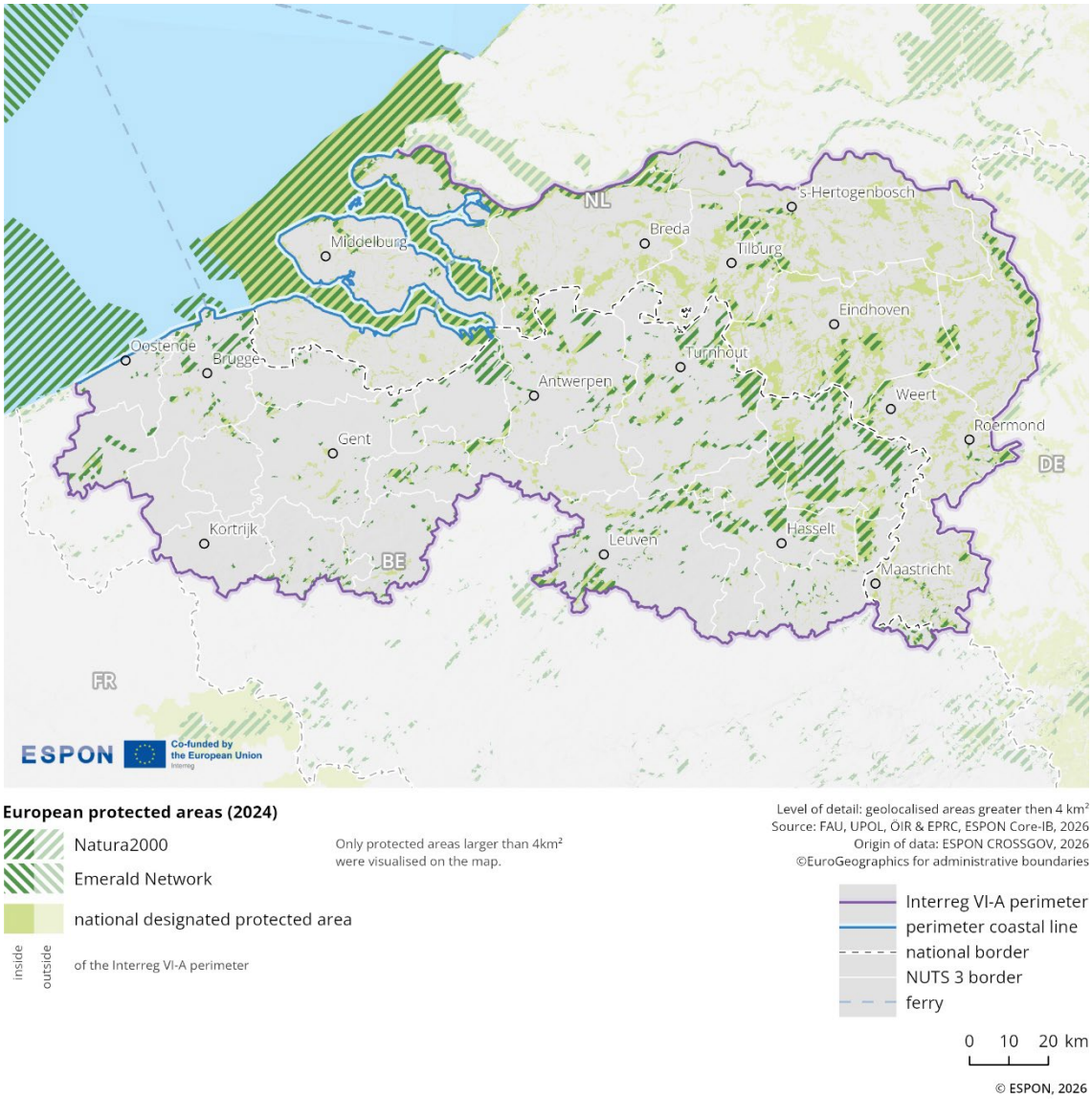
Please refer to the technical annex for more information.

Figure 2.19 illustrates the distribution of protected areas in 2024 across the border region. The data differentiate between Natura 2000 sites, the Emerald Network, and nationally designated protected areas, with only protected areas larger than 4 km² displayed.

The map shows that protected areas are concentrated on the east part, between Hasselt in Belgium and Eindhoven in the Netherlands, and around the coast, where Natura 2000 and nationally designated protection over water areas often overlap. More central parts of the border region, in particular Turnhout and the surroundings of Tilburg, contain more scattered protected areas, while southwestern areas near Gent show lower overall coverage.

The map displays cross-border continuity in several protected areas including the water zones extending from Zeeland down to the Port of Antwerp, and in the eastern part of the border region between Hasselt, Weert and Eindhoven.

Figure 2.19: Nature protected areas



2.3.1.2 Air pollution

Indicator description

The indicator shows the air pollution from fine particulates (PM2.5) at NUTS3 level. The data shows the population-weighted average air pollution level (µg/m³), providing an indication of the extent to which the regional population is affected by air pollution.

- **Source/method of retrieval**: Processing and analysis of European Environment Agency data
- **Temporal coverage**: 2022
- **Unit**: Population weighted average of µg/m³

Please refer to the technical annex for more information.

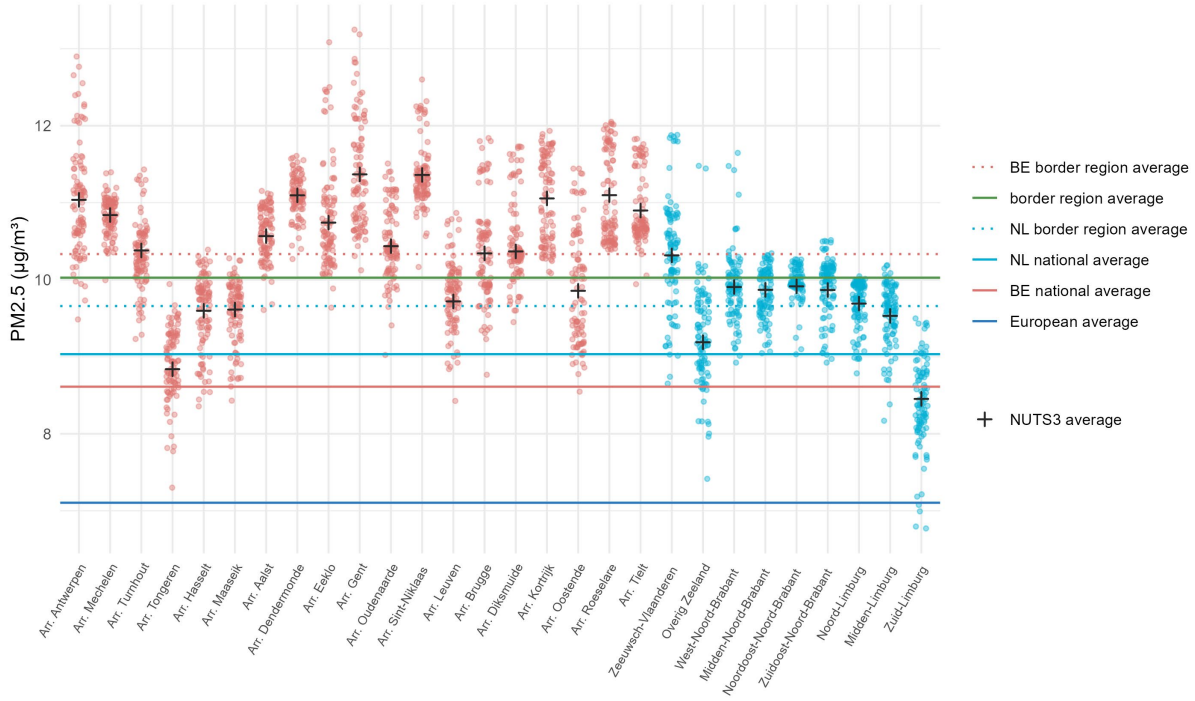
Figure 2.20 illustrates PM2.5 concentrations (in µg/m³) across the NUTS3 regions of the border region. Each small dot represents an individual measurement, while the black crosses indicate the average PM2.5 concentration for each NUTS3 region.[11] The regions are aligned along the x-axis, with Belgian regions on the left (in red) and Dutch regions on the right (in blue).

PM2.5 values in both countries span a wide range. Overall, Belgian regions show higher individual peaks in PM2.5 concentrations than Dutch regions. Dutch NUTS3 averages cluster below 10 µg/m³ with only few measurements exceeding 10 µg/m³. Belgian NUTS3 averages display more variety, and several exceed 10 µg/m³.

Belgium's national average is around 8.5 µg/m³, with the border region average significantly higher. A similar pattern can be observed in the Dutch data, where the national average is significantly lower than the border region average.

The European average is around 7 µg/m³, which is lower than both the Belgian and Dutch values. The cross-border average is slightly above 10 µg/m³, making it significantly higher than the European and national averages. This cross-border average reflects the higher values in the Belgian border region and the lower values in the Dutch border region.

Figure 2.20: Air pollution



[11] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

2.3.1.3 Water pollution

Indicator description

The indicator shows the ecological status or potential for coastal and river water bodies. It is based on an assessment of biological, hydro-morphological, chemical and physico-chemical quality elements.

- **Source/method of retrieval**: Processing and analysis of European Environment Agency data
- **Temporal coverage**: 2022 (supplemented by 2016 data)
- **Unit**: n/a

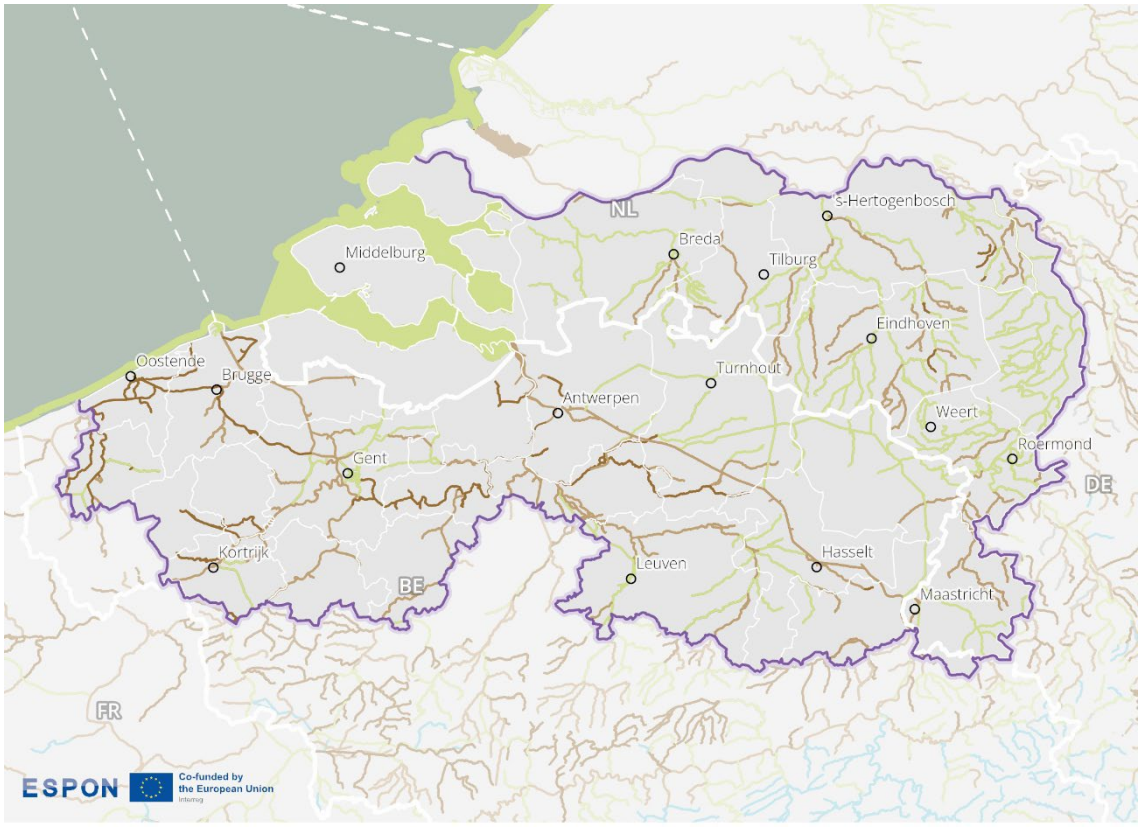
Please refer to the technical annex for more information.

Figure 2.21 illustrates water pollution levels in the border region in 2022. Water quality is represented using 6 colour-coded categories, ranging from "bad" to "high", including an "unknown" category.[12]

In general, on both sides of the border the water quality of river bodies is assessed as 'poor' or 'bad", especially around the larger cities. As several water bodies extend across the border, the data point to a shared challenge in maintaining water quality. A dense network of river bodies, located on the east side of the Dutch border area are classified as 'moderate", as well as the coastal waters on the west.

[12] For more information see the Water Framework Directive Reporting Guidance (2022): https://cdr.eionet.europa.eu/help/WFD/WFD_715_2022

Figure 2.21: Water quality patterns



Water quality (2022*)

- high
- good
- moderate
- poor
- bad
- unknown

inside outside inside outside of the Interreg VI-A perimeter

Level of detail: geolocalised lines and areas
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: © European Environment Agency, 2025
©EuroGeographics for administrative boundaries

- Interreg VI-A perimeter
- national border
- NUTS 3 border
- ferry

0 10 20 km

© ESPON, 2026

2.3.2 Climate risks and resilience

This sub-dimension examines cross-border functional links relating to climate risks and resilience. It analyses exposure to natural hazards such as landslides, earthquakes, droughts and floods in order to identify vulnerabilities and risks.

2.3.2.1 Natural hazard risks

Indicator description

The indicator shows the risk the border region is facing in relation to natural hazards (floods, droughts, landslides and earthquakes). The map highlights potential cross-border affectedness and allows to judge the relative relevance of each risk for the cross-border region.

- **Source/method of retrieval**: The indicator is based on geodata from the Disaster Management Risk Knowledge Centre/JRC. It provides the likelihood of specific natural hazard events at grid level.
- **Temporal coverage**: 2024
- **Unit**: n/a

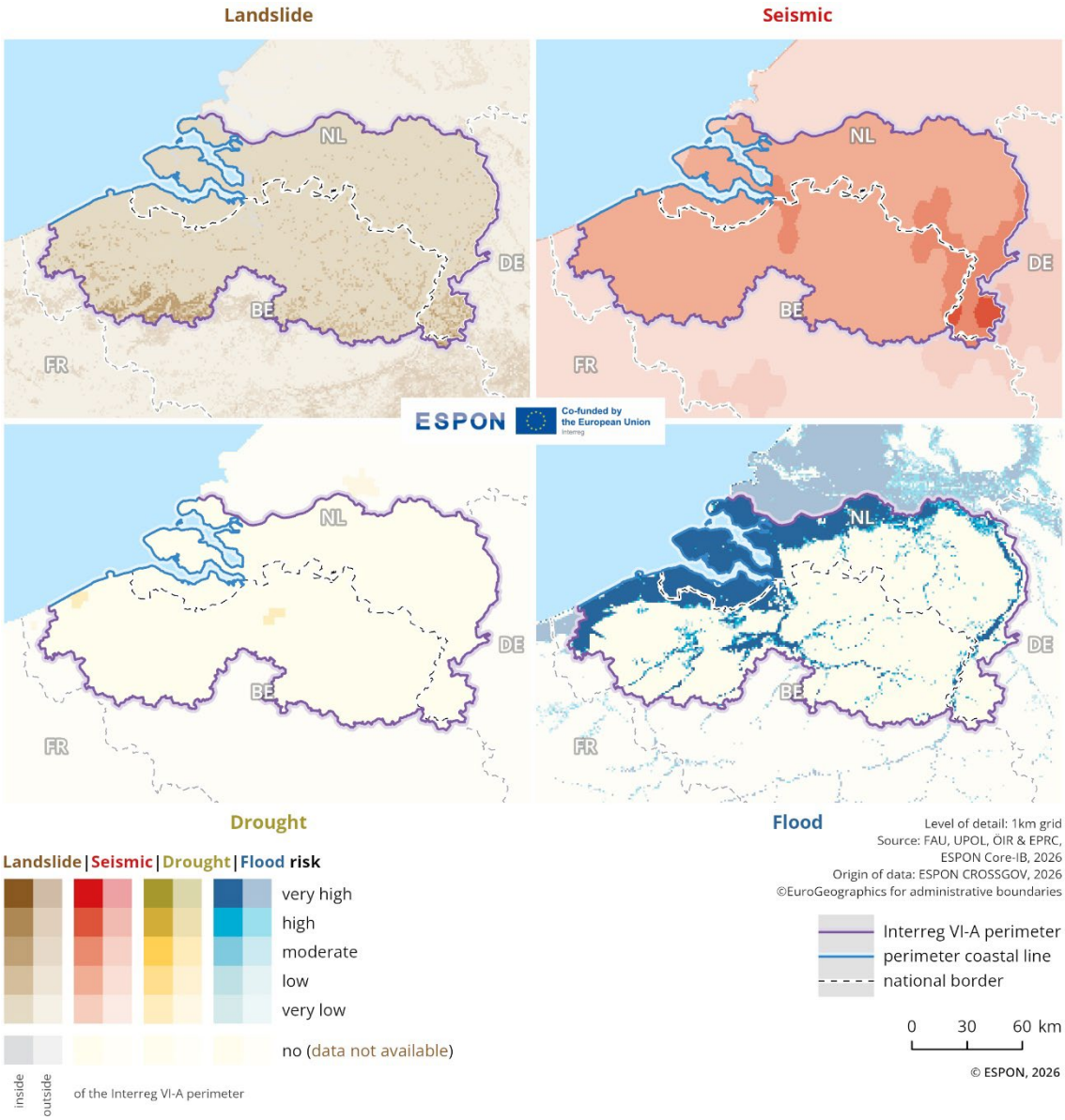
Please refer to the technical annex for more information.

Figure 2.22 illustrates the spatial distribution of natural hazards in the cross-border region, highlighting areas where risks are shared across national boundaries and where risks are not necessarily cross-border relevant.

Flood risks are widespread across the border region. The North Sea poses a very high risk for almost the entire region of Zealand (NL) as well as the Belgian coastal areas. The Rhine delta is associated with the high flood risk in the northern Dutch part of the border region. Further flood risks stem from the Scheldt and the Meuse River that runs through both Belgium and the Netherlands.

Seismic activities are (very) low, except for the eastern-most parts of the region around the city of Maastricht, which is situated near the border. The risk of landslides is very low except for some elevated parts in the province of East Flanders. Threats caused by droughts are low throughout the entire region.

Figure 2.22: Natural hazard risks



2.3.3 (Renewable) Energy and energy infrastructure

This sub-dimension assesses cross-border functional links in energy supply and infrastructure, focusing on existing connections and missing links. The distribution of power lines, energy infrastructure and power stations is analysed to identify supply patterns and potential integration gaps. The analysis reveals whether the border facilitates energy cooperation and connectivity, or if infrastructural differences create barriers.[13]

2.3.3.1 Power lines and energy infrastructure

Indicator description

The indicator shows the distribution of power lines and energy infrastructures in the cross-border region. The geodata highlights the existing links and gaps in the cross-border interconnections of the energy transmission network.

- **Source/method of retrieval**: Geodata on high-voltage energy infrastructure (100 kV and above) has been collected and processed from OpenStreetMap.
- **Temporal coverage**: 2025
- **Unit**: kV

Please refer to the technical annex for more information.

Figure 2.23 illustrates the distribution of power lines and cables in 2025 across the border region. The data distinguish between overhead and underground power lies, further classified into high-voltage (100-230 kV), extra high-voltage (230-1,000 kV), and ultra-high voltage (above 1,000 kV).

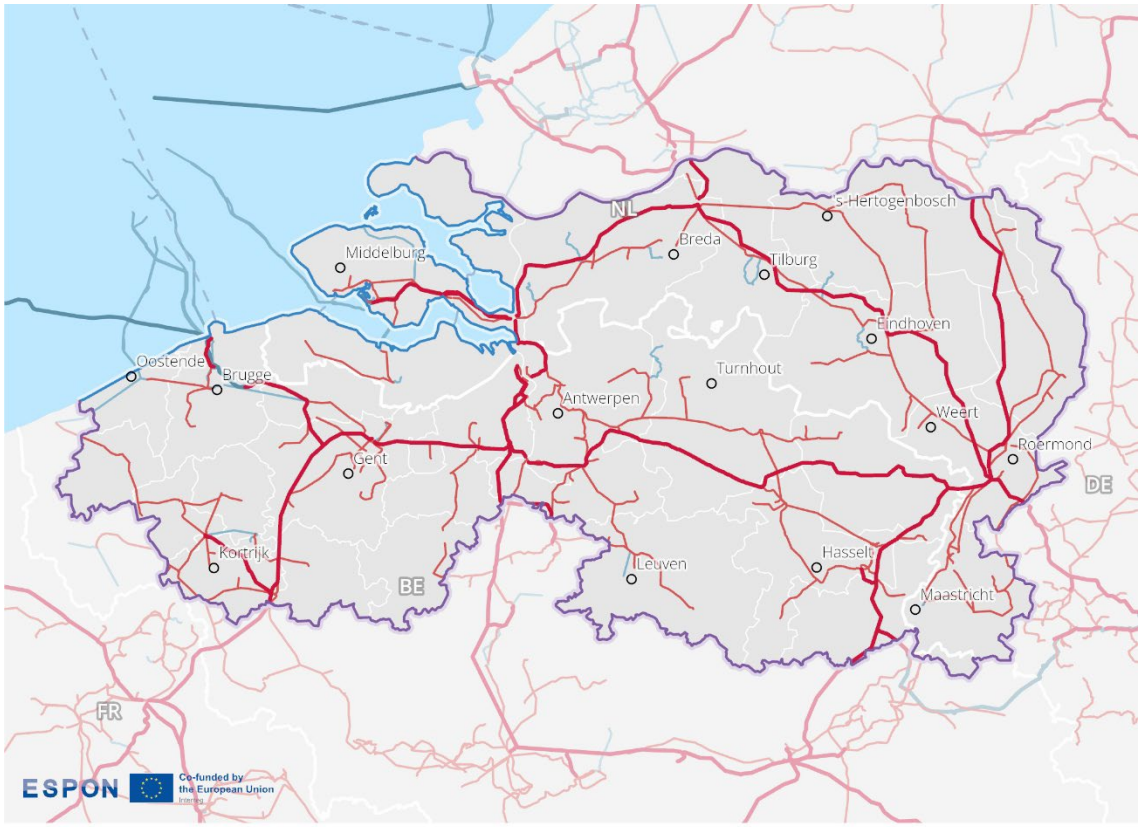
The cross-border area features extensive high- and extra high-voltage energy infrastructure. On both sides of the border, the dominant east-west direction is taken by extra high-voltage power lines, which continue as submarine cables once they reach the coast. In the eastern part of the cross-border area, extra high-voltage lines branch off in a north-south direction further inland in both countries. Both countries are directly connected by extra high-voltage lines at both ends of the land border, as well as by one submarine cable in the west.

Analysis of electricity network integration showed that the Belgium-Netherlands border region scored amongst the highest level of integration, reflecting well-developed infrastructure and coordination. Further, the border area was found to have supportive frameworks for cross-border cooperation on energy communities. Nevertheless, they have not fully addressed how these communities could work across borders.[14]

[13] See also: European Commission 2025: Handbook on Cross-border Energy Communities, https://ec.europa.eu/regional_policy/sources/studies/2025/Handbook_on_Cross-border_Energy_Communities.pdf

[14] Spatial Foresight et al (2025) Handbook on Cross-border Energy Communities, European Commission DG regio, p. 19

Figure 2.23: High-voltage transmission infrastructure



Overhead power lines (2025)

- High Voltage (100–230 kV)
- Extra High Voltage (230–1.000 kV)
- Ultra High Voltage (1.000 kV+)

Underground power cables (2025)

- High Voltage (100–230 kV)
- Extra High Voltage (230–1.000 kV)
- Ultra High Voltage (1.000 kV+)

inside / outside of the Interreg VI-A perimeter

ANSI Standard C84.1 was used for classification of power lines.

Level of detail: geolocated lines
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON CROSSGOV, 2026
©EuroGeographics for administrative boundaries

- Interreg VI-A perimeter
- perimeter coastal line
- national border
- NUTS 3 border
- ferry

0 10 20 km

2.3.3.2 Power stations

Indicator description

The indicator shows the location of power stations by type and energy production levels (coal, gas and oil, nuclear, hydro). It can indicate differences and complementarities in the national energy supply systems as well as highlight potential supply-demand links when viewed in conjunction with power lines infrastructure.

- **Source**: OpenStreetMap, Global Energy Monitor, JRC Hydro-power plants database
- **Temporal coverage**: 2025
- **Unit**: MW

Please refer to the technical annex for more information.

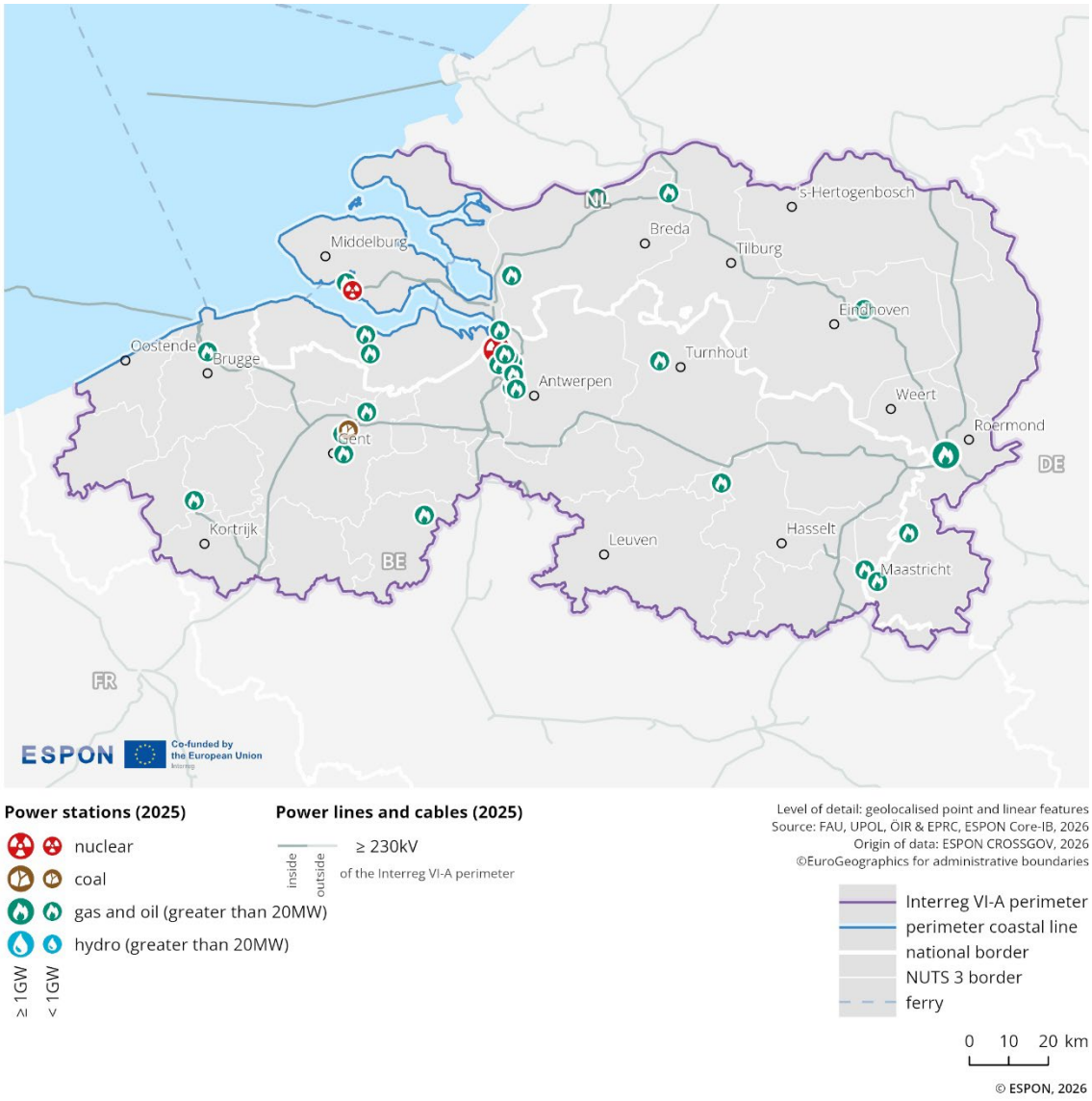
In this cross-border region there are 31 power station locations (see Table 1). The majority are gas and oil power stations.

Table 1: Number and type of power stations

Power stations/plants	Less than 1GW	1GW and up
Nuclear	1	1
Coal	1	/
Gas and oil	27	1
Hydro	/	/

Of the total of 28 gas and oil power stations, 10 are located in the Netherlands, and 6 of them located relatively close to the border with Belgium (see Figure 2.24). One of them, near Roermond in the eastern part of the Dutch territory, offers a high output. The remaining 18 gas and oil power stations are located in Belgium, with a high concentration around Antwerpen in the centre of the programme area. There is one coal-fired power station in the region, near Gent (Belgium), and 2 nuclear power plants, one – high-output plant - is located in Belgium almost on the common border north of Antwerpen. The other nuclear power plant is placed in Zeeland in the Netherlands.

Figure 2.24: Power stations infrastructure



2.3.4 Resources and circular economy

This sub-dimension focuses on resource use patterns in the border region and their implications for circular economy practices. It analyses resource productivity and waste generation in order to evaluate the efficiency and sustainability of resource utilisation across the border.

2.3.4.1 Resource productivity

Indicator description

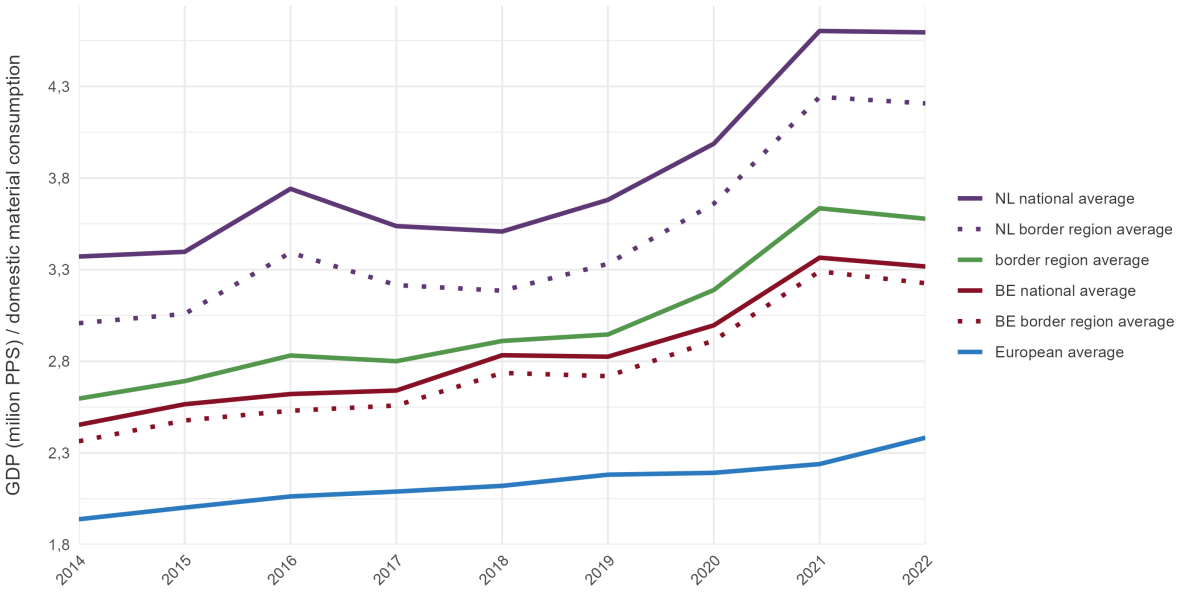
The indicator shows the economic value generated per unit of material consumed for each region within the cross-border area. Developments over time provide insights if the decoupling of productivity from resource use is progressing on regional level.

- **Source/method of retrieval**: Processing of Eurostat and ESPON CIRCTER (Circular Economy and Territorial Consequences) Update data
- **Temporal coverage**: 2014-2022
- **Unit**: PPS/tons

Please refer to the technical annex for more information.

Figure 2.25 illustrates the development of GDP per unit of domestic material consumption in million PPS/DMC (purchasing power standards per domestic material consumption) between 2014 and 2022. The data compare the national averages, the averages of their respective border regions, and the overall border regional average with the European average.

Figure 2.25: Resource productivity



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The Dutch national average of resource productivity is represented by the highest line in the graph, showing an increase over the period from approximately 3.3 in 2014 to over 4.55 million PPS/DMC in 2022. The Dutch border region average follows a similar trend but remains slightly lower, reaching a value of around 4.3 million PPS/GDP in 2022.

The Belgian national average also shows an upward trend over the observed period, remaining significantly below the Dutch national values, but still above the European average. The Belgian border region average follows a similar pattern, albeit at slightly lower levels.

The European average lies below the Belgian and Dutch values. The border region average represents the combined average of the higher Dutch border region values and the lower Belgian border region values, reaching approximately 3.55 million PPS/DMC in 2022.

2.3.4.2 Generation of waste per GDP

Indicator description

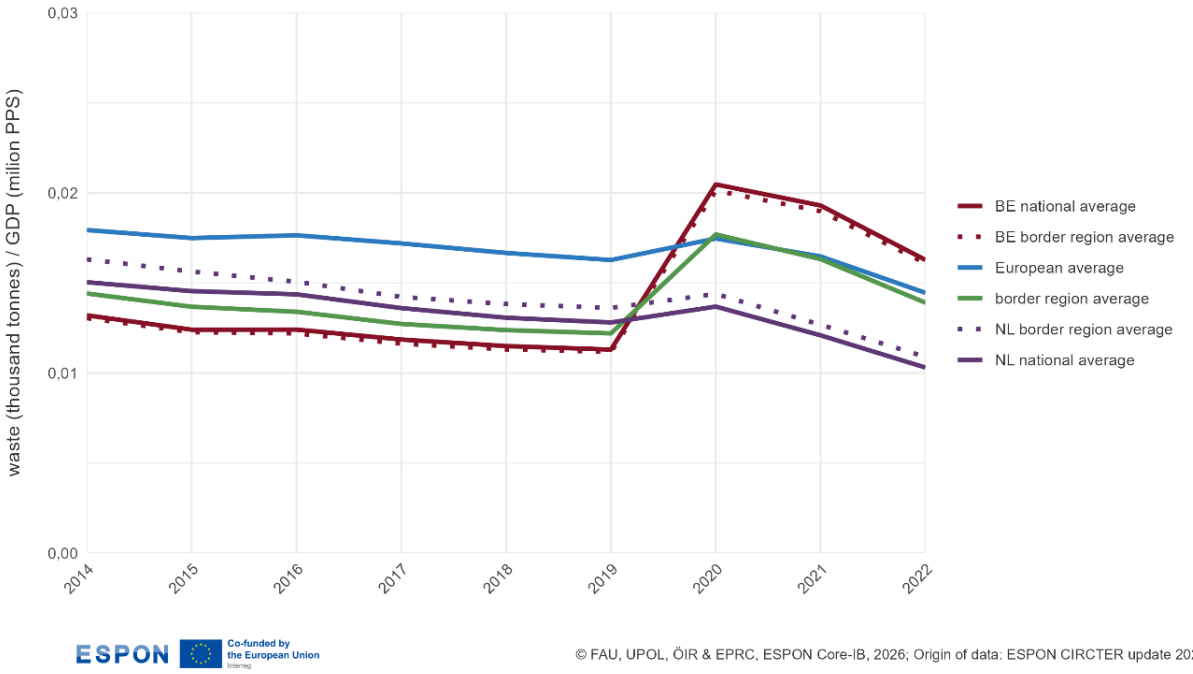
The indicator shows the regional distribution of waste creation in relation to the GDP development. Comparing waste generated to GDP reflects the waste intensity of the economy and provides a measure of "eco-efficiency". Observation of its change from year to year permits to assess whether the economy is able to produce more wealth while at same time generating less waste.

- **Source/method of retrieval**: Processing of Eurostat and ESPON CIRCTER Update data
- **Temporal coverage**: 2014-2022
- **Unit**: Tons/PPS

Please refer to the technical annex for more information.

Figure 2.26 illustrates trends in waste generation relative to economic output, measured in tonnes of waste per million PPS (Purchasing Power Standard) of GDP from 2014 to 2022.

Figure 2.26: Waste generation per GDP



The Dutch national average of waste per GDP steadily decreases over time, reaching a value of approximately 0.01 tonnes of waste per GDP in 2022. The Dutch border region average follows a similar trend,

remaining very close to the national average. For the period 2014-2019, the Belgian national and border region averages are at a lower level than the Dutch values until 2019, when both experience a sharp increase to around 0.02 tonnes of waste per GDP. Subsequently, both Belgian values decline again but remain above the Dutch values.

The European average decreases gradually from around 0.018 in 2014 to about 0.015 tonnes of waste per million PPS in 2022. The Netherlands' national and border region values remain below the European average throughout the entire period. Belgium's national and border region values are below the EU average until 2019 but rise significantly above it from 2020 onwards. The combined cross-border regional average steadily decreases and remains below the European average until 2019, then rises sharply in 2020. From 2019 onwards, the border region average is almost aligned with the European average.

2.3.5 Key messages on the green dimension

Protected areas within the Interreg region are concentrated in the eastern and coastal areas, particularly near Hasselt and Eindhoven. Both show clear cross-border counterparts. As an indication of environmental pollution levels, air pollution levels show a wide range. Overall, compared to the territories in the Netherlands, Belgian regions show higher individual peaks in PM2.5 concentrations (in µg/m³). Belgian NUTS3 averages also show display more variability, and several exceed 10 µg/m³. The European average is around 7 µg/m³.

In terms of environmental hazards, the threat of sea and river flooding is widespread. The North Sea poses a very high risk for almost the entire region of Zealand (NL) as well as the Belgian coastal areas. The Rhine delta also threatens the northern Dutch part of the border region. Further threats stem from the Meuse River. Ongoing collaboration in water management and combatting/adapting to climate change remain important for the area.

The cross-border area features extensive high- and extra high-voltage energy infrastructure. In total, there are 31 power station locations, the majority are represented by gas and oil power stations. For resource productivity (in PPS) and waste generation per unit of GDP, the European average for resource productivity lies notably below the Belgian and Dutch values. The Dutch average of waste per GDP steadily decreases over time. Belgian values have also declined but remain above the Dutch values. From 2019 onwards, the border region average is almost aligned with the European average.

2.4 Socio-economic dimension

The socio-economic dimension examines patterns of cross-border connectivity in social media, tourism, and access to public services in the border region. It identifies how socio-cultural links; visitor flows and essential services influence development in the cross-border area. By examining interpersonal interactions via social media, language similarities, tourism intensity, and the accessibility of facilities such as secondary schools, grocery shops, hospitals, doctors, pharmacies and cinemas this dimension highlights both functional integration and potential socio-spatial differences.

2.4.1 Social integration

This sub-dimension evaluates the level of social integration in the border region. It analyses cross-border connectivity in social media and language similarities across and along national borders to evaluate the potential for deeper cultural and social integration.

2.4.1.1 Cross-border connectivity in social media

Indicator description

The indicator refers to the existing connections between users of META social media (in particular Facebook) across the border. It aims at giving an overview of the degree of personal connectivity between inhabitants of the border area. Even though not all these internet connections will relate to real communication exchanges but sometimes just "following" content from other users, they give an overview of interpersonal and cultural knowledge of the social media landscape from across the border.

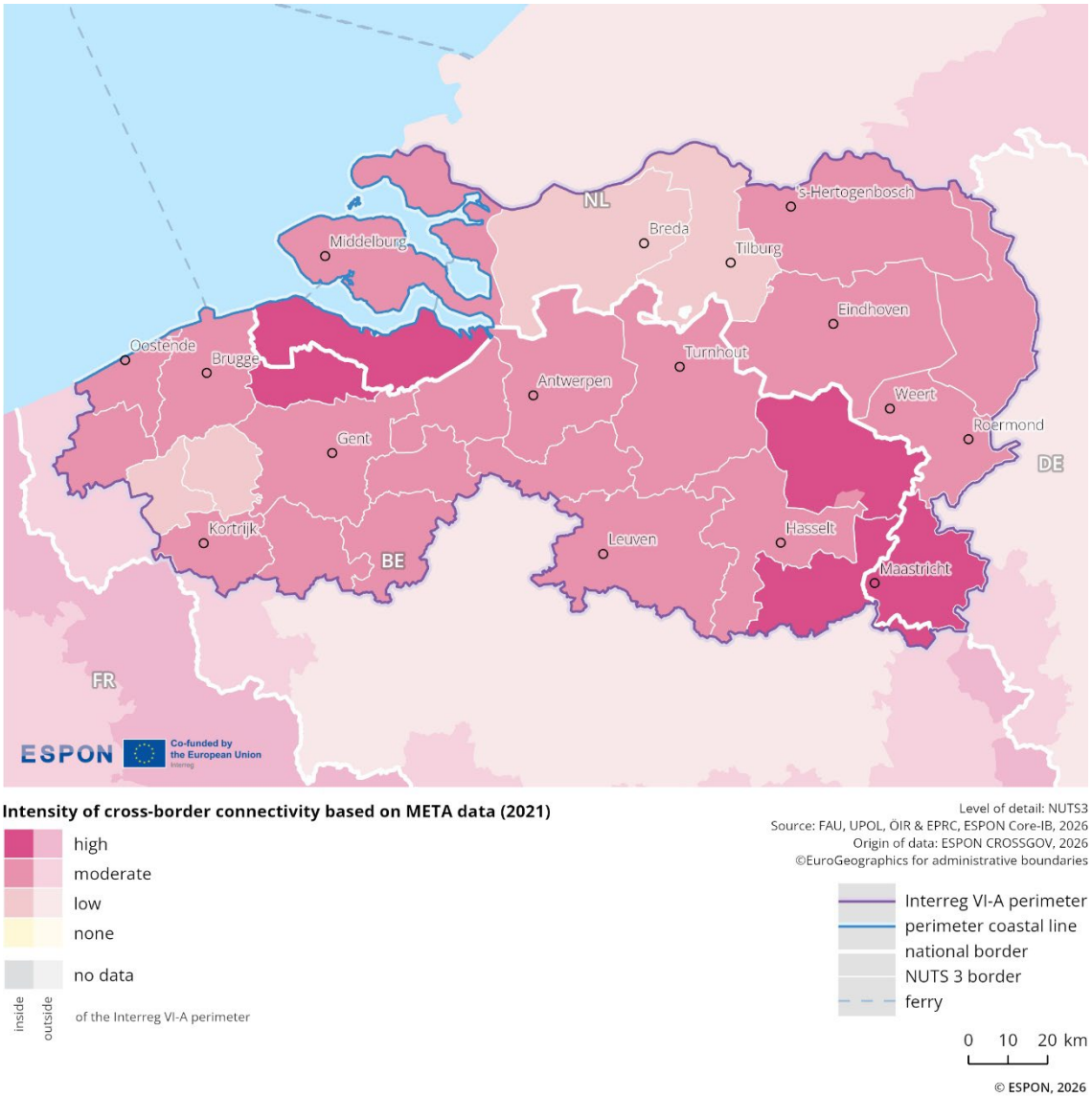
- **Source/method of retrieval**: Processing Facebook data on existing connections across the border (data for Good Meta)
- **Temporal coverage**: 2021
- **Unit**: n/a

Please refer to the technical annex for more information.

Figure 2.27 illustrates the spatial distribution of cross-border connectivity based on Facebook information in the border area. The different shades of pink indicate varying intensities of connectivity, ranging form low to high, with darker tones representing stronger intensity of cross-border connectivity in social media.

The intensity of connectivity among residents of this border region is heterogeneous, although some symmetries across the border can be observed as well. In the Flemish part, most areas exhibit moderate connectivity intensity, which increases to high in the eastern part (surrounding Hasselt) and in the northern part of the province of East Flanders. Lower connectivity intensity is observed in 2 NUTS-3 regions in western Flanders, farther from the Dutch border. In the Dutch part of the border region, the picture is heterogeneous, including regions with low, moderate and high connectivity intensity. Low intensity is recorded in the Noord-Brabant (Breda and Tilburg), while high-intensity areas closely correspond to the Belgian counterparts, and are located in the south of Limburg (Maastricht) and Zeeland.

Figure 2.27: Cross-border connectivity in social media



2.4.1.2 Language similarities along national borders

Indicator description

The indicator specifies whether the language is the same across the border, whether the respective national languages have commonalities, whether while different, there are local linguistic commonalities, and whether the language is different.

- **Source/method of retrieval**: ESPON cross-border public services (CPS) 2.0 database along border segments
- **Temporal coverage**: 2022
- **Unit**: n/a

Please refer to the technical annex for more information.

The border region shares a common language, Dutch. On the Belgian side, this is the Flemish variety of Dutch, which differs slightly in pronunciation and vocabulary but is mutually intelligible. This facilitates cross-border communication and cooperation. Regional dialects exist within the area as well.

2.4.2 Tourism

This sub-dimension identifies key tourism hotspots in the border region to highlight tourism dynamics. It analyses the number of nights spent in tourist accommodation establishments to evaluate the attractiveness of, and developments in, the tourism sector. Comparisons with the respective countries and the EU average provide context for understanding the region's dynamics.

2.4.2.1 Nights spent at tourist accommodation establishments

Indicator description

The indicator shows the number of nights a guest or tourist actually spends in a tourist accommodation establishment or non-rented accommodation (overnight stays). This may reveal the tourism attractiveness of a region and shed light on the role of tourism in the local economy, i.e., tourists/guests staying overnight may spend more in the region than one-day visitors.

- **Source**: Eurostat
- **Temporal coverage**: 2020-2023
- **Unit**: Nights per capita

Please refer to the technical annex for more information.

The spatial distribution of overnight stays highlights the importance of key tourist destinations in border areas. Tourism contributes significantly to regional income, infrastructure development and employment, and thereby supports regional prosperity. At the same time, it affects environmental and living conditions, which may reduce local acceptance despite its economic benefits. This is the case in places of overtourism, seasonal pressures, and increasing land-use conflicts.

Figure 2.28 shows the number of overnight stays per capita at tourist accommodation establishments in 2023. It includes hotels, holiday and other short-stay accommodation, as well as campsites, caravan and trailer parks. The map uses a colour gradient, with darker shades indicating a higher number of nights spent per capita in 2023. It also shows the cumulative number of overnight stays from 2020 to 2023.

In 2023, a particularly high intensity of overnight stays is evident in coastal regions. Several NUTS3 regions exceed 20 nights per capita in 2023, including Overig Zeeland, Zeeuws-Vlaanderen in the Netherlands and Arr. Oostende in Belgium.[15] In addition, arr. Brugge exceeds 10 nights per capita. In the other regions the per capita figures are somewhat lower with a few eastern regions exceeding 10 nights spent (e.g., Arr. Maaseik, Midden-Limburg and Noord-Limburg).

In terms of total overnight stays over the 3-year period, the leading tourism regions are in Overig Zeeland (approx. 9.9 million), Zuid-Limburg (approx. 5.9 million), Zuidoost-Noord-Brabant (approx. 5.6 million) and Noord-Limburg (approx. 5.4 million).

[15] See Eurostat Statistical Atlas for NUTS3 (2021) regions: https://ec.europa.eu/statistical-atlas/viewer/?config=typologies.json&ch=NUTS&mids=BKGCNT,NUTS2021L3,CNTOVL&o=1,1,0.7&center=49.69576,14.3332,4&lcis=NUTS2021L3&

Figure 2.28: Overnight stays in tourism

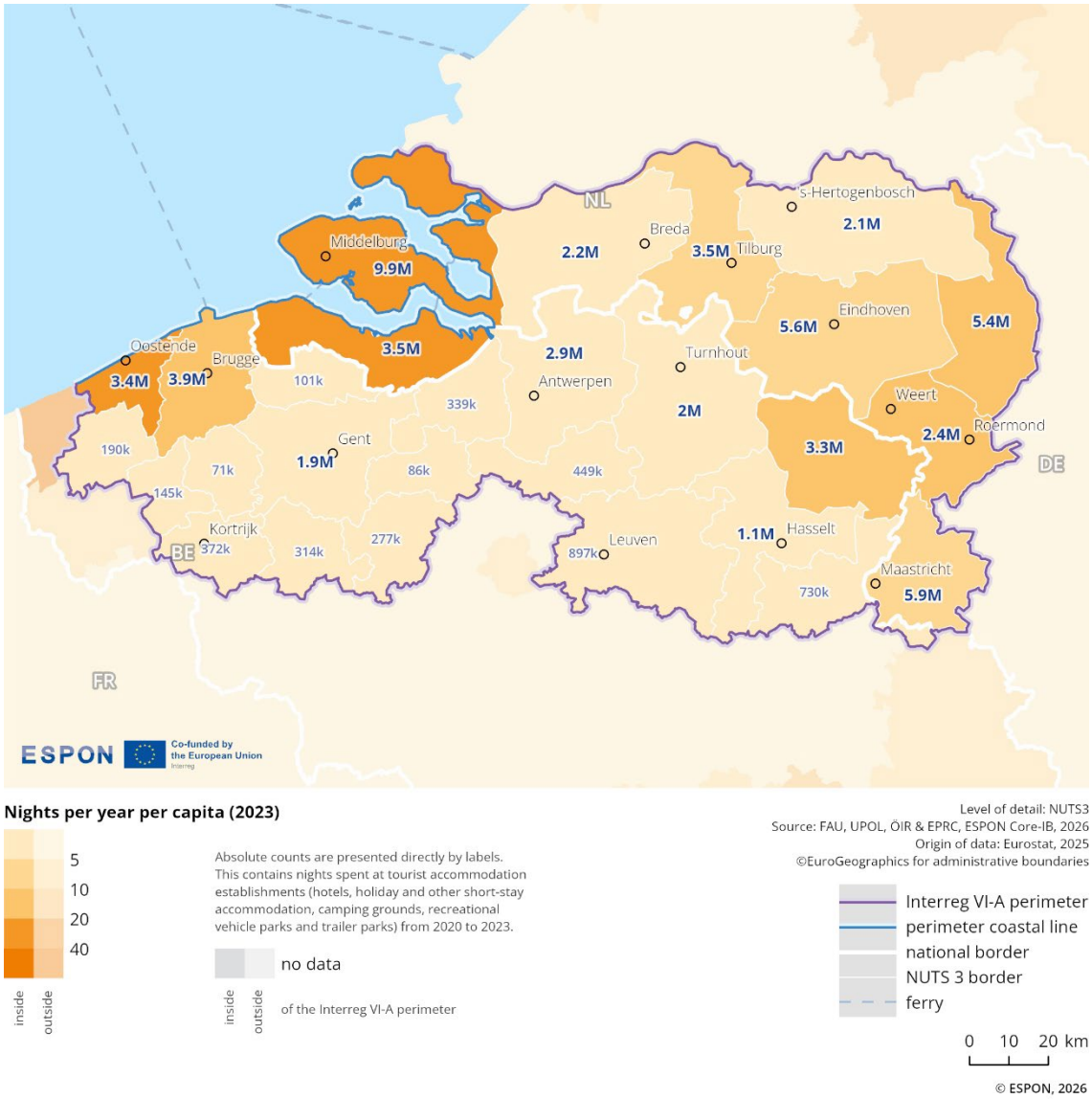
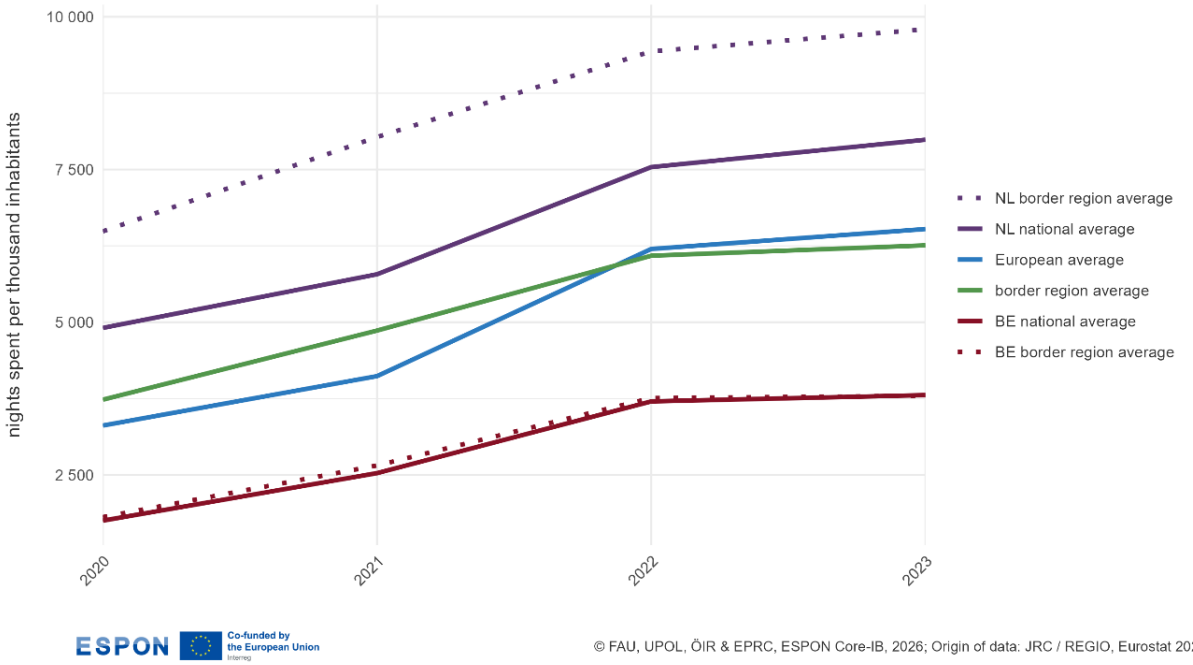


Figure 2.29 illustrates the development of nights spent at tourist establishments per thousand inhabitants from 2020 to 2023. Since 2023, the average for the Belgium-Netherlands programme area is slightly lower than the overall European average, which includes both EU member states and the EFTA countries Iceland, Liechtenstein, Switzerland and Norway. Before, it was higher. While the border regional average in the Netherlands is higher than the national average for all 4 years, the Belgian border regional average is similar to the national average.

Patterns of tourism have a series of implications for spatial development on either side of the border. Transport infrastructure must consider peak volumes and balancing recreating activities with socio-cultural as well as environmental heritage can be a challenge.

Figure 2.29: Overnight stays in tourism (comparison)



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2.4.3 Services of general interest

This sub-dimension looks at how accessible services of general interest (SGIs) are in the border region, identifying areas that are well-served and those that are more difficult to access. It analyses access to essential services such as secondary schools, grocery shops, hospitals, doctors, pharmacies and cinemas.

2.4.3.1 Accessibility to services of general interest

Indicator description

The indicator shows, for the below listed facilities and services, the average driving time to the nearest facility of a series of services of general interest.

- **Source/method of retrieval**: Processing and analysis of standardised travel-time accessibility to secondary schools, grocery shops, hospitals, doctors, pharmacies and cinemas available in the ESPON PROFECY Update (2022)
- **Temporal coverage**: 2021
- **Unit**: Minutes (in 2.5 x 2.5 km grid)

Please refer to the technical annex for more information.

Figures 2.30 to 2.35 visualise average car travel times to services of general interest within the programme area. The maps display accessibility to:

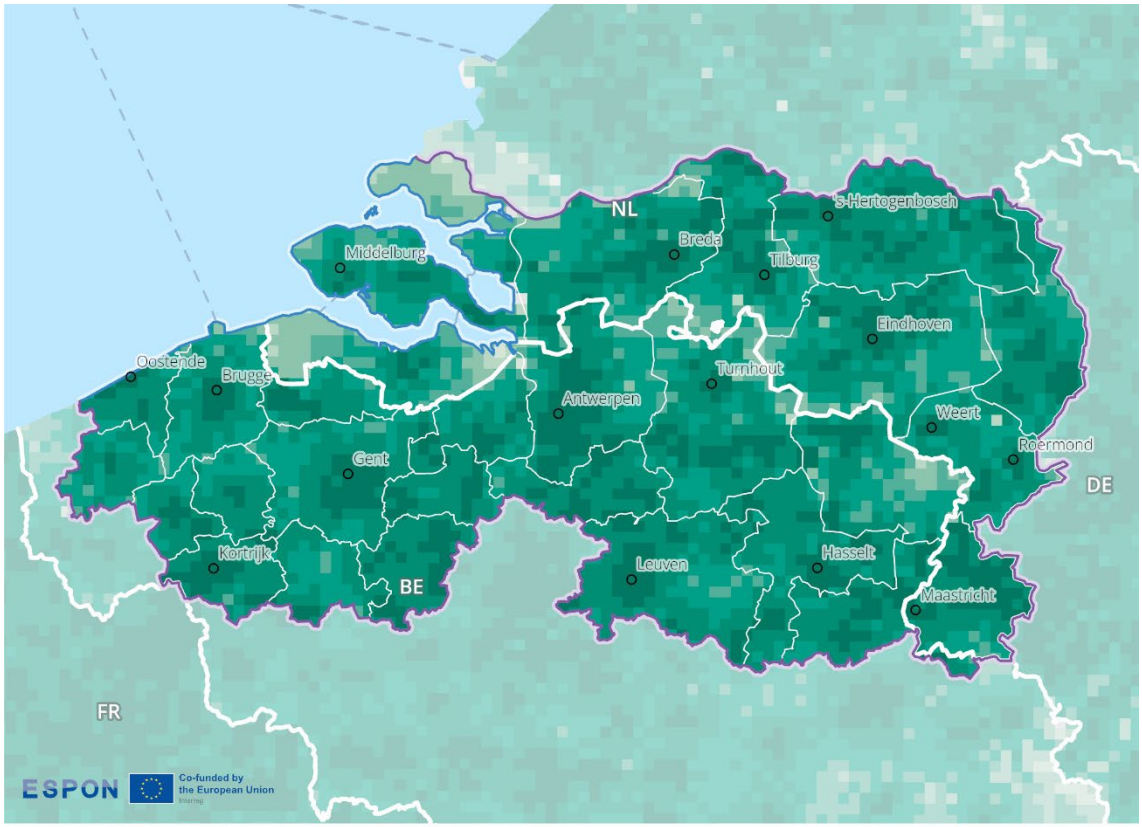
- Secondary schools (Figure 2.30)
- Grocery shops (Figure 2.31)
- Hospitals (Figure 2.32)
- Doctors (Figure 2.33)
- Pharmacies (Figure 2.34)
- Cinemas (Figure 2.35)

These indicators show how long, on average, it takes to reach the nearest facility by car. The data comes from the ESPON PROFECY Update project (2022) and is visualised based on a 2.5-kilometer grid.

The maps show that essential services such as doctors, pharmacies, schools, and grocery shops are fairly evenly distributed across the border region. All analysed essential services are accessible in less than one hour throughout the whole area.

Yet, travel times are slightly longer in the areas adjacent to the border compared to the rest of the territories. Travel times to doctors and schools are also slightly longer in the north of Zeeland in the Netherlands. Another common patter relates to the accessibility of hospitals which appears higher (i.e., shorter travel time) in the urban centres and more densely populated areas, which indicate certain urban–rural gradient. The same pattern applies to cinemas as a cultural service.

Figure 2.30: Travel time to secondary schools



Car travel time to the nearest secondary school (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside outside of the Interreg VI-A perimeter

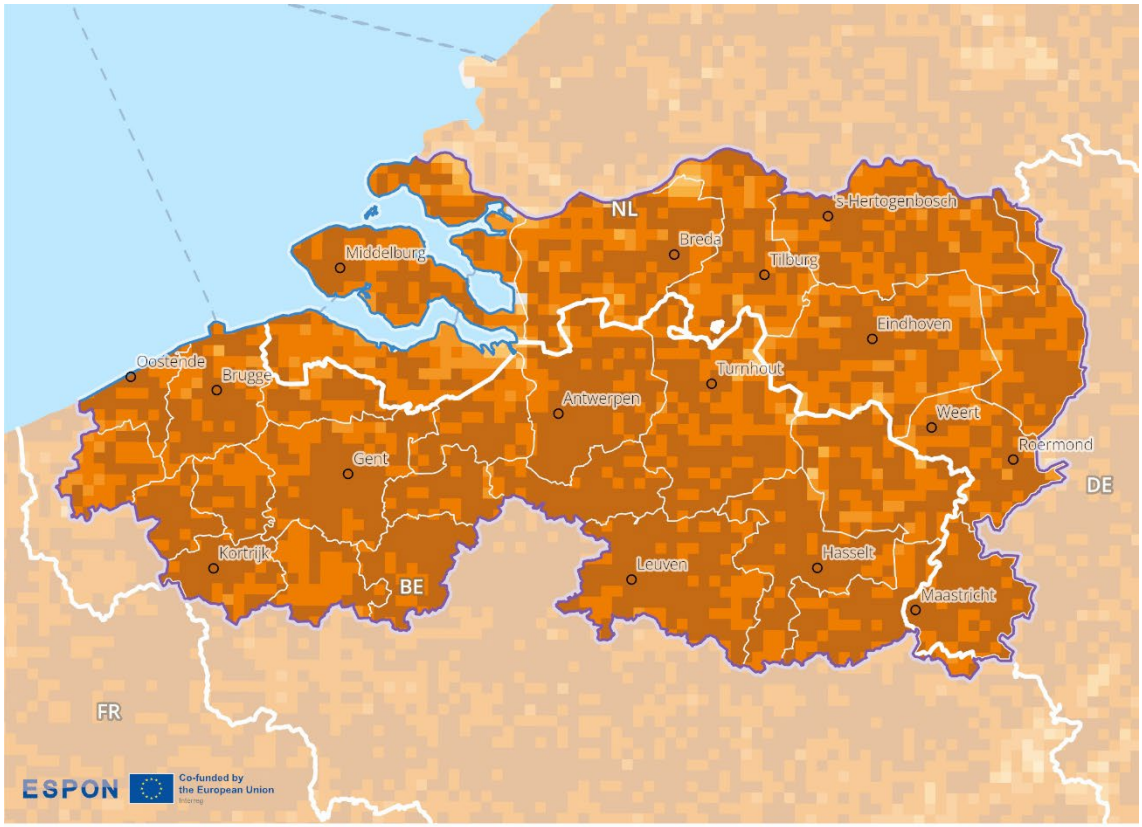
Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
perimeter coastal line
national border
NUTS 3 border
ferry

0 10 20 km

© ESPON, 2026

Figure 2.31: Travel time to grocery shops



Car travel time to the nearest shop (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

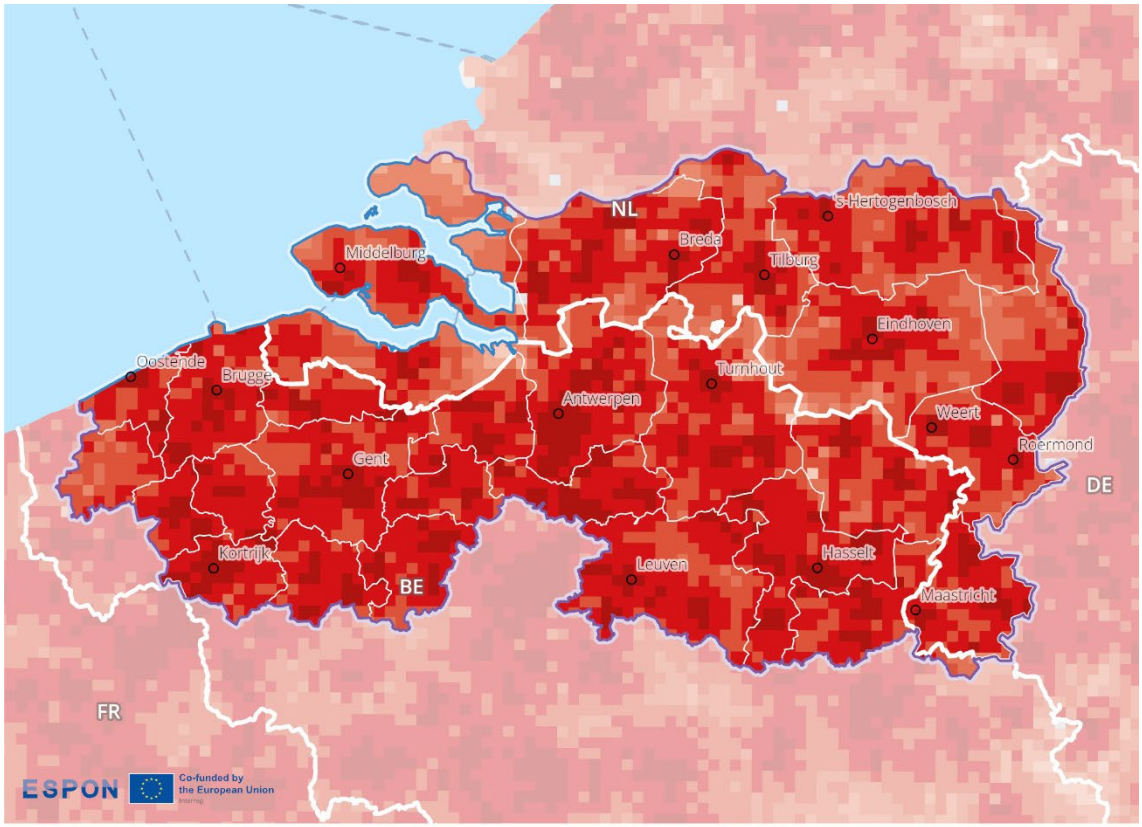
inside outside of the Interreg VI-A perimeter

Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
perimeter coastal line
national border
NUTS 3 border
ferry

0 10 20 km

Figure 2.32: Travel time to hospitals



Car travel time to the nearest hospital (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside outside of the Interreg VI-A perimeter

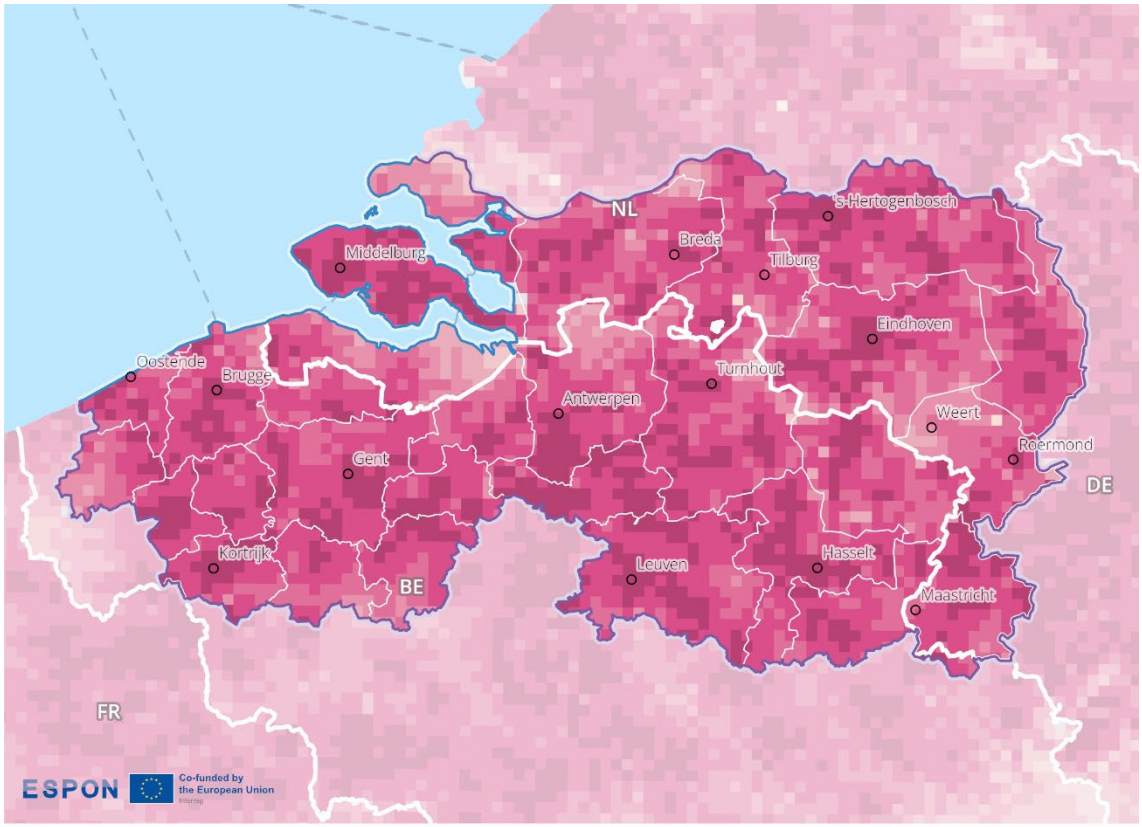
Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
perimeter coastal line
national border
NUTS 3 border
ferry

0 10 20 km

© ESPON, 2026

Figure 2.33: Travel time to doctors



Car travel time to the nearest doctor (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside outside of the Interreg VI-A perimeter

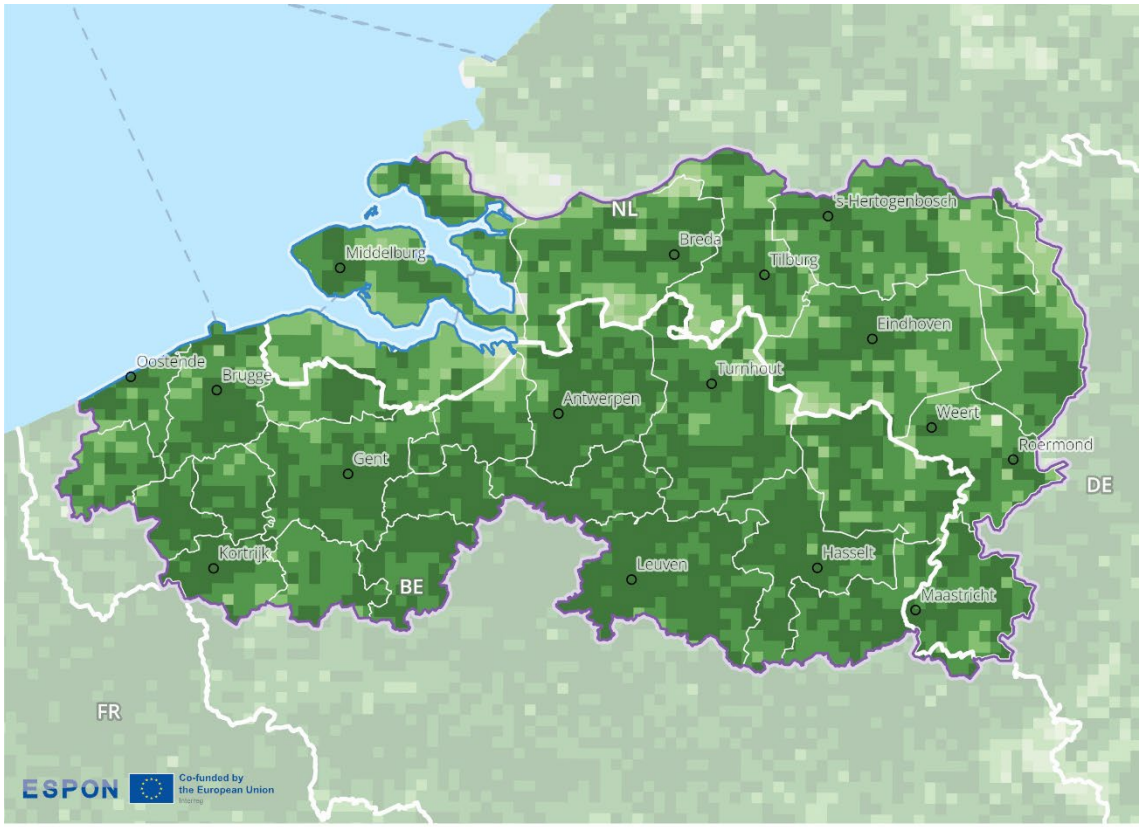
Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
perimeter coastal line
national border
NUTS 3 border
ferry

0 10 20 km

© ESPON, 2026

Figure 2.34: Travel time to pharmacies



Car travel time to the nearest pharmacy (2021)

5min
10min
15min
20min
30min
45min
1h
2h
3h
4h
6h
12h

inside outside of the Interreg VI-A perimeter

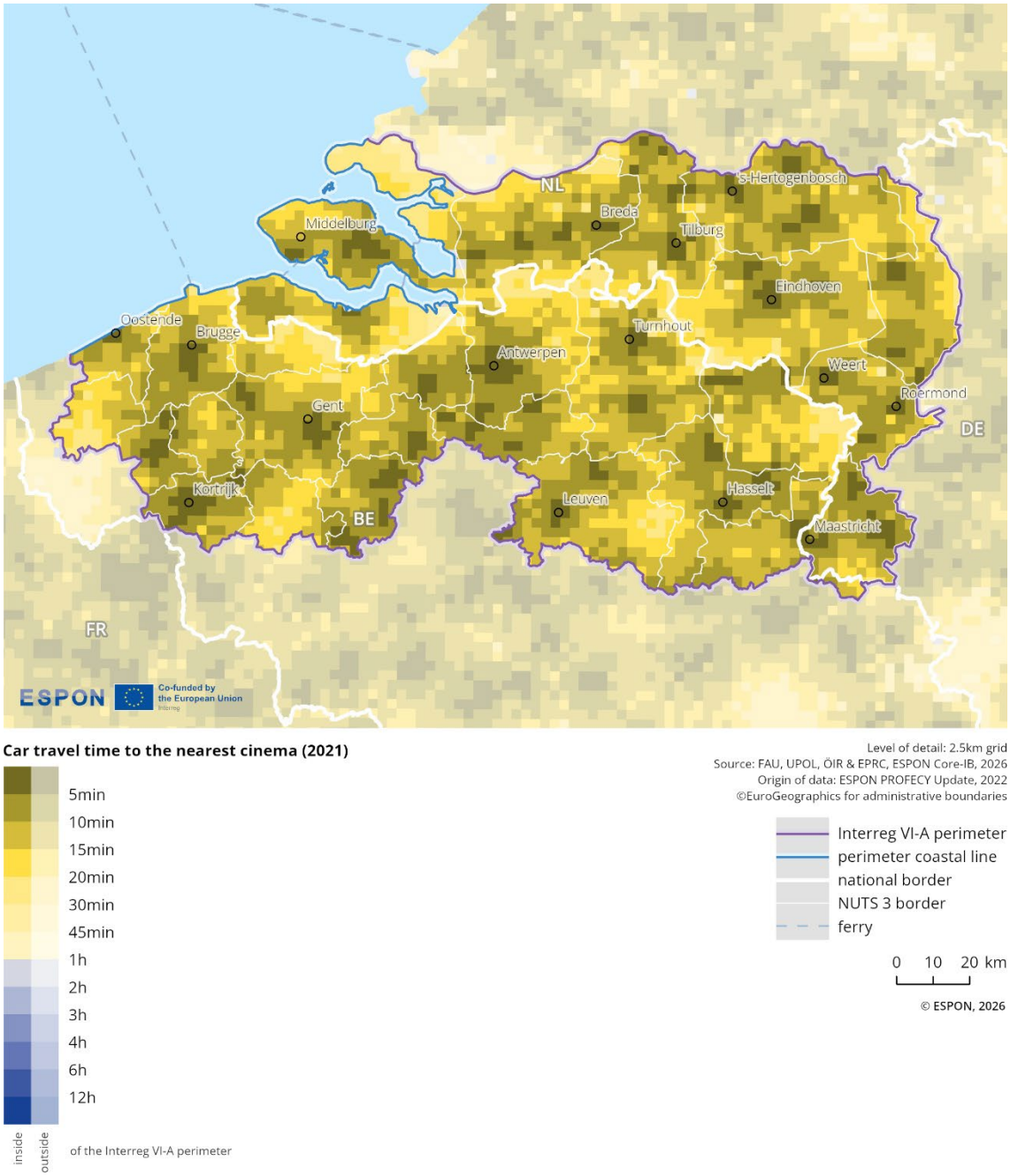
Level of detail: 2.5km grid
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON PROFECY Update, 2022
©EuroGeographics for administrative boundaries

Interreg VI-A perimeter
perimeter coastal line
national border
NUTS 3 border
ferry

0 10 20 km

© ESPON, 2026

Figure 2.35: Travel time to cinemas



2.4.4 Key messages on the socio-economic dimension

The intensity of cross-border connectivity in social media across the border region is somewhat heterogeneous. Some areas display higher levels of online interaction, which may signal stronger socio-cultural ties and a more favourable foundation for social integration. Other areas show low to moderate levels of connectivity, suggesting fewer informal online networks and potentially lower perceived social proximity. Notably, several cross-border symmetries emerge, with hotspots of high connectivity intensity appearing in adjacent areas across the border, particularly between north of East Flanders (BE) and south of Zeeland (NL) and between areas of Flemish and Dutch Limburg in the east. Conversely, lower intensity is observed in the West- and Midden-Brabant in the Netherlands, despite linguistic similarities, indicating that language alone does not necessarily translate into higher socio-cultural connectivity.

The region shows active tourism dynamics, with an intensity of overnight stays close to the European average. The data indicate a high concentration of tourism activity in coastal regions, including Overig Zeeland, Zeeuwsch-Vlaanderen in the Netherlands and Arr. Oostende in Flanders. Additionally, a comparison between the 2 sides of the border reveals that the average number of nights spent is significantly higher on the Dutch side, indicating potential for more balanced tourism development across the border region.

Essential services such as doctors, pharmacies, schools, and grocery shops are evenly distributed and accessible within an hour across most of the border region. Areas adjacent to the national border still experience slightly longer travel times.

2.5 Border security and safety

This dimension shows the security and safety conditions in border regions. It analyses the number of days on which border control is temporarily reintroduced at internal borders, using this as an indicator of security concerns and restrictions on cross-border movement.

2.5.1 Temporary reintroduction of border controls at internal borders

Indicator description

The indicator shows the number of days of temporary reintroduction of border control at internal borders, including the official reasons behind. The reintroduction of border control at the internal borders must be applied as a last resort measure, in exceptional situations, and must respect the principle of proportionality. The scope and duration of reintroduced border control should be restricted to the bare minimum needed to respond to the threat in question.

- **Source/method of retrieval**: Processing and analysis data of European Commission information pursuant to Article 25 and 28 et seq. of the Schengen Borders Code
- **Temporal coverage**: 2006-2025 (cut-off: 08 May 2025, in order to allow data treatment before work package completion)
- **Unit**: Days per year

Please refer to the technical annex for more information.

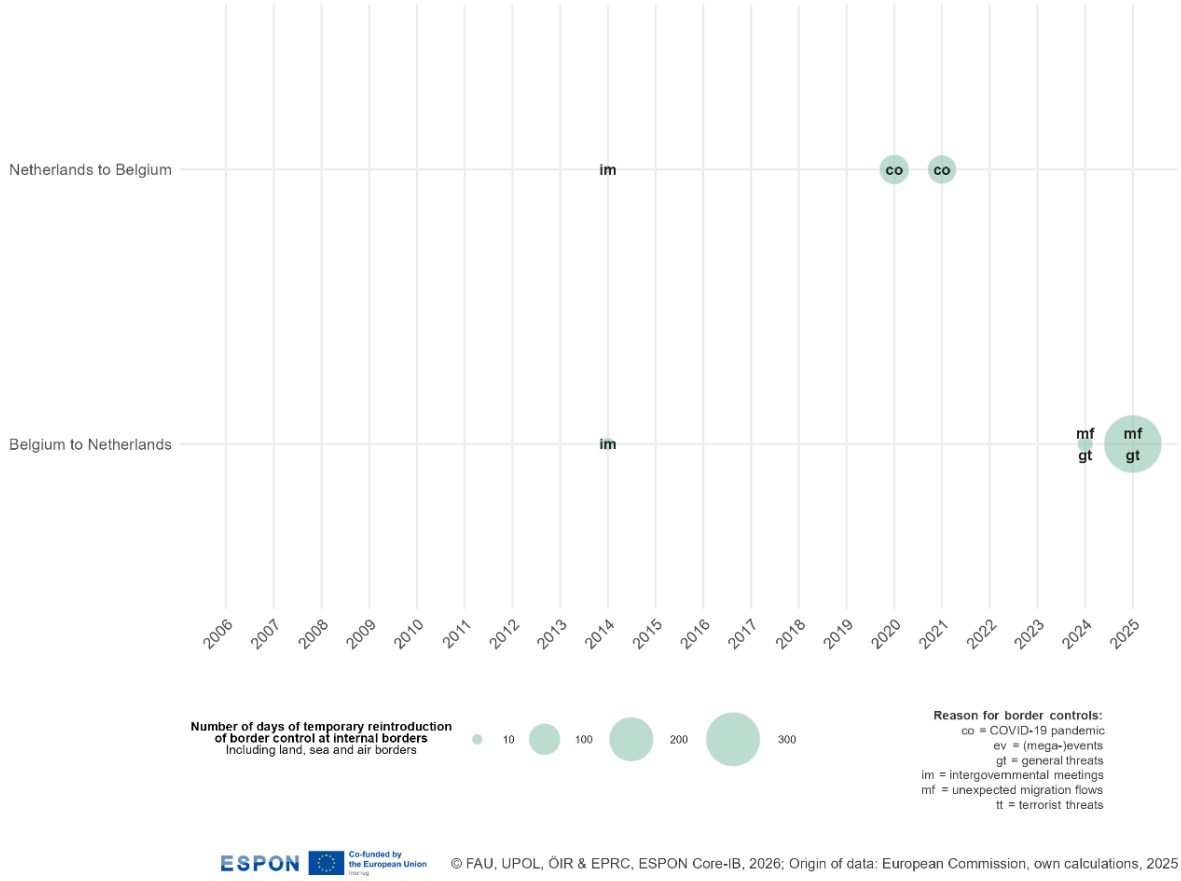
Figure 2.36 illustrates the number of days during which temporary border controls were reintroduced at internal borders within the Schengen Area. Each bubble represents a specific year with bubble sizes indicating the number of days the respective border was under control. The categories of reasons for reintroducing controls include:

- co – COVID-19 pandemic
- ev – (Mega-)events
- gt – General threats
- im – Intergovernmental meetings
- mf – Unexpected migration flows
- tt – Terrorist threats

The data spans from 2006 to 2025 (cut-off: 08 May 2025) and is based on notifications from the European Commission information pursuant to Article 25 and 28 et seq. of the Schengen Borders Code. In line with Schengen rules, the reintroduction of controls is to be used only as a last resort, for exceptional circumstances, and with strict adherence to the principle of proportionality in terms of both duration and scope.

Both, Belgium and the Netherlands had already been part of the Schengen Area by 2006.

Figure 2.36: Temporary reintroduction of border controls



The Belgium-Netherlands border area is characterised by a slightly asymmetric pattern:

- Crossing the border from the Netherlands to Belgium: Temporary border control occurred in 3 out of 20 years, mainly driven COVID-19 (2020-2021).
- Crossing the border from Belgium to the Netherlands: Temporary border controls occurred in 3 out of 20 years, primarily driven by irregular migration and the increases of criminal incidents (2024-2025).

From a comparative perspective, both countries have had controls in place for several days. While Belgium's border controls were mainly due to the pandemic, the Netherlands began controlling migration flows in 2024, indicating an unequal impact on cross-border movement in one direction.

These controls tend to have a tangible effect on the smooth functioning of cross-border flows, especially commuting and logistics, as they introduce delays and unpredictability.

2.5.2 Key messages on the border security dimension

From a comparative perspective, both countries have had controls in place for several days. While Belgium's border controls were mainly due to the pandemic, the Netherlands began controlling migration flows in 2024, indicating an unequal impact on cross-border movement in one direction.

These controls tend to have a tangible effect on the smooth functioning of cross-border flows, especially commuting and logistics, as they introduce delays and unpredictability.

2.6 Governance dimension

This section covers the cross-border governance profile of the border region. Both the Netherlands and Belgium are part of the Benelux union, an organisation in the forefront of European integration. In addition to its competences, the union also is strongly engaged in cross-border cooperation, including the creation of legal tools to facilitate cross-border cooperation. Subsequently the region has been at the forefront of territorial cooperation initiatives such as EGTC as described in section 2.6.1.1.

2.6.1 Cross-border cooperation

This sub-dimension identifies the extent of cross-border cooperation in the border region. It illustrates areas of high cooperation intensity and identifies functional links in governance structures across borders. It also identifies areas with high awareness of obstacles and the willingness and support services to overcome them, as well as areas where Interreg cooperation intensity is already strong.

2.6.1.1 Cross-border governance structures

Indicator description

The indicator shows active institutionalised cooperation that act as cross-border entities. It includes cooperation formats such as Eurocities, Euroregions, EGTC, cross-border associations, cross-border councils, etc.

- **Source/method of retrieval**: Localisation and categorising of cross-border cooperation formats (Eurocities, Euroregions, EGTC, cross-border associations, cross-border councils, conferences, working communities), based on desktop research.
- **Temporal coverage**: Status as of October 2025
- **Unit**: n/a

Please refer to the technical annex for more information.

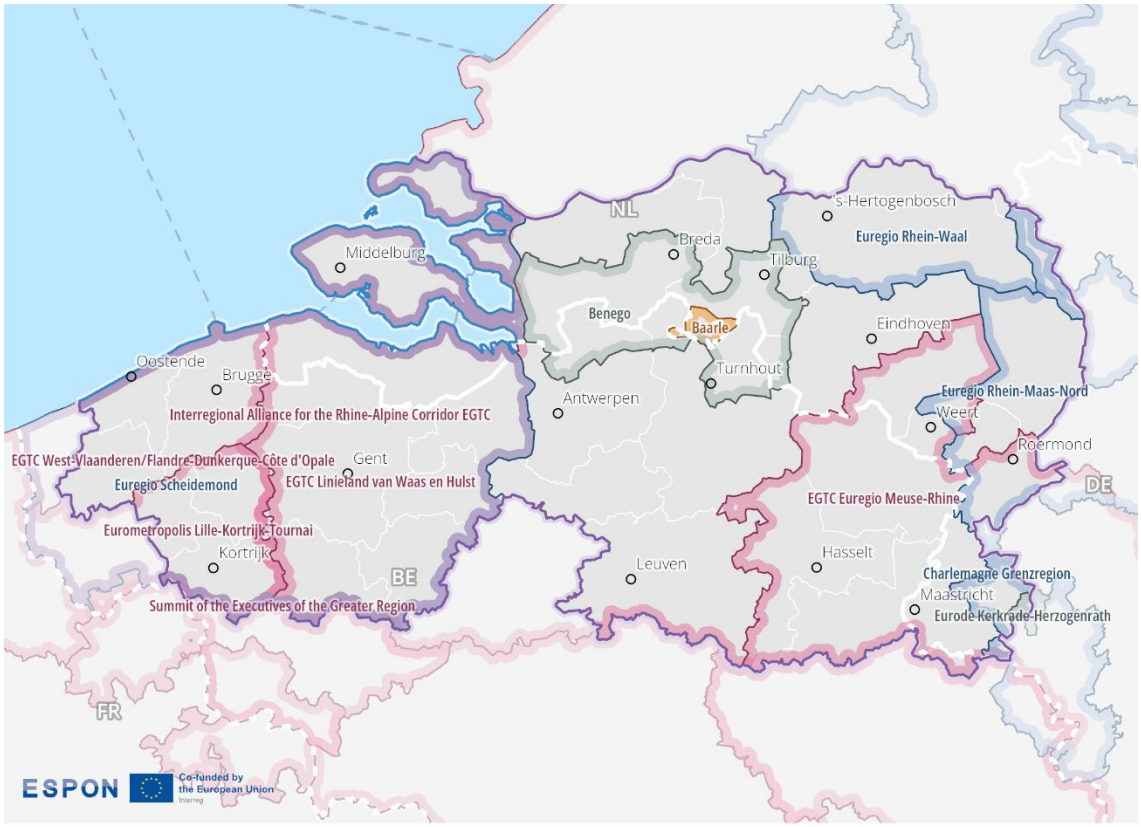
Figure 2.37 shows the different types of institutionalised cooperation. These governance structures either function as cross-border entities or bring together stakeholders from the cross-border region around shared topics. The governance structures covered include Eurocities, Euroregions, European Groupings of Territorial Cooperation (EGTCs), cross-border associations and councils. Project-based cooperation is not included.

The coloured markings on the map indicate different types of institutionalisations: EGTCs are shown in red, Eurocities in yellow, Euroregions/Euregios/Europaregions/Eurodistricts in blue, and other formats in grey.

The multi-level governance structure along the borders of this programme area shows broad spatial coverage. Overall, the region exhibits high levels of cooperation along its national borders, although existing cooperation structures often do not cover the full extent of the border region. The most prevalent formats are those at the Euroregional level and EGTCs. One example is the EGTC Linieland van Waas en Hulst, established in 2011, which includes members from Oost-Vlaanderen (BE) and Zeeland (NL). The EGTC is involved in a range of areas such as nature/biodiversity, port development/management, agriculture, tourism, transnational labour markets, labour mobility and economic development. Another example is the Rhine–Alpine Corridor EGTC, which covers a broad part of the border region and connects it to several countries, including Germany, Switzerland and Italy. Its activities are particularly relevant for the north-eastern part of the border region. Some of the identified governance structures are relevant only to one side of the border, such as the EGTC West-Vlaanderen / Flandre–Dun-

kerque–Côte d'Opale, which brings together Flemish and French territories. Others operate on the German–Dutch side, such as the Euroregion Rhein-Waal, which links territories in the Lower Rhine area with neighbouring regions in the eastern Netherlands.

Figure 2.37: Cross-border governance structures



2.6.1.2 Cross-border public services

Indicator description

The indicator shows different services specialised on cross-border challenges and development potential, including their domain of operation. As a specific form of services of general interest, cross-border public services (CPS) address joint problems or development potentials of border regions that are located on different sides of one or more national borders.

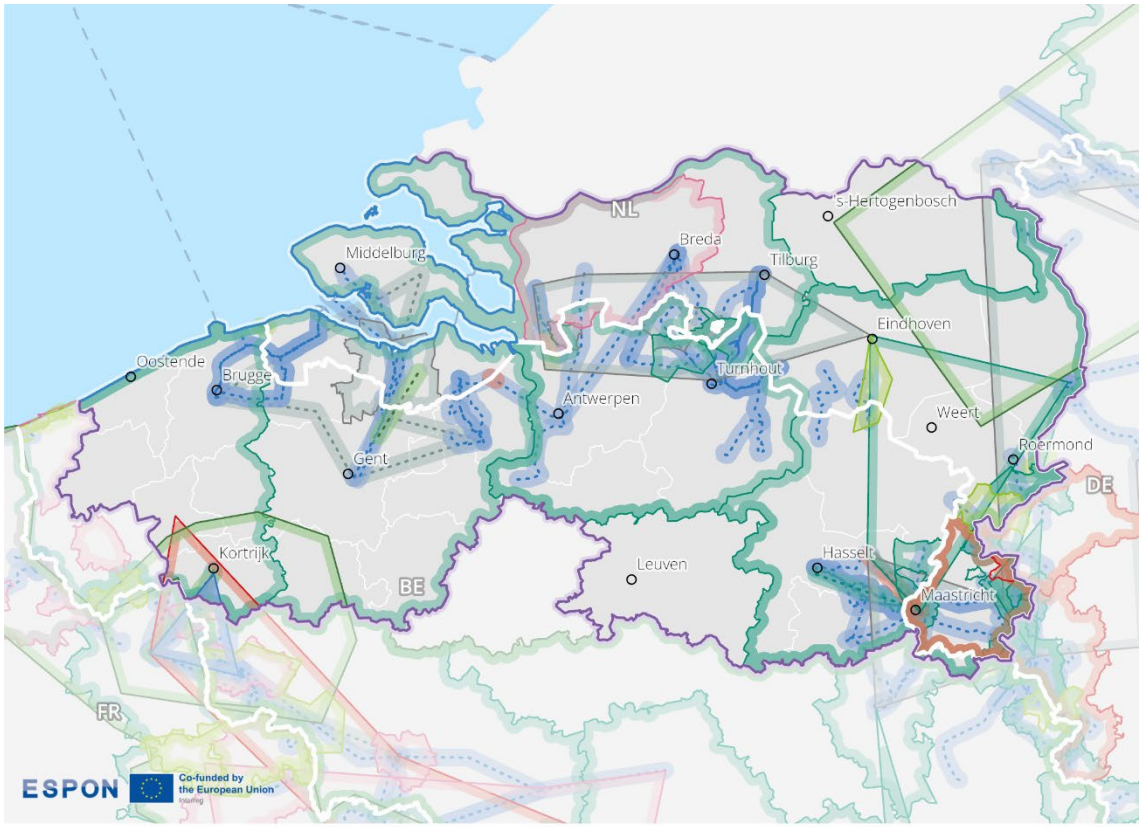
- **Source**: ESPON cross-border public services (CPS) 2.0 database
- **Temporal coverage**: 2022
- **Unit**: n/a

Please refer to the technical annex for more information.

Figure 2.38 depicts the geographical extent of cross-border public services in the border area in 2022. Different thematic areas are represented by distinct symbols and colours, indicating services such as disaster management, health care, transportation, education, environment, energy, job placement, and culture. The visualisation highlights where these services operate across the national boundary.

Cross-border public services between Belgium and the Netherlands are concentrated in the Maastricht area and around the central to western part of the border region. Transportation is one of the dominating factors, especially in the central border region, the western border region and in the Maastricht area. Tourism & information services are the other dominating factor, being widely spread in throughout the entire area. The region around Maastricht and Hasselt forms a dense cooperation node, covering disaster management, environment & water, education & research, culture and job placement. Near Breda and Antwerpen, a large patch of health care and “other” services are located. Other small corridors that could be located are tourism & information in the north-west, the south-east and close to Gent, disaster management near Antwerpen, and “other” services between Gent and Middleburg.

Figure 2.38: Cross-border public services



Geographical extent of cross-border public service themes (2022)

areal | linear | character of the service

- Disaster management
- Health care
- Transportation
- Tourism & information
- Education & research
- Environment & water
- Heating & energy
- Job placement
- Culture

inside / outside (areal) | inside / outside (linear) of the Interreg VI-A perimeter

Cross-border public services covering more than one theme have been assigned only to one. Furthermore, some polygons have been excluded because they were only approximately and not accurately spatially defined.

Level of detail: geolocalised lines and areas
Source: FAU, UPOL, ÖIR & EPRC, ESPON Core-IB, 2026
Origin of data: ESPON CPS, 2022
©EuroGeographics for administrative boundaries

- Interreg VI-A perimeter
- perimeter coastal line
- national border
- NUTS 3 border
- ferry

0 10 20 km

2.6.1.3 Perceived cross-border obstacles in b-solutions

Indicator description

The indicator shows cases of legal or administrative obstacles selected in the framework of the b-solutions initiative. This indicator lists the number, location and nature of suggested solution of cases in the b-solutions initiative, including the topic and parties involved.

- **Source/method of retrieval**: Processing and analysis of the b-solutions initiative data
- **Temporal coverage**: 2018-2025 (first quarter)
- **Unit**: n/a

Please refer to the technical annex for more information.

The b-solutions initiative is a European Union project that supports the resolution of legal, operational and administrative cross-border obstacles. It offers funding for pilot actions and legal expert advice in border regions. A high level of cross-border integration often reveals strong barriers of cross-border functioning. In order to exploit cross-border potentials, these obstacles have to be overcome or at least addressed. Both the number of reported obstacles and the general interest in solutions serve as important indicators of cross-border interaction.

As part of the ESPON CROSSGOV project, all b-solutions initiatives were analysed to deepen the understanding of the thematic focus of the perceived cross-border obstacles across different border regions and the suggested solution, in particular from the European perspective.

In the border area of Belgium–Netherlands, a set of 19 cross-border pilot cases were identified through the b-solutions initiative. These address challenges and proposed solutions across numerous thematic areas, including multilingual online media access, data protection in public health, remote working and taxation, cross-border education and youth mobility, social security coordination in health and employment, environmental cooperation, cross-border emergency services, and institutional frameworks for coordination. Applications were submitted predominantly by EGTCs, and public bodies.

In this border area, transport and mobility-related obstacles concern road transport, urban and sustainable mobility, and cross-border authorisations for transport staff. In governance and institutional cooperation, issues involve administrative procedures, transparency, and planning coordination, especially for environmental and infrastructure projects. Health and social security topics span cross-border health insurance, social security coordination, emergency services, and the reimbursement of medical expenses. Energy and environmental challenges are addressed through projects on renewable energy, recycling, nature and biodiversity, and water supply infrastructure. The labour market and education section include concerns related to remote work, tax treatment, recognition of diplomas, youth internships, and simultaneous employment in multiple countries. Economic development and innovation initiatives cover the implementation of the European Green Deal (e.g., in relation to food systems and the circular economy), digitalisation, entrepreneurship, and the use of EGTCs in subsidy distribution.

The majority of the proposed solutions are hybrid, combining legal, administrative, and operational elements. For instance, the initiative on geo-blocking combines a legal approach by considering EU Directive 2019/789, while also providing an operational solution involving the purchase of a copyright license. The GDPR and public health case combines harmonisation of EU law with Codes of Conduct to streamline data exchange. The home office case proposes administrative adaptations (e.g., redefining workday percentages for tax obligations) along with legal changes to national and EU frameworks. Combinations of revised regulations, bilateral agreements, and better coordination are used to address issues surrounding youth education, internships, and sick pay for cross-border workers.

Environmental and institutional cooperation projects, such as those on manure transport, CO_2 reuse, or freshwater sharing, propose legal alignments (e.g., bilateral agreements, EU or Benelux-level decisions) along with administrative simplification or the creation of new structures (e.g., EGTCs, project-specific committees). Cross-border emergency response involves legal amendments to Benelux decisions, the establishment of coordination offices, and the development of need analyses. Cross-border LEADER projects propose changes to the EU-wide LEADER regulation, as well as operational improvements like umbrella projects and the transfer of authority to a single managing body.

Finally, the implementation of the European Green Deal, particularly in the food and circular economy sectors, includes legal and administrative mechanisms such as mutual recognition schemes, Benelux-level decisions, and clarification of the roles of regional authorities like EGTCs. These cases highlight the complexity of resolving cross-border obstacles, often requiring tailored legal instruments in tandem with flexible administrative and operational solutions.

2.6.1.4 Institutionalised advice centres for cross-border issues

Indicator description

The indicator shows where institutionalised advice centres on cross-border issues are located, including their thematic focus and geographical perimeter.

- **Source/method of retrieval**: Localisation and thematic focus of advice centres for cross-border issues are identified via desktop research.
- **Temporal coverage**: Status as of February 2025
- **Unit**: n/a

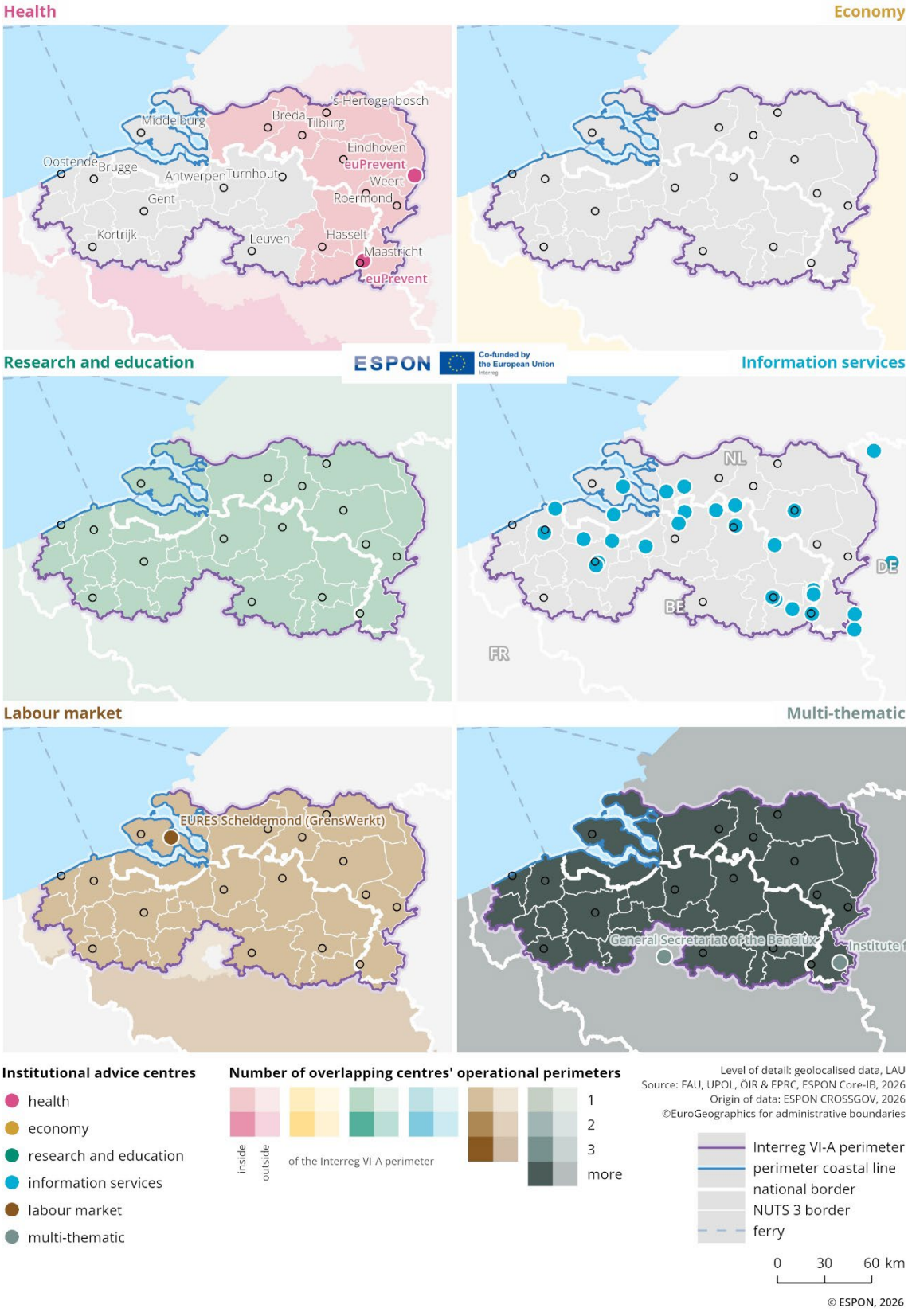
Please refer to the technical annex for more information.

Figure 2.39 shows the locations and types of institutionalised advice centres, along with their operational domains, in this cross-border region. These centres throughout Europe provide support in various fields such as health, economy, research & education, information services, the labour market, and multi-thematic issues. The operational domains of these centres are also indicated by coloured shading on the map. The more intense the colour, the stronger the influence of that specific domain in the corresponding area.

The map illustrates a large number of information service-related institutionalised advice centres located along the border between the Netherlands and Flanders. In the eastern part of the border region, there are also 2 health-related institutionalised advice centres that are part of euPrevent, as well as one multi-thematic institutionalised advice centre called the Institute for Transnational and Euregional Cross-Border Cooperation and Mobility (ITEM).

Multi-thematic, labour market-related, health as well as research and education operational domains are evenly represented in both sides of the border region.

Figure 2.39: Institutionalised cross-border advice centres



2.6.2 Outline of Interreg activities

The following section outlines the key Interreg activities in the 2021-2027 programming period. The aspects included concern the development opportunities and challenges identified (see Table 2), the budget available and split of allocation (Figure 2.40), overlapping Interreg programmes and the key aspects drawn from the programme.

Table 2: Interreg-VI (2021-2027): Opportunities and challenges

Topic	Key development opportunities and challenges identified for Interreg 2021-27
Economy	▪ Prosperous densely populated region ▪ Major European Logistical hub ▪ Newly on an EU external border
Population and Labour	▪ Strong SMEs, but tight labour supply and lower investment ▪ Aging population ▪ Key role of smart specialisation of cross-border relevance
Education	▪ Importance of technological development and education ▪ Access to leading research and KE infrastructure and resources ▪ Highly educated labour force
Environment	▪ Congestion and pollution ▪ Low lying areas coastal with river basin ▪ Vulnerability to sea level rise and flooding ▪ Awareness of role of the region in contributing to climate change ▪ Need to reduce carbon footprint ▪ Improves use of renewables ▪ Pressures on landscape and land use
Tourism	▪ Tourism especially heritage tourism
Coordination	▪ Improving cross-border governance and addressing cross-border obstacles

Total Budget: EUR 410,811,201.56

Figure 2.40: Split of Interreg allocation

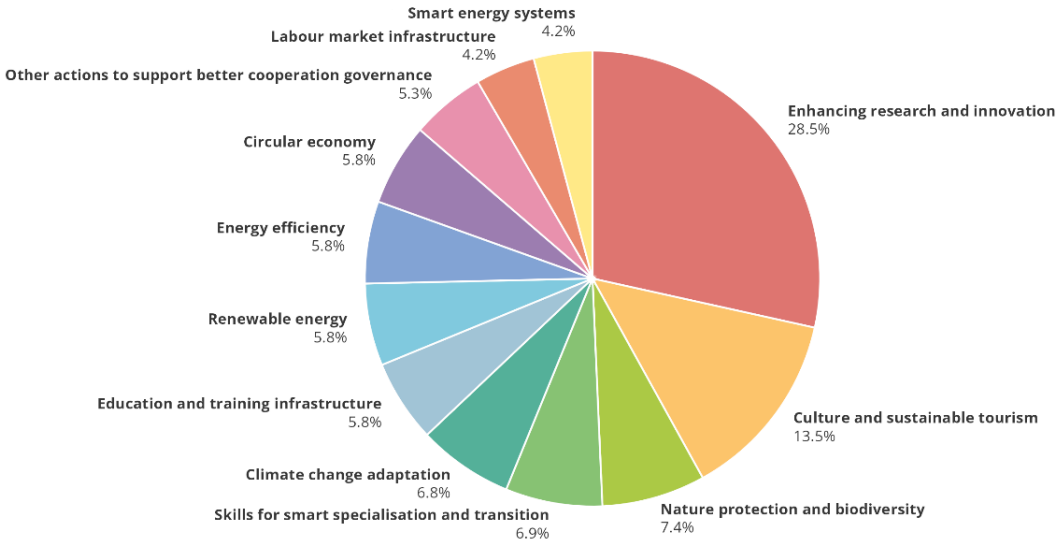


Table 3 shows the number of Interreg 2021-2027 cross-border and transnational programmes which share at least one NUTS3 region with the border area. Each programme has its own distinct rationale, value and territorial focus. However, for the purposes of, for example, planning and capitalisation activities it is potentially helpful for programmes and programme stakeholders to be aware of and connected to other Interreg programmes with which they share a direct territorial link.[16] The 4 Interreg C programmes Interreg ESPON, Interact, Interreg Europe and URBACT cover the whole EU territory and provide a range of joint services and initiatives.

Table 3: Shared geographies with other cross-border and transnational programmes

Interreg A (cross-border)	Interreg B (transnational)
3	2

Key aspects

- Strong focus on promoting joint activities in the field of innovation, sustainability, the la-bour market and sustainable tourism.
- Territories in the programme area also participate in the Interreg B programmes North Sea and Interreg North West Europe, as well as in the Interreg A programmes Belgium-France, Euregio Meuse-Rhine, and Germany-Netherlands.

[16] It is noted that synergies and links with a wide range of other territorial cooperation and sectoral programmes and initiatives are also valuable and this is reflected in the wider analyses presented in this border profile, but not specifically covered in this table.

2.6.2.1 Interreg cooperation

Indicator description

Based on the keep.eu database, this indicator illustrates the network density of Interreg V-A (2014–2020). It is derived from the geographical location of all partners within a project consortium and reflects the intensity of cooperation between them. For the analysis, project networks were visualised by drawing lines between the locations of partners within a consortium. These connections were subsequently aggregated and spatially abstracted by calculating line density using GIS software. Dark red areas indicate a high density of connections between project partners, while yellow areas represent a lower density of cooperation links.

An additional element in this section is the development of project partner numbers between Interreg IV-A (2007–2013) and Interreg V-A (2014–2020), based on data from the keep.eu database. The datasets were cleaned to remove duplicates, using the partner names as reported in keep.eu. For both programming periods, keep.eu indicates a high level of data completeness.[17] Nevertheless, this development should be interpreted as indicative, as variations in partner name reporting and general limitations regarding the representativeness of the dataset affect the robustness of the results.

- **Source/method of retrieval**: Processing and analysis of the keep.eu database
- **Temporal coverage**: 2007-2013 (Interreg IV-A), 2014-2020 (Interreg V-A)
- **Unit**: n/a

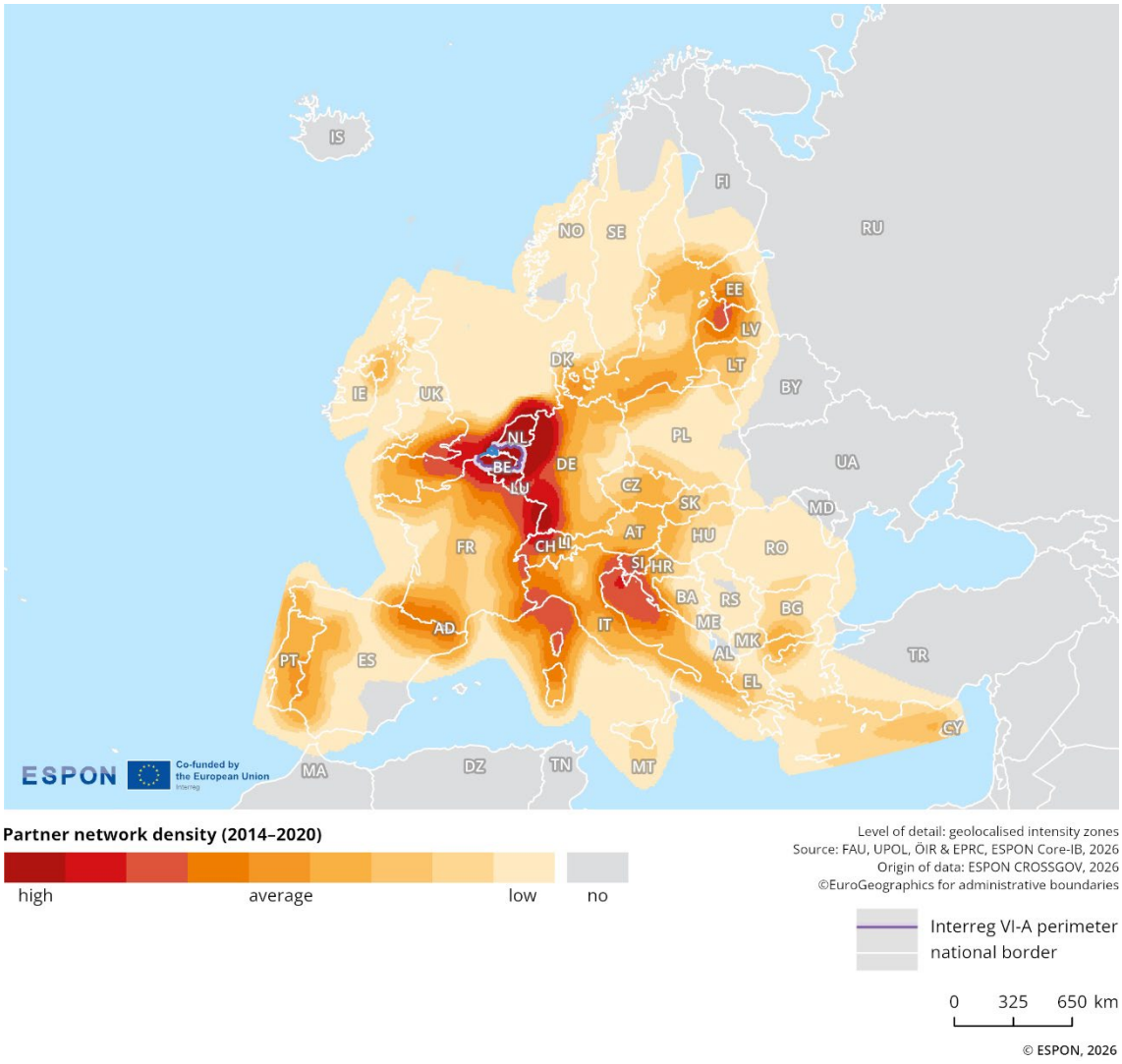
Please refer to the technical annex for more information.

Cooperation activities and networks are among the most meaningful types of information for delineating cross-border functional areas. As such, the indicator on cooperation through Interreg can help to identify networks among cross-border actors and highlight the density of cooperation in specific border segments.

Figure 2.41 shows the density of Interreg V-A (2014–2020) partner networks. The indicator includes the location of, and links between, Interreg project partners within a project consortium. From a European perspective, partner network density in the Belgium-Netherlands border area appears quite evenly spread. The programme area has a particularly high level of partner network density. Overall, the partner network density in this border area is significantly higher than the European average. Based on the keep.eu database and excluding duplicates, the number of project partners increased from 428 in Interreg IV-A (2007–2013) to 860 in Interreg V-A (2014–2020), an increase of about 100%. It is important that these changes are considered in the context of factors such as change in programme budgets between 2007-13 and 2014-20, emphasis on targeting impact, and the number of strategic projects.

[17] see Keep.eu representativeness: Interreg, Interreg-IPA and ENI cross-border

Figure 2.41: Interreg V-A partner network density



2.6.3 Key messages on the governance dimension

Both the Netherlands and Belgium are part of the Benelux union, an organisation in the forefront of European integration. In addition to its competences, the union and the participating areas are strongly engaged in cross-border cooperation, including the creation of legal tools to facilitate cross-border co-operation.

The multi-level governance structure along the borders of this programme area shows broad spatial coverage. Overall, the region exhibits high levels of cooperation along its national borders, including Euroregions and EGTCs.

Cases of cross-border public services between Belgium and Dutch territories are concentrated in the Maastricht area and around the central to western part of the border region. Transportation is a key theme, especially in the central border region, the western border region and in the Maastricht area. Tourism & information services are another key area of attention. The region around Maastricht and Hasselt forms a dense cooperation node. Near Breda and Antwerpen there is also a concentration of cooperation on healthcare and “other” services.

19 cross-border pilot cases were identified through the b-solutions initiative. These address numerous thematic areas, including multilingual online media access, data protection in public health, remote working and taxation, cross-border education and youth mobility, social security coordination in health

and employment, environmental cooperation, cross-border emergency services, and institutional frameworks for coordination.

Interreg exchanges have a strong focus on promoting joint activities in the field of innovation, sustainability (energy, climate, circular and biodiversity, tourism), the labour market. Territories in the border region also participate in Interreg B: North Sea and Interreg North West Europe Programmes; and Interreg A: Belgium-France, Belgium-Germany-Netherlands, Germany-Netherlands. From a European perspective, the border region demonstrates a high and relatively evenly distributed density of partner networks.

3 Summary and key observations

To support the strategic dialogue on cross-border cooperation beyond 2027, this territorial analysis provides harmonised and comparable information. Its data-driven evidence helps to inform the future direction of cross-border cooperation by facilitating alignment with EU priorities and the evolving regulatory framework. The Core-IB border profiles adopt a harmonised methodology and provide programme areas with access to recent European data. As this approach comes along with limitations, member states may hold additional or more detailed data which can further enrich or contextualise the findings beyond the Core-IB project (see final report and technical annex of this project). These national sources are essential for refining and validating territorial evidence in policymaking processes, including: a) regional, fine-scale data and b) insights from political processes related to prioritisation and objective setting. The study's findings are analytical and are intended to support reflection and discussion. They do not create regulatory or policy obligations for Member States, the European Commission, or programme authorities.

Table 4 provides 2 types of information. Firstly, it summarises the key analytical findings for the border region, as discussed earlier in this profile. Secondly, it suggests policy options based on the analytical findings. These options are intended to provide a practical and informative basis for the strategic dialogue among programme bodies, managing authorities and the European Commission.

Generally speaking, the aim of cohesion policy is to promote harmonious territorial development (also) across borders. The objective is to mitigate the impact of borders and achieve 360° functionality, thereby enhancing the quality of life and fostering prosperous development on both sides of the border. The upcoming Interreg period offers an opportunity to address these objectives and potentials through targeted cooperation projects.

Table 4: Evidence-based conclusions

Territorial dimension	
Key analytical findings	• This border area is the most densely populated cross-border region in the EU with the highest number of settlements; • In an already densely populated area, population and settlement growth in the area underline the importance of coordinated approaches to planning for the future; • Population shifts, particularly the increasing population over 65, impact on development, accessibility and service provision and are shared development issues on both sides of the border.

Territorial dimension	
Policy options	**Cross-cutting aspects** • A focus could be on coordinated cross-border planning efforts that contribute to safeguarding quality of life and ensuring the effective delivery of services, particularly in the densely populated areas; • Cooperation projects could address balanced approaches to sustainable development and environmental as well as biodiversity protection in those areas where land fulfils multiple and competing functions, including urban development, agriculture and ecosystems; • The anticipation and response to the territorial evidence on demographic and labour market challenges, notably those linked to a growing share of the population aged 65 and over.

Economic dimension	
Key analytical findings	• GDP per capita on both sides of the border exceeds the EU average, with comparable growth trends; • The border region's economy is strongly shaped by industry, services and public sectors, which together account for more than half of total GVA. This concentration highlights the importance of fostering innovation, labour market resilience, and sustainability within these key sectors. Sectoral similarities and strengths highlight the potential for innovation and leadership in the fields; • Employment levels within the area are more variable and the area has experienced a moderate decrease in the share of working-age population, which has implications for labour markets and access to labour in the future; • Nominal pay levels vary across the border, with higher rates in Belgium. However, caution is needed in interpreting this as a key driver of labour mobility, given higher labour costs in Belgium/Flanders. Housing prices are relatively balanced across the border region, but higher prices in several urban centres point to emerging affordability pressures; • There is relatively strong cross-border commuting activity in areas directly adjacent to the border. This is further assisted by participation in the 2023 Framework Agreement on Cross-Border Telework and could be facilitated in the future.

Economic dimension	
Policy options	**Competitiveness related aspects** • The consolidation and further development in innovation and research, including the strengthening of cross-border innovation ecosystems in key sectors; • Strategic cross-border labour market cooperation could support responses to the evolving skills needs, ensuring access to skilled labour while contributing to sustainable and inclusive economic development objectives; • Cross-border policy approaches may build on the existing commuting and telework patterns in border-adjacent areas, while carefully accounting for wage differentials, labour costs and housing pressures. **Cross-cutting aspect** • Integrated cross-border planning can enhance the overall attractiveness of the cross-border area for both businesses and residents.

Green dimension	
Key analytical findings	• Protected areas within the cross-border region are concentrated and linked in many areas in the eastern and coastal areas; • A shared challenge is how to balance development and environmental protection/improvements in the future; • As an indication of environmental pollution levels, air pollution levels show a wide range and are above EU average on both sides of the border; • In terms of environmental hazards, the threat of sea and river flooding in the region is widespread and an important area for cooperation. There is a clear need for ongoing cooperation to address these risks and climate change more generally; • The cross-border region features extensive high- and extra high-voltage energy infrastructure, with potential for cooperation energy distribution, efficiency and transition; • Resource productivity (in PPS) exceeds the European average, highlighting a strong foundation for advancing circular economy initiatives in the border region.

Green dimension	
Policy options	**Environmental aspects** • Cooperation projects could address common environmental risks, such as flooding, through coordinated prevention, management, response and recovery measures; • A focus could be on resource productivity and energy as well as resource efficiency, enabling more tailored and better-coordinated green transition pathways. **Cross-cutting aspect** • Cross-border cooperation could help to balance the economic development pressures with environmental protection needs in densely populated areas, including the maintenance of coastal protection functions; • The high functional integration along the border provides a basis for strengthening cooperation in the circular and green economy; • The improvement of green transport solutions, including cross-border public transport options, while supporting labour mobility.

Socio-economic dimension	
Key analytical findings	• The intensity of social media connectivity across the border is uneven, suggesting that socio-cultural links, and the potential for deeper social and cultural integration, vary across the border region and are stronger in certain areas; • For tourism measures, there are high intensity of overnight stays in coastal regions, but overall, the average for the programme area is lower than the European average; • Essential services such as doctors, pharmacies, schools, and grocery shops are evenly distributed across most areas in both countries.

Socio-economic dimension	
Policy options	**Social aspects** • The strong socio-cultural integration in parts of the territory can be leveraged to strengthen wider cross-border cooperation in labour markets, education and service provision; • Cross-border initiatives could focus on deeper social and cultural integration, particularly in areas where cross-border connectivity remains comparatively weaker. **Cross-cutting aspects** • The balance of sustainable tourism development with coastal management and protection in coastal areas; • Cross-border tourism management strategies could ensure that tourism generates tangible benefits for local communities, while reducing pressure on highly frequented 'honeypot' destinations; • A focus could be on cooperation on services and the digital transition to improve efficiency and effectiveness, especially in the context of ongoing demographic change.

Border security and safety dimension	
Key analytical findings	• From a comparative perspective, both countries have had controls in place for several days; • Belgium's border controls were mainly due to the pandemic, but the Netherlands began controlling migration flows in 2024, indicating an unequal impact on cross-border movement in one direction.
Policy options	**Cross-cutting aspects** • The impacts of border controls on cross-border commuting and logistics can be mitigated through coordinated and institutionalised cross-border policy dialogue; • The mitigation of border control effects can form part of cross-border cooperation projects in various sectors. Economic networks, transport infrastructure initiatives and tourism-related actions can incorporate considerations related to the impacts of border controls.

Governance dimension	
Key analytical findings	• Both the Netherlands and Belgium are part of the Benelux union, an organisation in the forefront of European integration; • The region exhibits high levels of cooperation along its national borders. Some of the most widespread are at Euroregion level and EGTCs; • The development of cross-border public services is well advanced, with geographic clusters and concentrations of sectoral cooperation; • Work on b-solutions highlight the potential for more cooperation and the presence of barriers to address on a wide range of issues; • Interreg intervention have had a strong focus on promoting joint activities in the field of innovation, sustainability, the labour market and sustainable tourism; • Partner network density is evenly spread, and the area has a particularly high level of cooperation.
Policy options	**Cross-cutting aspects** • The coordination across the full range of cross-border cooperation initiatives could maximise synergies, complementarities and overall territorial benefits; • The well-established cross-border cooperation traditions and frameworks can be further built upon to widen and deepen their role and impact, including in support of cross-border functional regions and emerging cooperation themes; • The high level of integration within the Benelux area offers opportunities to identify, test and share transferable lessons for other cross-border contexts.

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ESPON 2030

ESPON EGTC
11 Avenue John F. Kennedy
L-1855 Luxembourg
Grand Duchy of Luxembourg
Phone: +352 20 600 280
Email: info@espon.eu
www.espon.eu

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