

*Business and Opportunities
In the Øresund Region*

About the term "Øresund"...

Øresund is the Scandinavian name of the strait between Denmark and Sweden. The English term for this body of water is simply just "the Sound", which conciseness one might speculate, perhaps is a reflection of its commercial importance. After all, Øresund is one of the busiest shipping lanes in the world. In any case, the Øresund region consists of the landmasses on either side of this strait, namely the Swedish county of Scania (Skåne) and the majority of the Danish island of Zealand (Sjælland).

... and what about that strange letter "Ø"

People who do not speak any of the Scandinavian languages may find the letter "Ø" somewhat peculiar. Scandinavians are, of course, aware of this and for simplicity therefore often use the more conventional "O". However, since the letter itself has taken on sort of a symbolic meaning for the transnational integration and cooperation that is now picking up momentum in the region, we have chosen to use it throughout this report. It is pronounced [ɜ:], similar to for example the "e" in "sterling".

Foreword

This report contains facts about the Øresund region from an enterprise perspective. Special attention has been given to factors that are most relevant to companies wishing to establish a presence in a new region. The document is intended to be used both as a practical compilation of facts for companies that are considering to set up operations in the region, or for companies already with a presence here but which are looking to expand their activities in the region. The report also serves as factual background material to the media, students and to people who just simply want to learn more about the Øresund region. The author of the report is Senior Analyst Henrik Andersson. Therése Persson, MBA, and Fredrik Larsson, MSc, have carried out updates and made some further additions.

The Chamber of Commerce and Industry of Southern Sweden are happy to provide further information, lectures, *etc.* in order to assist parties mentioned above. Feel free to quote us, but please do not forget to state your source.

Since 1999 the Chamber of Commerce and Industry of Southern Sweden works in collaboration with the Danish Chamber of Commerce in the so-called Øresund Chamber of Commerce and Industry.

Malmö, June 2005

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1 Introduction

ALONG WITH THE CONSTRUCTION and grand opening of the Øresund fixed link followed an intense media focus on the potential that lies embedded in the integration between the Copenhagen region and Scania. An integrated Øresund region has a formidable international competitive strength, and will most likely become one of the dominant regions in Europe. Professor Wichmann Mathiessen at the University of Copenhagen has summarized the region's strong points as follows.¹

- A strong and competitive economy characterized by a high degree of efficiency, a high educational level and an innovative business climate.
- Excellent public institutions of higher education and for the cultural life.
- First rate terminals and outstanding international and domestic communications.
- A healthy social environment and a high welfare level.
- Residential areas of a very high standard and a sound physical planning.
- A living environment and natural surroundings of unique qualities.

”... [the fixed link ties] southern Sweden to the continent of Europe for the first time and create[s] a new European trade and marketing center surpassing Stockholm and equal to cities like Berlin, Zurich and Amsterdam”

*The New York Times*²

Apart from offering physical access to the expanding Baltic market, the Øresund region is in itself northern Europe's largest market. The 3.6 million inhabitants, almost 25 % of Sweden and Denmark's population, constitute a solid foundation for the formation of a region with an exceptional growth potential and strong investment pull. Unlike many other growth regions, problems concerning the environment and communications are being kept to a minimum, while prices remain at a reasonable level. Altogether, this makes the Øresund region the most dynamic in northern Europe and a very attractive place to do business. The table below shows how well the Øresund region does in a Nordic and European comparison. ■

Some statistics about the Øresund region

The comparison below is based on the latest available material³

Factor		Rank among Nordic regions	Rank among European regions ⁴
Area	21,000 km ²	–	–
Population (2003)	3.6 million	1	27
Gross regional product (2001)	110,400 million Euro	1	11
International flight destinations (2004)	Number of passengers		
	18.1 million	1	9
Scientific strength (Published articles in scientific journals 1996-1998 in the fields of medicine, the natural sciences and engineering)	Number of articles 23,792	1	6
Students enrolled in higher education	140,000	1	n/a

Sources: Statistics Sweden and Statistics Denmark, Ørestat, Copenhagen Airports, DTU Analysis & Research Promotion Center (1999)

2 The Attractive Force of the Øresund Region

2.1 Significant Factors for Company Establishments

DIFFERENT INDUSTRIES AND COMPANIES, and perhaps also specific divisions within companies, have different aspects and conditions to take into consideration in decisions regarding new establishments or relocations of certain corporate functions. Today, improved communications and transports make it easier to choose the most optimal location in such decisions. A manufacturing company might, for instance, look for an area that enables efficient transports of goods and where property prices are low; while a knowledge intense service oriented company (or the R&D department of the manufacturing company) might opt for adjacency to universities, and give priority to convenient passenger travel.

A great number of studies have been undertaken in order to investigate what factors are of importance to company relocations and establishments (enclosure 1). Below, we have summarized the main results of such studies in tabular form in order to obtain an overview of what those factors are and their relative importance.

The remaining sections of this chapter describe how well the Øresund region fulfils the requirements of these factors. In addition to this, a subchapter will also be devoted to information technology and telecommunications; factors which are becoming progressively more pivotal for companies to consider.

Important factors in establishment and relocations decisions.

The number in the table denotes how important the factor is assessed to be in each study.

Factor	European Banking Union (6 factors)	Invest in Sweden Agency (6 factors)	Stockholm City Council (6 factors)	OECD (10 factors)	Healey & Baker (10 factors)
Infrastructure/Transports	1	2	5	6	2
Business conditions	5 and 6	4 and 5	2	8	5
Labour force, supply and skill level	4	-	3	1 and 2	4
Market proximity (suppliers, customers)	-	3 and 6	-	7	1
Quality of life (cultural life, nature, cost of living)	2	1	4	3 and 10	9 and 10

2.2 Infrastructure and Transports

- The demand for convenient passenger travel and efficient goods transports is ever increasing; among other things as a consequence of globalisation and the implementation of new strategies for logistics.
- The Øresund region has a highly advantageous geographical location.
- Copenhagen Airport is the largest airport in the Nordic countries, the second largest in Swedish domestic air travel, and is rated as one of the best airports in the world.
- Particularly Malmö-Sturup Airport, but also Kristianstad Airport and Ängelholm/Helsingborg Airport, are main airports in Scania.
- Three of Sweden's five biggest ports for shipping can be found in Scania.
- Helsingborg Port is one of the busiest ferry ports in the world.
- Danish logistics are among the most sophisticated in the world, and Sweden is rated among Europe's top nations in this field.

A Gateway to the Baltic

Technological advances in information technology and communications in general, the EU membership and the associated harmonization process, increased globalisation, and the deregulation of national markets are all factors which enables companies to locate more freely to where business conditions are most optimal to them. Parallel to these developments, the importance of a well-functioning infrastructure and efficient communications becomes increasingly apparent. This applies to the transport of goods as well as to passenger travel. Geographically speaking, the Øresund region is located in a very central position, particularly if we consider the expanding markets of Eastern Europe. The region is a natural gateway to the entire Baltic region, while it at the same time offers excellent transport links to the rest of Europe and to the world. The rich variety of transport and communications alternatives in the region satisfies both the requirements of cost-efficient shipping and swift easily accessible passenger travel.

”Malmö is strategically located for our shipments to the rest of the Nordic countries and to the Baltic States, Poland and Russia”

Patrik Nyholm, Technical Director, Acerinox⁵

The Necessity of Efficient Transports

The demand for efficient goods transports rises as consequence of a multitude of factors. One such factor is that the Just-In-Time principle nowadays can be implemented as a global strategy due to improved inter-continental communications. On top of this, the net value of transported goods is steadily rising, which means that the costs for capitalization also have an upward tendency. As an example it can be mentioned that the discounted present value of transported goods between Sweden and the rest of the EU has risen by more than 100 % since the early 1970s until 1996.⁶ Partly as a result of this increase in value we can see that the trend in logistics is tending towards mobile warehousing. This is done in order to minimize transport time and to reduce the need for storage facilities. With a steady growth in e-commerce, and with transportation costs accounting for nearly 40 % of a good's price compared to today's 10-20 %, efficient transports will become an even more vital factor in the future.

We Travel More

Travel in general, and particularly international travel, tends to increase both in frequency and range. For example, since 1980 we have seen annual overall increases in infrastructure projects related to physical

communication amounting to 2.4%.⁷ Information technology stimulates new contacts being made, which in turn results in more personal meetings. Thus, contrary to what some claim, IT boosts travel rather than reduces it. The globalisation of commerce, business and markets, also provides an injection to our travel habits. Invest in Sweden Agency has studied why companies relocate abroad and among other things concluded that the management of larger corporations and their subdivisions nowadays seldom are stationary at one location, but instead mobile for the majority of the time. A consequence of this can be that a city like Stockholm is perceived too peripheral to function as an effective headquarters for a multinational corporation.⁸ The many mergers and acquisitions that are characteristic to both mature and emerging markets also affect travelling; transnational mergers obviously intensify international contacts between different corporate divisions.

International Airports

The Øresund fixed link has provided the regional economy with easy access to a large number of airports. Being northern Europe's overwhelmingly largest airport in terms of international connections, Copenhagen Airport is of course the most frequented of these. All in all, it offers 120 international destinations.⁹ Furthermore, Copenhagen Airport is second largest in Swedish domestic air travel. As of today, it frequents ten destinations in Sweden, with about 50 take-offs per day.¹⁰ The total number of passengers for 2004 exceeded 19 million.¹¹

In an IATA survey from 2004, Copenhagen Airport was rated as Europe's best airport.¹² Prior to that prestigious award it has also been recognized as the world's best airport,¹³ and it ranks among the absolute elite when it comes to goods transferring with an average handling time of three hours. All in all, 336,000 tonnes is transferred annually. The airport has recently also won recognition for its efficiency by the Air Transport Research Society (ATRS), which rated it number one in Europe.¹⁴ Moreover, Copenhagen Airport has the fewest delays and traffic disturbances in all of Europe¹⁵ and offers the third best airport shopping in the world. It also has the best passenger facilities, and the third best selection of restaurants.¹⁶ Put briefly, Copenhagen Airport is simply world-class.

”What you gain is a stronger economy and quicker service to the customers – both in Denmark and southern Sweden”

*Carl Viggo Östlund,
Managing Director of TNT Scandinavia¹⁷*

The second largest airport in the region is Malmö-Sturup Airport. With more than 1.7 million passengers each year¹⁸ the airport has seen a very strong development in passenger numbers over the last couple of years. Even if we take into account the temporary decline that occurred after the 11th of September 2001, the number of passengers has grown by 14 % from 1999 until 2004. This positive trend is likely to continue in the future, among other things due to the enlargement of its customer base, which is a direct consequence of Øresund fixed link. The airport's geographical location has also meant that a number of carrier companies nowadays uses Malmö-Sturup as their regional hub for flight operations, among these are TNT and UPS. Besides Malmö-Sturup Airport there are two additional commercial airports in Scania: Ängelholm/Helsingborg Airport and Kristianstad Airport.

Highly Developed Port Services

Besides its excellent air transport capabilities, the Øresund region also has a port service of absolute top-class. The merger between the two ports of Copenhagen and Malmö into Copenhagen Malmö Port has created the largest port in the Nordic countries, measured in the volume of transported goods. The annual turnover is more than 14 million tonnes.¹⁹ Trelleborg is another significant port in Scania. The annual goods turnover there corresponds to an entire 15 % of the total value of Sweden's foreign trade.²⁰ In addition to this, Helsingborg is one of the busiest ferry ports in the world, with about 12 million passengers each year.²¹ Taken together, this means that three of Sweden's five biggest commercial ports are located in Scania.²² Hence, if we ignore oil shipping, more goods pass through the ports in Scania than Gothenburg Port.

A Logistics Hub

Because of its geographical location and its excellent communications, the Øresund region is a perfect logistical hub for the entire Baltic region. The Danish goods handling/logistics are rated third in the world after Singapore and Bavaria.²³ In another market analysis, Sweden is ranked third in Europe in this field.²⁴ Scania is the natural transit region for a very large share of the flow of goods that enters and exits Sweden, and a considerable portion of Sweden's exports travel via Scania.²⁵ This in concert with among other things the strong regional concentration of the food industry, has further enhanced Scania's transports and logistical capabilities. 20 % of Sweden's road carriers are located in Scania (this compares to 11 % of the population).

"Many companies have started to look at the Nordic countries as one market, and the gateway to that market is Denmark and southern Sweden"

Per Olsen, Director of Nordic Operations, DFDS Transport²⁶

2.3 Business Conditions

- The Øresund region offers two sets of business conditions for a single market.
- Favourable property prices and rent levels.
- Venture capital is plentiful in the Øresund region.

"We get a natural head start compared to our European competitors, which still struggles with national borders"

*Jonas Gulliksson
Managing Director, Ström & Gulliksson²⁷*

Two Countries – One Market

What distinguishes the Øresund region from national regions is its ability to offer two different sets of business conditions. This means that companies can locate to the country that best suits their needs, whilst maintaining access to the entire market. To mention one example, property prices are considerably lower in the Swedish part of the region. This means that companies that require a lot of physical space for their operations can minimize their direct investment costs by locating to Scania. For companies looking to expand their premises quickly, the Swedish bureaucracy for building permits is more decentralized and therefore more flexible and quicker than the Danish. Companies that wish to move into already existing premises will find that even in Copenhagen the rent level is very low compared to other metropolitan areas. The table below lists costs of first-rate office space in a selection of cities.

Rent levels for first-rate offices²⁸

City	Annual cost per square metre (2003)
Stockholm	€ 355 – 435
Copenhagen	€ 300
Malmö	€ 190

The yearly rent for a first-rate office in Copenhagen is about € 300 per square metre, which is the lowest for all of Europe's capital cities. The rents in Malmö have risen due to the increased popularity of the Øresund region, but they still remain fairly modest. Swedish

Property Index for 2003 shows that the sublet market for office space is the property market in Sweden that yields the highest total revenue, *i.e.* that the property stock is valued high.²⁹

Companies facing a strongly fluctuating demand, for example such companies that are heavily dependent on the business cycle or from initiatives by the public sector, can benefit from having a labour force that can be varied in size. Such companies can take advantage of the liberal Danish labour market legislation. In 2004 Denmark was ranked seventh worldwide in terms of international competitiveness (Sweden was ranked eleventh).³⁰ Furthermore, companies with tight profit margins due to for example a highly competitive market can benefit from the Swedish corporate taxation rate, which is the fifth lowest among the OECD countries.³¹

Knowledge, Communication and Capital

Close proximity to Copenhagen Airport and access to institutions of higher education mean that the Øresund region is an excellent place to set up operations for internationally focused companies in the service sector. Firstly, there is a great demand for services in the region itself. Secondly, the supply of skilled labour is bountiful. Thirdly, international communications are excellent. Right now, we can also see that service oriented companies in the region are growing considerably in numbers.³² The integration process is also giving Scania access to the venture capital industry located in Copenhagen. The number of venture capital firms in Denmark has more than doubled since the mid-1990s,³³ and as much as 80 % of Denmark's companies in this sector are located in Copenhagen. Furthermore, the planned merger between the exchanges in Stockholm and Copenhagen will position the region within the largest securities market in northern Europe.³⁴

In the Start-Up Index of the Jobs & Society Foundation, Scania makes a strong impression and accounts for figures clearly above the national average for the first third of 2004. An example of this is that the number of joint-stock companies grew by 11.4 % during the period January through April, compared to the same period the previous year. The corresponding national figure was 3.6 %.³⁵

2.4 Access to Skilled Labour

- An increasing number of people are working with knowledge and information, and with services, while fewer are involved in physical production.

- The labour force in the Øresund region exceeds 1.8 million people.
- There are more than 20 institutions of higher education in the region.
- 140,000 students assure a continuous renewal of the skilled labour force.
- More than 12,000 researchers are engaged within the framework provided by the Øresund University.
- Proximity to 15 international schools.
- Eight MBA programmes in the region.
- More than 300,000 people of foreign descent.

Knowledge and Information Grows in Importance

An increasing number of people are working with knowledge and information, or within the service sector; fewer are involved in actual physical production. The concept *knowledge and information* encompasses research and development, marketing and advertising, financial services, *etc.* In 2010, according to forecasts, 50 % of the labour force will be working with knowledge and information, and about 40 % with services; only 10 % with physical production.³⁶ This development, in conjunction with a heightened level of global competition, means that a greater proportion of a product's value will be created through knowledge-intensive work in the future. Having this said, it becomes obvious that every company will be very dependent on skilled and innovative workers for their success. In the traditional manufacturing industry, the individual employee could hardly affect the performance of the company at all. However, in the new knowledge-driven society the efforts and ideas of a single individual can greatly influence how well a company does.

An Attractive Labour Market

The integration process brings numerous advantages to companies wishing to recruit more staff. Studies indicate that as much as 90 % of all staff recruitments are made among people already residing in the region.³⁷ Because of the fixed link and the ample alternatives available to commuters, companies are now granted access to a larger pool of skilled labour than before. This reduces the risk of bottlenecks in production. The dynamics of the region most likely also help attract staff from abroad. Today, the labour force in the Øresund region amounts to 1.8 million people.³⁸

In order to attract foreign labour, it is crucial to be able to offer schools with international curricula. In

Copenhagen alone, there are ten international schools. On the Swedish side, apart from the ones already in place in Helsingborg and Malmö, new international schools are also in the planning stages in Lund and Kristianstad. Within the framework of the Øresund University, 14 universities are cooperating on both sides of the strait, organizing 140,000 students and more than 12,000 researchers.³⁹ On top of this, there are several other institutions of higher education, specialising in a variety of fields.

To safeguard the opportunity of advanced further education, there are eight MBA programmes available in the region, both general and highly specialized ones. Overall, the various educational programmes are considered to be of a very high standard, and since a couple of years back both the Copenhagen Business School and the School of Economics and Management at Lund University have won Equis (European Quality Improvement System) accreditation.⁴⁰ The Scandinavian International Management Institute (SIMI) is another example of an educational institution that offers both diploma courses and MBA programmes.⁴¹

International Labour Force

The Øresund region is multicultural and has the highest percentage of immigrants of all Nordic regions. In Copenhagen and the south-western parts of Scania alone, there are 300,000 people of foreign descent.⁴² This means that a high percentage of the people residing in the region have international experience and are multilingual.

2.5 Market Proximity and Size

- 3.6 million inhabitants.
- 170,000 companies.
- Proximity to the Baltic market.
- One of Europe's highest gross regional products per capita.

Increased competition – a consequence of the globalisation process – means that products tend to get more specialized in order to distinguish them. This, in turn, necessitates that the market is big enough to sustain a profitable level of demand for highly specialized products, which often have significant development costs attached to them. With 170,000 companies and 3.6 million people generating a strong purchasing power, the Øresund market fulfils these requirements. Also, the migration to the region is

extensive, which has the dual effect of providing additional labour and enlarging the market.

The region's geographical location makes it an ideal place from which the entire Nordic market and other markets around the Baltic can be reached. The countries in Eastern Europe have experienced a favourable development, which is assumed to stretch out over a long period in the future as well. This assessment is based on, among other things, the sizeable Danish and Swedish investments made in the Baltic States. The advantages of the region's geographical location are also beginning to attract company headquarters. The Øresund Institute has conducted a study of the largest 102 companies in the world and found that 26 of these have located their Nordic or Scandinavian headquarters to the region. This corresponds to an increase of more than 100 % since 1997.⁴³

Productivity in western Scania and the Copenhagen region is very high, and with a regional economic growth rate that surpasses both the Swedish and Danish national growth rates, the Øresund region is definitely one of Europe's strongest regions.⁴⁴

2.6 Quality of Life

- Quality of life becomes an increasingly significant factor as the well-being of employees grows in importance to companies.
- One of the most museum dense areas in the world.
- World-class libraries.
- The Roskilde Festival is Europe's biggest music festival, and Copenhagen Jazz Festival attracts musicians from all over the world.
- 563 preserved medieval churches.
- 25 % of Sweden's bathing beaches can be found in Scania.
- More than 90 golf courses, of which more than 50 are located in Scania.
- Sweden ranks among the top 3 countries in the world to live in.
- Copenhagen is one of the most popular congress cities in the world.
- Reasonable property prices and high standard residential dwellings.

Popular Tourist Destination

As stated earlier, employees are becoming an increasingly important factor for companies. This means that employers will become ever more eager to offer a pleasant living environment with easy access to culture, nature and recreation. A sound living environment often walks hand in hand with tourism and the leisure industry, and in this aspect the Øresund region really stands out. Over the next decade tourism is believed to become the fastest growing industry around the world, and in the Øresund region the number of hotel nights – a measure of the occupancy rate of hotels – has increased by 16 % from 1997 until 2002.⁴⁵ If we study the period 1997-2003, Malmö ranks among the top 10 cities with respect to the number of hotel nights compared to its European competitors.⁴⁶ The tourism industry already has a turnover of about 3.1 billion Euro and employs more than 43,000 people, which corresponds to about 2.5 % of the total labour force.⁴⁷ Zealand and Scania together offer more than 40,000 hotel beds distributed on 360 hotels. For visitors with lower demands on comfort, there are more than 100 caravan sites, and more than 50 youth hostels.⁴⁸

Copenhagen is also a popular host city to congresses. The Danish capital ranks fifth on the list of the world's most popular congress cities, and when it comes to quality Copenhagen is leading in Europe.⁴⁹ One reason behind this success is Bella Center – Scandinavia's largest expo and congress centre – located in the new area called Ørestad, which lies in connection to the Danish bridge-abutment.⁵⁰

”...[The Øresund region] is as large a trade and marketing centre as Amsterdam or Berlin. It is growing at a clipping rate and is set to attract the brightest of Europe's young people with its easy facility for English, its good air and rail links, relatively cheap housing and beautiful, uncommercialized countryside and beaches within a half hour's reach”

Jonathan Power, columnist at TFF⁵¹

Denmark also offers world-class recreational activities for the entire family. For example, the prestigious Forbes Magazine rates both Tivoli and Legoland among the 12 best amusement parks in the world.⁵² Copenhagen has also recently been selected as the world's finest cruise harbour.⁵³

Cultural Activities

The cultural sector in the Øresund region employs about 40,000 people,⁵⁴ and an additional 25,000 work in

industries related to this sector. Taken together, they make out 4 % of the total labour force. The region is also one of the most museum dense in the world. The table below contains an inventory of the various types of cultural institutions that can be found in the Øresund region:

Cultural institutions in the Øresund region, 1997⁵⁵

	Copenhagen	Scania	Øresund region
Theatres	45	16	61
Museums	79	28	107
- art museums	15	8	23
- historical museums	64	20	84
Art galleries	60	70	130
Libraries	170	170	340
Cinemas	46	21	67
Symphony orchestras	4	2	6
Art schools	8	5	13

The 340 libraries in the Øresund region are frequently visited, and the number of library loans per person and year is among the highest in the world.⁵⁶ Music is also given a central role in the cultural life of the Øresund region. Each year the Roskilde Festival – Europe's biggest music festival – attracts more than 75,000 visitors.⁵⁷ Another major event is the Copenhagen Jazz Festival, which runs for ten days in the month of July, hosting more than 450 concerts. In Copenhagen, the visitor can also enjoy grand stadium concerts, as world-renowned performers often include the capital on their tours.

Rich History and Beautiful Sceneries

The Øresund region has a rich history, which among other things is manifested in the 563 preserved medieval churches and the nearly 5,000 registered burial-mounds dating from the Stone Age and the Bronze Age, not to mention the region's profusion of castles and manors.⁵⁸

Those who need a break from culture and history need not worry; with more than 25 % of Sweden's bathing beaches located in Scania, the region can also be a sunbather's delight.⁵⁹ Overall, the natural surroundings that the region has to offer are truly beautiful. One example is the South Ridge National Park (Söderåsen) in the middle of Scania, which attracts two million visitors each year.⁶⁰ Accessibility to Scania's nature and wildlife is also unparalleled due to Sweden's world unique legislation called “allemansrätten”, which enables anybody to responsibly experience forests, lakes, meadows and just about anything else nature has

to offer, without first going through the trouble of getting permission from the landowner.

Sports and Leisure

Another distinguishing feat of the Øresund region is its rich selection of sports and leisure activities. Apart from having three Swedish Premier League football clubs, Scania also offers commuting distance to FC Copenhagen's home games at Parken, a stadium which seats more than 40,000 spectators. There are also more than 90 golf courses, of which more than 50 can be found in Scania.⁶¹ For those interested in sailing, the region boasts magnificent sailing waters and numerous cosy harbours. It also deserves to be mentioned that Malmö will host qualification competitions for the America's Cup during the summer of 2005.⁶²

High Quality of Life

According to UN's "Human Development Report 2004", which contains a study of the quality of life in 177 countries all over the world, Sweden is the second best country to live in. Denmark qualifies at number seventeen.⁶³ In another study, "Quality of Life Report", carried out by the consultancy firm Mercer, Copenhagen ranks as the sixth best city to live in. In that study, which covers 215 of the world's greatest cities, Stockholm and Oslo rank twelfth and fifteenth respectively. The report also ranks the capital cities of the EU, and in that comparison Copenhagen ranks second, only beaten by Vienna. The study is based on 39 indicators, which includes economic and social factors, education, natural surroundings and cultural life.⁶⁴

2.7 Information Technology and Telecommunications

- Sweden and Denmark are world leading within the field of information technology.
- Low telecommunications costs.
- The IT University in Ørestad, Copenhagen.
- Sigma has over the past few years opened IT upper secondary schools in Malmö, Vellinge och Landskrona.⁶⁵

Both Sweden and Denmark are at the forefront of the world when it comes to information technology. Common ways to measure this is for example by studying the number of personal computers per capita, or the percentage of people with Internet access, *etc.* No matter how you measure it, though, Sweden and

Denmark always belong to the countries with the absolute highest rating.⁶⁶

"Denmark is among the countries that are most advanced in IT use. In the USA we learn a lot from Scandinavia."

*Steve Ballmer, CEO of Microsoft Corporation*⁶⁷

The deregulation of the Swedish telecommunications market has spawned a fierce competition between a multitude of telecommunications service providers that all offers connections of the highest quality. In June 2003, Denmark was ranked fourth among the OECD countries in terms of broadband penetration. Sweden was ranked seventh.⁶⁸

In 1999 the IT College was founded in Copenhagen. In 2003 it received university status. Its purpose is to strengthen both research and education within the IT field in the Copenhagen area. Today several universities offer a wide variety of Master's degree programmes and conduct extensive research within this field.⁶⁹

Another example of the high degree of maturity the region has achieved in the information technology field is that Sigma, a Swedish company, has opened three IT upper secondary schools in Scania. The first one opened in Malmö in 2000 and was actually Sweden's first school of this type. ■

3 Economic Growth in the Øresund Region

3.1 The Importance of Clusters

The IT industry of Silicon Valley, the textile industry of northern Italy, the high-tech regions of Boston and North Carolina (the Research Triangle) are all examples of so-called business clusters. Such clusters are characterized by a strong concentration of commercial activities, which often arise in regions where the conditions of a certain industry are particularly beneficial. Although the Just-In-Time principle nowadays can be implemented as a global strategy due to improved inter-continental communications, the uncertainties that are associated with the transportation of goods tend to grow with the geographical distance. This means that entire production systems sometimes evolve to serve markets locally. Thus, when suppliers are contemplating to expand abroad, they are likely to opt for locations in close proximity to their customers; much in the same fashion other companies locate near or inside their targeted market regions. These facts, taken together, mean that a strong impetus for clustering and agglomeration is created, and there are more upsides to this than simply shorter transportations:⁷⁰

- access to skilled labour
- sharing of joint corporate functions and specialization between companies promote more effective operations
- warehousing costs can be minimized because suppliers and customers are in close reach
- economies of scale can be exploited
- companies and individuals can communicate faster and cheaper
- information can be obtained and distributed more easily
- the degree of uncertainty is reduced since all agents have access to the same information
- a shared sense of identity and a common culture of knowledge is created
- the concentration of know-how and resources stimulates innovation

The advantages associated with concentrating research within clusters (economies of scale and scope, control of the innovative process, and collaboration with various local agents) are highly significant, both in a regional and a national perspective. Having this said, it

is becoming increasingly common for companies to exploit several dynamic research centres located in a plural of regions. This is done in order to gain access to a broader spectrum of technologies and to create links between innovative processes. Furthermore, this helps facilitate both production and the penetration of local markets, in addition to improving customer and supplier relations.⁷¹

3.2 Clustering in the Øresund Region

The Maritime Sector

The Maritime Development Centre of Europe (MDCE) is located in Copenhagen and it organizes the maritime industry of the region. The organization has more than 100 Danish members and about 20 Swedish members. MDCE includes shipping companies, shipyards and their subcontractors, harbour companies, public authorities, shipbrokers, financial institutes, universities, and industry associations.⁷² The maritime sector employs about 85,000 people⁷³ in a total of 600-700 companies throughout the region. Moreover, the Øresund region is also home to the World Maritime University – a UN organization, which among other things offers a prominent MBA programme that attracts students worldwide.

The Biotech and Life Science Industry

There are more than 500 biotech and life science companies situated in the region, employing 41,000 people of which 5,000 are researchers. As much as 60 % of Denmark and Sweden's exports in this sector originate from the Øresund region.⁷⁴ In a European comparison the region ranks third in terms of scientific strength in this field, and the 11 university hospitals constitute important partners to the business community.⁷⁵ According to Ernst & Young, the Øresund region attracts more investment projects in this sector than any other region in Europe.⁷⁶ The industry is organized in the Medicon Valley Academy, which presently has some 250 members.⁷⁷ Among other things, this organization promotes Medicon Valley internationally. It also provides a forum for cooperation between universities, companies and public authorities.

"The Copenhagen region and the southern part of Sweden, also known as Medicon Valley, are at the world forefront in biotech and life science"

James C. Mullen, CEO of Biogen⁷⁸

IT, Telecommunications and Electronics

The Øresund University and the Øresund Business Council founded the Øresund IT Academy in November 1999. Its board members represent the industry and the universities in equal proportions. Its objective is to function as a platform for interaction between IT companies and the academic community; similar to how Medicon Valley Academy works.⁷⁹ There are approximately 12,000 IT companies in the region with more than 100,000 employees, making it the largest IT cluster in Scandinavia.⁸⁰

Food Industry

The Øresund University founded the Øresund Food Network with a vision “to make the Øresund region visible as one of the most knowledgably, technological advanced and dynamic regions in the world within the field of agriculture and food production, processing, distribution and consumption.”⁸¹ Its board of directors represents the industry, academia and public authorities.⁸² The Øresund Food Network has focused on five main areas: quality and food safety, process technology, food and health, biotechnology, and logistics.⁸³ The food industry exports to more than 150 markets worldwide⁸⁴ and employs 145,000 people,⁸⁵ making it the largest industry in the region. There are nearly 3,000 small and medium sized food companies in southern Sweden and almost 50 % of the entire Swedish food industry is located in Scania.

Environment

Øresund Environment is a research and business network, which also incorporates the public sector. The organization was founded in 2001 with a vision to establish a model for cross-border cooperation within the environmental field and to enhance consciousness about environmental issues in the Øresund region.⁸⁶ When looking at the percentage of companies with environmental guidance systems in place, Sweden and Denmark are world leading.⁸⁷ Apart from the private sector, competence in the environmental field can also be found in EU’s Environmental Authority located in Copenhagen and of course in the universities. Alongside London, the Øresund region is leading in Europe when it comes to environmental research.⁸⁸

Logistics

Øresund Logistics is a network organization that includes about 350 organizations and companies engaged in the logistics sector. Its vision is to turn the region into one of Europe’s three most important logistical hubs. The network includes representatives from infrastructure owners, logistics providers,

manufacturing companies, different levels of government, and the academia.⁸⁹ The significance of the logistics sector is, among other things, reflected in the large quantity of goods that flow through the region’s airports and ports. The region’s splendid prerequisites for logistics have also convinced a large number of big corporations to locate storage and distribution centres to the region, e.g. L’Oreal, Toyota, Gillette, and Levi’s.

Design

Øresund Design is an industry organization, which seeks to promote and further develop the vast competence the region holds in the design field. Among other things, the organization wants to promote the application of design within industry, business and the public sector, aiming to enhance quality and to add material and immaterial value goods and services. Besides from functioning as a network and a marketing mouthpiece, Øresund Design specifies three main business areas: education and science, competence enhancement, and innovation.⁹⁰

International Organizations

A very high percentage of the labour force has international experience in Copenhagen, which for instance is reflected by the relatively large number of international organizations located there. In December 1998, there were 13 international organizations in Copenhagen, compared to Stockholm’s eight. These organizations include the European office of the WHO, the UNICEF Supply Office, the Environmental Authority of the EU and The Baltic Ports Organization.⁹¹ Scania’s multicultural composition can also play a significant and positive role when it comes to attracting even more international organizations to the region.

3.3 The Scientific Strength of the Øresund Region

An Innovative Setting

A number of leading economists including Jeffrey D. Sachs, assert that while developing economies need to absorb and assimilate new technologies, developed economies are reliant on their own innovative capacity in order to generate growth.⁹² If we look at investments in research and development as a percentage of the GDP, Sweden and Denmark positions themselves at second and eleventh place in the world.⁹³ On the EU Commission’s European Innovation Scoreboard, Sweden is first and Denmark fourth.⁹⁴ In addition to this, in 2002 Southern Sweden was presented with the

“Award of Excellence for Innovative Regions” for the second consecutive year. The award is based on some 20 criteria including innovative climate, number of patents, number of research organizations, as well as financial, administrative and judicial structures.⁹⁵

”Many leading companies are located in the Øresund region. In addition to this, the region offers plenty of alternatives for higher education through its many colleges, universities and other educational institutions”

Ludwig Hedlund, Director of Northern Europe Operations, Sun Java Center⁹⁶

A Science Region

The innovative capacity of a region is closely related its scientific strength and to its potential to interact with other strong regions. The excellent communications of the Øresund region make it relatively easy to maintain continuous exchanges with other regions, and both Sweden and Denmark are both leading countries in scientific production and scientific penetration. If scientific production is measured as the number of published articles in scientific journals relative to the population, Sweden is world leading and Denmark is third.⁹⁷ If we study how many times an article is quoted in other articles – a measure of scientific penetration – Sweden and Denmark qualify among the elite. In these scientifically influential countries, the Øresund region stands out as the strongest science region, followed by Stockholm-Uppsala. Europe’s most significant scientific centres, ranked by the number of published articles in scientific journals during the period 1996-1998, are presented in the table below. It is evident that the 12,000 researchers of the Øresund region have been frequently published:

The number of published articles, 1996-1998, in the natural sciences, engineering, and medicine⁹⁸

	Region	Articles
1	London	67,333
2	Paris	49,438
3	Moscow	45,579
4	Berlin	24,514
5	The Øresund region	23,792
6	Amsterdam-Haarlem-Utrecht	23,612
7	Stockholm-Uppsala	22,340
8	Oxford-Reading	20,882
9	Edinburgh-Glasgow	20,965
10	Manchester-Liverpool	19,712

The Øresund region stands out with its globally strong positions in the production of scientific articles within

the fields of medicine, nuclear and particle physics, and environmental research. The region is also at the forefront in Europe within several other fields, including high-tech and engineering.

In a global survey published towards end of the 1990s, the scientific production emanating from the Øresund region earned the region a creditable fourteenth position, whereas London, Tokoy/Yokohama, and the Bay Area of San Francisco grabbed the top spots. When it comes to scientific penetration, the Øresund region ranks number ten in the world.⁹⁹

3.4 Science Parks

The ideas and new technologies generated at universities have to be refined into commercially viable innovations by adapting them for the market, and by making them accessible to customers. In order to facilitate this process, a number of science parks have sprung up throughout the region. Most of them have been modelled upon the widely successful and internationally recognized science park of Ideon, which is located in the university town of Lund and which has an affiliation in Malmö. Ideon is among the largest science parks in all of Europe and presently harbours some 230 companies.¹⁰⁰ Besides Ideon, there are several other science parks in the Øresund region, which all help to ensure further development and commercialisation of novel ideas. In addition to this, the science parks constitute a surface of contact between different high-tech research fields, enabling them to function as a hotbed for innovation in their own right.

3.5 Regional Forecasts

Economic Growth

Over the last two years, Scania has held the top position in Sweden’s regional growth league. Scania’s economic growth for 2004, according to SBAB, amounted to a rather impressive 4.4 %, and the tendency for the coming two years also looks promising.¹⁰¹ The so-called Øresund Barometer’s Market Outlook Index, which is based on the tendency for 2004, paints a similar picture for the whole of the region. As a matter of fact, the expectations expressed in this index are so optimistic that they suggest that the region is moving towards another business cycle high.¹⁰²

There are a large number of assessments regarding the long-term development in the Øresund region. The most striking feature of these is perhaps the high level of

optimism they express. For example, a fully integrated region is expected to generate a gross regional product (GRP) growth of about 10 % in Scania and 2 % in Zealand.¹⁰³ The discounted present value embedded in the integration process over the coming 30 years has been calculated to be in excess of 45 billion euro.¹⁰⁴ Having this said, we should also take into account the contribution made by the heightened level of attention the region already generates.¹⁰⁵ This is also reflected in the European think-tank, Robert Huggins Associates, which estimates that the average annual economic growth rate in Scania during the period 2004-2010 will be a healthy 3.5 %.¹⁰⁶

“Copenhagen is brilliantly located because of the Øresund fixed link. We can note that the area is growing at an incredible rate”

Flemming Jensen, Director LB Kiel¹⁰⁷

Employment and Labour Force

Following the decline in Scania’s general employment level, which lasted from the fourth quarter of 2003 until the third quarter of 2004, the situation is now beginning to stabilize. According to estimations made by the County Labour Committee, Scania’s employment level was unchanged for 2004. However, the forecast for 2005 is positive with a projected increase in employment by 0.5 %.¹⁰⁸ Looking ahead to 2008, the forecast indicates a rise in employment in Scania by more than 8 % while it on the Danish side is expected to rise by 3.5 %, which is equivalent to 43,000 and 39,000 new jobs being created.¹⁰⁹

The Construction Market

Seen from the beginning of the 21st century and looking ten years ahead, it is estimated that about 12 billion Euro will be invested in the regional infrastructure. One example is the Copenhagen Metro, which opened in October 2002. Other ongoing projects include the Malmö City Tunnel, investments at Copenhagen Airport, and improvements of ports, roads and railroads.¹¹⁰

During 2002 and 2003 construction increased in Scania by 11 %, which can be compared to a decline in Stockholm and West Sweden by 34 % and 14 % respectively.¹¹¹ The number of approved building permits in greater Malmö indicates that the construction of more than 2,500 new residential dwellings may have been initiated in 2004. This would be a significant increase from the previous year.¹¹²

The prospected improvements of the infrastructure in the region, now at various stages of planning, will make the region even more attractive. These projects include a fixed link across the Fehmarn Strait, a tunnel between Helsingborg and Helsingør, as well as a high-velocity railroad between Stockholm and Hamburg, via Jönköping, Helsingborg and Copenhagen.

Health, Pharmaceuticals, and Biotech

In Medicon Valley’s initial assessments, ten companies per year would locate to the region. As early as 2001 nine new biotech and biomedical companies came, and this trend seems to continue. Figures from Statistics Denmark and Statistics Sweden, show that the number of companies and people employed within this sector grew by 19.3 % and 18.6 % respectively during the period 1999-2002.¹¹³ During the same period, total turnover increased by 36 %.¹¹⁴ Today there are 125 biotech companies and since the early 1990s 10-15 start-ups have emerged every year.¹¹⁵ There are no signs that the future will be anything but bright as the growth in the biotech sector is expected to continue.¹¹⁶

Wholesale and Retail Trade

Retail trade is perhaps the sector of the economy that did best during the spring of 2005 and for which the expectations are set the highest for the remainder of the year.¹¹⁷ This optimism is also shown in the strong regional will to build factory outlets and shopping centres. In September of 2002, for example, the shopping centre Nova opened just outside Lund and in Ørestad Scandinavia’s largest shopping centre, Field’s, opened for business in 2004. Lately, quite a few international retail chains have also established a presence in Scania; one example is Bauhaus, the German home improvement retailer.

The Food Sector

The food sector has an enormous potential and the Øresund Food Network expands the scope of this potential even more by supporting, among other things, the development of so-called “functional food”. Despite of this, the growth figures the food sector has putting out over the last couple of years have been fairly modest. However, the 11th issue of the Øresund Barometer contains a survey that implies a brighter outlook during the spring of 2005 with more orders coming in.¹¹⁸

IT, Telecommunications and Electronics

In the wake of the global decline in the IT industry, the sector is now beginning to recover. The turning point that became visible towards the end of 2003 has

now gained momentum and order books are beginning to fill up. The future also seems promising; during the spring of 2005 invoicing is expected to increase heavily. If we look at the entire region, companies expect to continue to hire new staff, and do so in significant numbers.¹¹⁹ ■

4 Industry Integration

Integration Benefits Companies

The integration process in the Øresund region will take time. Most likely, it will take ten to twenty years before we can speak about a common housing and labour market. The political efforts made to aid integration have so far been too few and too weak. Nonetheless, there is a strong will to integrate, both among the public and companies. Keeping in mind the large number of companies which already have set up operations on the other side of the strait, it would not be far-reaching to say that the industry has taken on a leading role in the integration process.

”Lund is a good starting point for a Swedish establishment [...] Here you find a strong market, skilled people and Copenhagen is nearby”

Steen H. Knudsen, CEO of Maersk Data¹²⁰

Apart from the opportunity to exploit the better of two different sets of business conditions (see section 2.3), there are a number of strategic advantages for a company to enjoy in an integrated Øresund region. These advantages have to do with what economists often refer to as “economies of scale and scope”. Among other things, this concept involves the following:

1. Through the integration process, companies in both Denmark and Scania gain access to a significantly expanded local market on which they can sell their products. The companies can exploit the advantages of this larger market without having to set up an autonomous organization on the other side of the strait. In other words, it becomes possible to reach an entirely new market at a relatively low cost, while management and other key divisions can remain at the same location. To simplify matters a little, you can say that there are two ways integration can happen. Service providing companies can integrate by establishing an office on the other side of the strait, thereby reducing the distance to their customers. Manufacturing companies, on the other hand, can exploit economies of scale by concentrating production to just one side of the strait.
2. A larger market means that highly specialized companies are met with a more ready market for their products, which improves overall supply in the region.

3. Since we also eventually will have a common labour market, companies will benefit from a more ample supply of skilled and specialized labour.
4. A direct consequence of the Øresund fixed link is, of course, the logistical advantage that is obtained by incorporating the entire region within one common distribution system. This means that transports of goods can be carried out more efficiently. For example, a bakery (Sjöholms Bröd) on the Swedish side of the strait nowadays delivers bread to all McDonald’s restaurants in the region.
5. An integrated Øresund region also amplifies the possibilities of forging new alliances with companies operating within the same industry in order to exploit synergies and to share risk-taking and development costs. The Øresund Chamber of Commerce and Industry has initiated the so-called “Øresund Index of the Industry”, which on a yearly basis describes how far the integration process have gotten. An interesting find from the 2004 survey is that companies in Scania and Zealand cooperate almost as much with each other as companies in Stockholm and Jutland cooperate with companies located inside their own regions.¹²¹

Some examples of the different ways the industry has taken on a leading role in the integration process can be found below. The list only contains a selection of such examples. There are many more. In fact, Statistics Sweden has found that more than 30 % of the Swedish companies and almost 20 % of the Danish, in some way, have established a presence on the other side of the strait; everything from marketing operations to physical establishments.¹²²

”I can see no major differences between the Danish and Swedish ways – rather there are amusing little episodes, which brightens everyday life”

Lars Karlsson, CEO of Copenhagen Malmö Port¹²³

Company Integration

THE FOOD SECTOR

- Danish Crown and Swedish Meats have initiated an export partnership.¹²⁴

- Steins Laboratorium AB and the Swedish dairy MSAB have merged.¹²⁵
- Danish SFK Foods has acquired Nordfalks (Swe) and formed a combine in the food industry.¹²⁶
- The V&S Group (Vin & Sprit AB) has bought Danisco Distillers (De Danske Spritfabriker).¹²⁷
- Swedish and Danish dairy products are marketed on both sides of the strait.
- Skåne-möllan has acquired 25 % of the Danish flour producer Mel-compagniet in Esbjerg.¹²⁸
- ISS, the Danish service company, has established a presence in Scania.
- Swedish brewery Kopparbergs has set up operations in Denmark (Kopparbergs Danmark APS).¹²⁹
- MalacoLeaf has located its headquarters to Malmö but concentrates production to its Danish factory in Slagelse, Zealand.
- Danish Danaeg and Swedish Kronägg (egg producers) have merged.¹³⁰
- Cerealia, a food company, has acquired Danish bakery Schulstads.¹³¹
- The food company Skånekött now has a presence in Denmark through its acquisition of Kreatina, located outside Köge.¹³²
- Food producer Finax in Helsingborg has acquired a position in the Danish sales company Dansk Detail Salg.¹³³
- Danish food processing company, DAT-SCHAUB, has taken over Swedish Khi Ellco Foods AB.¹³⁴
- ExactSoftware, based in the Netherlands, has opened an office in Rødovre, which is also intended to provide support to Swedish customers.¹³⁹
- Cybercom has bought Consafe Infotech in Malmö and continue their expansion on both sides of the strait.¹⁴⁰
- The IT consultancy firm Enea and Danish IBM are negotiating terms for a collaboration.¹⁴¹
- The Copenhagen office of Colt Telecom intensifies its sales efforts towards the Malmö area.¹⁴²
- DanishNextlink has made a new issue of shares in Sweden.¹⁴³
- Danish eWire, involved in payment systems, has now also launched its product on the other side of the strait.¹⁴⁴
- Successful Danish web portal gratis-ting.dk has come out in a Swedish version at the address www.gratis.se.¹⁴⁵
- Danish telecommunications company Mobitech has landed its first Swedish order and the plan is to continue its Swedish expansion.¹⁴⁶
- Ideon company QlikTech has through its Danish partner, Capana ApS, received an order from a prestigious Danish customer, TDC Mobile.¹⁴⁷
- Connector, a subsidiary to the Scanian IT company Sigma, has landed its biggest order so far from the Danish Social Ministry.¹⁴⁸
- Swedish IT consultancy firm Consignit with an office in Malmö, has now also opened in Copenhagen.¹⁴⁹
- Danish IT security company Protego nowadays also offers courses in Malmö.¹⁵⁰
- Mindroute, based in Malmö, has struck its first deal in Denmark by attracting Loyalty Group as a customer.¹⁵¹
- 3, the mobile phone carrier company has opened a customer centre in Ørestad, which serves both Danish and Swedish customers.¹⁵²
- Maersk Data has initiated a strategic cooperation with Avail Intelligence, based in Malmö. Overall, Maersk Data is very dedicated when it comes to exploiting the advantages the integration process brings.¹⁵³ As of before, Maersk Data has already taken over ItAssign in Malmö and Framfabs office in Lund, as part of their Swedish expansion.¹⁵⁴

IT, TELECOMMUNICATIONS AND ELECTRONICS

- QlikTech, based in Lund, has opened an office in Copenhagen in order to strengthen its position on the Danish market.¹³⁵
- Danish Nordic Venture Partners and Swedish Innovationskapital invest about 5 million Euro in Appium, a high-tech company based in Malmö.¹³⁶
- Danish Ciklum is in the process of establishing a presence in Scania and is presently looking for a Swedish partner.¹³⁷
- Glaze's Danish venture has been successful and plans are in the making to further expand its operations.¹³⁸

- Danish Ciklum, an IT consultancy firm providing services in the Ukraine, is presently searching for a Swedish partner to handle sales in Sweden.¹⁵⁵
- Danish-Swedish Cellpoint has landed a big order for alarm systems from the Scania Police Department.¹⁵⁶
- The consultancy firm Resco AB has restructured and formed a new division, Resco Öresund; part of an effort to establish a presence on the Danish market.¹⁵⁷
- Swedish IT companies Mandator, VM-data and Netch all have a presence in Copenhagen, either by the opening of branch offices or through acquisitions.
- Danish PC producer Amitech wants to reach the Swedish market and to that end has begun to cooperate with Swedish Thorn.¹⁵⁸
- Danish venture capital firm, Olicom, has invested in the Ideon based company of Scalado.¹⁵⁹
- Chainformation, the Malmö based software company, now markets their products in Denmark.¹⁶⁰
- Danish Data Display A/S has offices in both Copenhagen and Lund.¹⁶¹
- Danish IT consultancy firm Consit A/S has started a Swedish subsidiary.¹⁶²

THE CONSTRUCTION AND PROPERTY MARKETS

- Danish Keops invests about 110 million Euro in real estate in southern Sweden.¹⁶³
- Brick manufacturer Egernsund Tegl has acquired 50 % of Scanian Tegelmäster AB.¹⁶⁴
- Light concrete manufacturer, H+H International A/S, has opened a sales office in Malmö.
- A number of Swedish construction and real estate companies, *e.g.* Skanska, NCC and Wihlborgs, are major actors on the Danish market.
- EjendomsSelskabet Norden has acquired real estate in Malmö.¹⁶⁵
- Danish home improvement retailer, Harald Nyborg, has opened stores at three locations in Scania.¹⁶⁶
- SvenskDansk Fastighetsförmedling is a network of several real estate agencies in Denmark and Scania.¹⁶⁷
- Danish real estate company Ordrupdal has acquired property in Ljungbyhed, Scania.¹⁶⁸
- Swedish architect's office, White Arkitekter, has established a presence in Copenhagen.¹⁶⁹

HEALTH, PHARMACEUTICALS AND BIOTECHNOLOGY

- Gastrotech Pharma, A Swedish-Danish research company based in Copenhagen, is cooperating with Eli Lilly.¹⁷⁰
- Danish DTU Innovation has made its first investment in Sweden by acquiring a position in Celltrix, a Scanian biotech company.¹⁷¹
- Dentina Dentallaboratorium, located in the Scanian town of Skurup, has enjoyed great success on the Danish market.¹⁷²
- Danish Novzymes invests in its subsidiary in Lund.¹⁷³
- Danish and Swedish investors provide venture capital to Alsensa, a medical technical company based in Copenhagen.¹⁷⁴
- Swedish Meda buys the Danish pharmaceutical company MedicTeam.¹⁷⁵
- Nordic Biotech, Novo A/S, VaekstFonden, SEB Företagsinvest and Life Science Venture are new part owners of Danish Nuevolution.¹⁷⁶
- Sigma Infotech, a subsidiary of publicly traded Sigma, has landed a substantial order in Denmark. The company sees the order as a breakthrough in the Danish market.¹⁷⁷
- Danish Bioban is in the process of establishing a presence on the other side of the strait. The network will then cover the entire region.¹⁷⁸
- Galenica, a pharmaceutical company based in Malmö, has started a Danish subsidiary.¹⁷⁹
- Danish pharmaceutical company, Spadille A/S, today known as aCRONordic A/S, has chosen to expand on the Swedish market.¹⁸⁰
- Danish Kivex A/S now has a presence in Medeon in Malmö through its subsidiary Qure AB.¹⁸¹
- The medical technical company, Stryker A/S, has integrated its Danish and Swedish customer relations divisions and located it to Malmö.¹⁸²
- Danish Scantox A/S and Clinical Data Care AB, based in southern Sweden, cooperate.

- Ferring Pharmaceuticals has its headquarters in Denmark and production facilities in Scania.
- Medicon, a Danish pharmaceutical company, now has a presence in Helsingborg.¹⁸³
- Danish pharmaceutical company Copyfarm has expanded its operations to Arlöv outside Malmö.¹⁸⁴

BANKING AND FINANCE

- FöreningsSparbanken has opened an office in Copenhagen. An acquisition of a Danish bank can also appear on the agenda at a later stage.¹⁸⁵ FöreningsSparbanken is also majority shareholder of Danish FI-Holding A/S.
- Creandum, the Swedish venture capital firm, will now expand its activities and search for Danish ventures to invest in.¹⁸⁶
- The Danish Stock exchange portal Euroinvestor is now also available in a Swedish version.¹⁸⁷
- Symbion Capital I, a venture capital fund based in Copenhagen, looks to the entire region for their investments.¹⁸⁸
- Malmöhus Invest AB has initiated a joint venture with Danish-Swedish Øresund Health Care A/S.¹⁸⁹
- EQT Scandinavia, the Swedish venture capital fund based in Copenhagen, has invested in several Danish companies.¹⁹⁰
- SEB (Swe) expands in Denmark, and Danske Bank (Den) targets the Swedish market.¹⁹¹
- SEB and Handelsbanken (Swe) provide Internet banking to Danish customers.¹⁹²
- The investor relations focused company, Intellecta, has established a presence in Copenhagen.¹⁹³
- Handelsbanken has bought the Danish regional bank Midtbank.¹⁹⁴
- Danske Venture Partners, a Danish venture capital firm, has invested in Appium; a Swedish IT company.¹⁹⁵
- The PR firms Ramm and Powerofthepen are cooperating.¹⁹⁸
- A'jour Klip Gruppen is a Danish news-service, which nowadays covers and distributes Swedish and Danish news to both sides of the strait.
- The law firms Magnusson Wahlin (Swe) and Qvist-Stanbrook (Den) have merged.¹⁹⁹
- The marketing analysis company, Millward Brown Denmark, has acquired the license of Millward Brown in Sweden and in this process made the Danish office their headquarters.²⁰⁰
- Swedish law firm Albihs, specialized in intellectual property law, has opened an office in Denmark.²⁰¹
- The communications firm ID, based in Malmö, is working together with their Danish partner Sylvester-Hvid & Partners.²⁰²
- OFIR.com, a Danish company that is providing Internet job advertising, has opened an office in Malmö.²⁰³
- Cultivator, a Danish consultancy and recruitment firm, has opened an office in Malmö.²⁰⁴
- The staffing and recruitment companies Poolia, Manpower and Proffice have set up operations in Copenhagen.²⁰⁵
- Swedish high-tech consultants Semcon have established a Danish presence.²⁰⁶
- Swedish high-tech consultants Benima have opened an office in Copenhagen.²⁰⁷
- The global consultancy firm BearingPoint has moved its Malmö office to Copenhagen in order to gain better coverage of both Denmark and southern Sweden.²⁰⁸
- PR firm Heimburger in Helsingborg has been taken over by the Danish advertising agency Nørgaard Mikkelsen.²⁰⁹
- A number of accountancy and consultancy firms, e.g. Ernst & Young, Deloitte & Touche, Price Waterhouse Coopers and KPMG, have set up specific Øresund task forces or are cooperating between their Danish and Swedish offices.
- The communications company KREAB has formed a new division, KREAB Øresund, with headquarters in Copenhagen and a branch office in Malmö.²¹⁰

BUSINESS-TO-BUSINESS

- Attach, a communications firm based in Malmö, is cooperating with InfoXpert in Danish Hørsholm.¹⁹⁶
- Sund Kommunikation (Swe) and Effector (Den) have together landed orders from two major American companies.¹⁹⁷

- Språklink offers language courses in Danish and Swedish to companies on both sides of the strait.²¹¹
- Aspekta, a PR firm with headquarters in Malmö, has opened a branch office in Copenhagen.²¹²
- Utenthal, a Danish graphic production company, has established a presence in Malmö.²¹³
- AcadeMedia, a company in the educational sector, has cooperated with the employment exchange in Greater Copenhagen.²¹⁴
- Copenhagen Port and Malmö Port have merged into Copenhagen Malmö Port (CMP Port).
- The two taxi companies, TaxaMotor (Den) and Taxi Kurir (Swe), are cooperating closely.²²⁵
- The Mayfair Hotel in Copenhagen has acquired Hotell Tunneln in Malmö.²²⁶
- Danish Sterling now also operates from Malmö-Sturup Airport.²²⁷
- Gråhundbus, a Danish coach company, take passengers to Malmö-Sturup Airport and to the island of Bornholm, via the Swedish port of Ystad.

WHOLESALE AND RETAIL TRADE

- Stadium, a sporting goods and apparels retail chain, builds on its successful establishment in Denmark and have long-term plans involving some 25-30 stores in the country.²¹⁵
- Zara, a Spanish fashion retail chain with stores in Copenhagen, has now also opened in Malmö.²¹⁶
- Danish retailers Matas (health care), BR Leksaker (toys), Carli Gry (fashion), Ivan Grundahl and Bitte Kai Rand (fashion) have established a presence on the Swedish side of the strait²¹⁷
- Din Sko, a Swedish shoe retail chain, opened its first stores in Denmark in October 2000.²¹⁸
- Swedish Biltema (a car accessories and components retailer) has opened stores in Aalborg and Naestved.²¹⁹
- Synoptik, a Danish optics chain, has bought a number of shops in Sweden.²²⁰
- Danish Netto (groceries) has opened several supermarkets in Scania, *e.g.* in Trelleborg, Malmö and Lund.
- Retailia offers consultancy services to both Swedish and Danish retailers.
- Ilva, the biggest home decoration retail chain in Denmark, has opened its first department store in Malmö.²²¹
- International Motors in Helsingborg imports cars from Subaru for both the Swedish and Danish market.²²²

TRANSPORTS, LOGISTICS AND HOTELS

- DSB Tågværdsbolag AB (Den) will service railway commuters on both the so-called Øresund Trains and on intra-Scanian trains (Pågatågen).²²³
- The Swedish Postal Service buys services from the Danish software company Transvision A/S.²²⁴

THE MEDIA SECTOR

- Radio Malmöhus and Radio Copenhagen are cooperating.²²⁸
- Rapidus, an electronic newsletter, has set up operations; covering the Øresund region.
- The news agency Nytt från Öresund supplies news from business and society to the media, the business community and other interested parties.²²⁹
- The movie production company Scandvision Film has through its Malmö office increased its Danish market share markedly.²³⁰
- The newspaper industry is opting for integrated products, *e.g.* Metro has started the monthly magazine MetroØresund and Sydsvenskan (the largest regional newspaper in Scania) is now also marketed in Denmark.²³¹

MISCELLANEOUS

- The Danish travel agency Spies can now also be found in Malmö.²³²
- The Danish insurance company, Fair Forsikring, is contemplating a possible Swedish establishment.²³³
- ElektroVakuum, which among other things manufactures signs, has opened an office in Copenhagen.²³⁴
- Ballingslöv, a Swedish kitchen manufacturer, has bought the Danish Svane Kökkenet and are now planning to expand their production facilities.²³⁵
- Swedish TrädgårdsRingens and Danish Planteskole-Ringen (gardening) are coordinating their procurement activities via a new central.²³⁶
- Espresso House (Swe) has opened its third coffee bar in Denmark.²³⁷

- TAC, with European headquarters located in Malmö, has landed a major order from Radio Denmark.²³⁸
- Danish Orlik Tobacco Company has built a factory in Malmö.²³⁹
- Omnistat, a company located in Malmö that develops statistical databases and database formats, has both Swedish and Danish partners.²⁴⁰
- Billetnet, a Danish ticket agency, are now also targeting the market in southern Sweden.²⁴¹
- Toy manufacturer Brio has acquired 25 % of the Danish toy manufacturer YES.²⁴²
- Öresundskraft, a Swedish energy group, now also targets the Danish market.²⁴³
- Royal Scandinavia distributes handicraft worldwide from a central in Malmö.²⁴⁴
- Since the 1st of July 2000, the Swedish and Danish postal services are cooperating in the Øresund region.²⁴⁵
- Intellectual property offices Ström & Gulliksson AB (Swe) and Plougmann & Vingtoft (Den) now belong to the Arator Group.
- MBE (Mail Boxes Etc), which functions as a privately owned postal office, have expanded their operations from Copenhagen to also include Helsingborg on the Swedish side.²⁴⁶
- The manufacturing company, Hilti, has coordinated common functions for their Danish and Swedish divisions.²⁴⁷
- Danish kitchen manufacturer, Kvik, invests in Sweden and now has five stores in Scania.²⁴⁸
- The waste disposal company, Sysav Kemi, has for example exported residual oil to Dansk Olie Genbrug.²⁴⁹
- Svenska Lim in Landskrona has acquired the Danish glue manufacturer Frede Andersens Fabriker A/S.²⁵⁰
- The packaging company JD Stenqvist has acquired the Danish bag manufacturer Unibag.²⁵¹
- Rexam, which has taken over PLM, can be found in both Malmö and Denmark.²⁵²
- Club Hep Cat, a club started in Lund, has opened in Copenhagen.²⁵³
- Krak, a Danish map company, has included maps of Scania on their website.²⁵⁴ ■

5 Company Establishments in the Øresund Region

“Together the region constitutes a critical mass, which can grow by its own force in the new Europe”

*Jørgen Birger Christensen,
Chief Economist, Danske Bank²⁵⁵*

A number of companies have already established a presence in the Øresund region because of the ongoing integration process; a process which is believed to accelerate over time. The list below makes no claim of being complete or all-inclusive.

THE FOOD SECTOR

- Danish web store and food distributor, Aarstiderne, now targets the Swedish market.²⁵⁶
- Findus has moved their headquarters from London to Malmö.²⁵⁷
- The global American company, Sensient Technologies, has set up operations in Kristianstad.²⁵⁸
- Danish dairy company, Danone, has set up operations in Malmö.
- Unilever from Stockholm to Helsingborg
- Sardus has moved their headquarters from Stockholm and Halmstad to Helsingborg.²⁵⁹
- Max, a Swedish fast-food franchise, has opened restaurants in Scania.²⁶⁰

HEALTH, PHARMACEUTICALS AND BIOTECHNOLOGY

- The Danish diagnosis company, MediGroup, has established a presence in Medeon in Malmö.²⁶¹
- Acadia Pharmaceuticals, an American pharmaceutical company traded on the Nasdaq, builds new facilities (3,000 m²) in Medeon Science Park.²⁶²
- Crystal Research, based in Uppsala, has opened a laboratory in Ideon, Lund.²⁶³
- Pipeline Biotech A/S has set up operations in Symbion Science Park in Copenhagen.²⁶⁴
- Euromedica has opened an office in Copenhagen.²⁶⁵

- The American publicly traded company, Cooper Surgical, has bought Medscand in Malmö.²⁶⁶
- Biogen, the American biotech company, has established operations in Hillerød, just north of Copenhagen.²⁶⁷
- Danish Orifarm A/S has moved its Swedish headquarters from Stockholm to Malmö.²⁶⁸
- CIPHERGEN Biosystems Inc. has established an organization responsible for Scandinavia, Finland and the Baltic States.²⁶⁹
- Eli Lilly²⁷⁰
- Bristol Myers²⁷¹
- Bayer has moved its Scandinavian headquarters from Stockholm to Copenhagen.²⁷²
- Medarex Inc. has located its European subsidiary Genmab A/S to Copenhagen.²⁷³
- American Maxygen gained a presence in Denmark in May 2000 through its acquisition of ProFound Pharma, and in that process also moved its pharmaceutical division's headquarters from Silicon Valley to Copenhagen.²⁷⁴
- Novo Nordisk Farmaka has concentrated its entire Nordic sales organization to Malmö.²⁷⁵
- Norwegian Nutri Pharma has opened an office in Copenhagen.²⁷⁶

IT, TELECOMMUNICATIONS AND ELECTRONICS

- German IFM Electronic, which sells guidance systems to the industry, has opened an office in Malmö.²⁷⁷
- Elan IT is expanding heavily in Malmö; recruiting staff in great numbers.²⁷⁸
- The IT consultancy firm, Enea Öresund, is growing substantially and is in the process of recruiting new staff.²⁷⁹
- Israeli Disksites has established a presence in Copenhagen.²⁸⁰
- Pro-face, which develops touch screen terminals, has located its Swedish headquarters to Malmö.²⁸¹

- Intellibis, an IT consultancy firm based in Stockholm, has opened an office in Malmö and has recently also increased its staff there.²⁸²
- Rohm, the Japanese manufacturer of electronic components, has opened an office in Copenhagen.²⁸³
- Explit, a certified partner to Oracle, was founded in Malmö 2002.²⁸⁴
- Sun Microsystem AB has established a new division in the Øresund region, which shall operate both in southern Sweden and in Denmark.²⁸⁵
- The consultancy firm, ProTang, has opened an office in Malmö that functions as the company's Øresund office.²⁸⁶
- AddPro has located to Malmö and Helsingborg.²⁸⁷
- American IT giant Intel, has built new headquarters just outside of Copenhagen for its Danish subsidiary Giga.²⁸⁸
- British Colt Telecom has opened a branch office in Copenhagen.²⁸⁹
- American IT company, Stream International, are opening its first Scandinavian office in Helsingborg.²⁹⁰
- T-systems has located to the region through its acquisition of Primix Solutions, which business idea is to target the entire Øresund region.
- Dell Computers, which among other things offers network solutions to companies, now also have a presence in Denmark.
- NL Partner, a computer service company, has moved its marketing department from Stockholm to Malmö.
- Handelsbanken has moved parts of its shared functions to Malmö.²⁹¹
- SoftwareInnovation opened a branch office in Malmö in August 2000.²⁹²
- Alcatel, the telecom company, located its commercial Nordic Centre for mobile communications to Malmö.²⁹³
- The web agency Attraction has set up operations in Malmö.²⁹⁴
- Nasdaq traded IT company, Citrix Systems, has located its Nordic headquarters to Copenhagen.²⁹⁵
- Partnertech, an electronics company, has moved its headquarters to Malmö.²⁹⁶

- Zepto Computers, which manufactures notebooks, has established a presence in the region.²⁹⁷
- The acquisition of Elservice in Trelleborg has meant that Fiberdata, a subsidiary of TurnIT, has established a presence in the region.²⁹⁸

”Like many other businessmen, I see an immense potential in the Øresund region”

*Hasse Wallman,
Managing Director of Wallmans Nöjen AB²⁹⁹*

LOGISTICS AND TRANSPORTS

- EuroMaint, a train maintenance provider, has chosen to locate its reconstruction operations to Malmö.³⁰⁰
- TNT's customer service is concentrated to Helsingborg and DHL is expanding its warehousing facilities in Klippan.³⁰¹
- Mediterranean Shipping Company now operates liner traffic to and from Helsingborg Port.³⁰²
- Kuehne & Nagel has opened an office in Helsingborg.³⁰³
- Spanish steel giant Acerinox has located both warehousing functions and a service office to Malmö, with the objective to cover the entire Baltic region.³⁰⁴
- Rederiet i Örestad (a shipping company) have recently started up.³⁰⁵
- Toyota has moved its import and logistics divisions for the Nordic countries and the Baltic States to Malmö.³⁰⁶
- The logistics consultants, Top Logic, have opened offices in both Malmö and in Denmark.³⁰⁷
- DFDS Transport AB's Swedish headquarters are located in Malmö.

BUSINESS-TO-BUSINESS

- The European advertising agency, Welcome To Orange County, has opened an office in Copenhagen.³⁰⁸
- Kelly Scientific Resources, an American recruitment company specialising within the pharmaceutical and biotech fields, has opened an office in Copenhagen.³⁰⁹
- Assessio, which develops psychological tests, has established a presence in Copenhagen.³¹⁰

- Relevans Strategi & Kommunikation, an advertising agency geared towards the pharmaceuticals market, has set up operations in Helsingborg.
- The American call-centre company, Sitel, has opened an office in Copenhagen.³¹¹
- Mat på jobbet established their service function last year, delivering meals to company customers in the Malmö area.³¹²
- The service provider Big Image has set up operations in Malmö.³¹³
- The Media production company, Citat, are going to establish a regional office in Malmö.³¹⁴
- Nordengren, the advertising agency based in Stockholm, has opened an office in Malmö.³¹⁵
- The staffing company Arena Personal has opened an office in Malmö.
- Ernst & Young has moved its European VAT centre to Malmö.³¹⁶
- The recruitment company Alumni are opening an office in Malmö.³¹⁷
- The Norwegian customer service company, Multipartner, has located its Swedish headquarters to Malmö.³¹⁸
- GCI Mannov, a PR firm, has set up operations in both Malmö and Copenhagen.
- German PR firm Ehrenberg can be found in both Malmö and Copenhagen.³¹⁹
- The PR firm, Journalistgruppen, has set up operations in Malmö.³²⁰
- PR firm JKL has now opened in Copenhagen.³²¹
- Lydeking, an advertising agency, has opened an office in Copenhagen.³²²
- Hammer & Hanborg, a recruitment company, has set up operations in Malmö.³²³
- Thulin rekrytering (recruitment) has opened an office in Malmö.³²⁴
- The German-Swedish Chamber of Commerce has opened an office in Malmö.³²⁵
- SandbergTrygg, an advertising agency, has established a presence in Malmö and acquired Henri Annonsbyrå.³²⁶
- Advertising agency kommun.communications has opened in Malmö.³²⁷

- Expotours & Events, working with event marketing, has set up operations in Malmö.³²⁸
- Ark Travel AB (business trips and conferences) now has a presence in Malmö.³²⁹

WHOLESALE AND RETAIL TRADE

- Melka opens its first store in Malmö and specifically points to the strategic location of the city as a main reason underlying its establishment.³³⁰
- The largest trading company in the world, Test Rite (China), locates its Nordic headquarters to Kristianstad.³³¹
- ICA (groceries) locates a highly modern warehousing complex to Helsingborg.³³²
- The English fashion retail chain, Next, has opened its first store in Copenhagen.³³³
- Honda Power Equipment, which sells and markets Honda products, has moved from Stockholm to Malmö.³³⁴
- The Finnish home improvement retail chain, K-rauta, already with a presence in Helsingborg are planning to open in Malmö.³³⁵
- BRL Electronics has set up operations in Malmö.³³⁶
- Glashuset has started up in Malmö.³³⁷
- SIGAB, wholesaler for technical isolation, has set up operations in Malmö.³³⁸
- IKEA moves the majority of its headquarters' functions to Helsingborg.
- British Car Import can now be found in Malmö.³³⁹
- IMI Nordgrens has established a presence in Malmö.³⁴⁰
- Japan Photo is located in Malmö.³⁴¹
- Orifarm has opened an office in Malmö.³⁴²
- Price Off has set up operations in Malmö.³⁴³
- Rusta can now be found in the region.³⁴⁴
- Seating Concept has opened in Malmö.³⁴⁵
- Vitalas³⁴⁶
- Hööks Hästsport AB (equestrian sports) has opened its first department store in Kolding, Denmark.³⁴⁷
- German home improvement retail chain, Bauhaus, is expanding in Scania with department stores in Helsingborg, Löddeköpinge and Malmö.³⁴⁸

BANKING AND FINANCE

- Finnish investment firm, Bio Fund, has opened an office in Copenhagen.³⁴⁹
- Öhman Fondkommission has set up operations in Malmö.³⁵⁰

HOTELS AND PROPERTY

- Clarion Hotel, a subsidiary to Choice Hotels, has opened in Copenhagen.³⁵¹
- The real estate company, Dockan Exploatering AB, has set up operations in Malmö.³⁵²
- The Norwegian hotel and real estate company, Home Invest, has bought Swedish Hotel Temperence in Malmö.³⁵³
- Erik Olsson Fastighetsförmedling (real estate agency) has established a presence in Malmö.³⁵⁴
- The global real estate company, Redevco, has opened an office in Malmö.³⁵⁵
- Hotel chains, Hilton and Marriot, have opened hotels in Copenhagen.³⁵⁶
- The Norwegian pension fund, KLP Ejendomme A/S, has acquired real estate in Copenhagen, which are its first investments outside of Norway.³⁵⁷
- Norrporten, the Swedish real estate company based in Sundsvall, has acquired property in Helsingborg and Kristianstad.³⁵⁸

MISCELLANEOUS

- American Tetra Chemicals moves its European headquarters to Helsingborg.³⁵⁹
- Duni restructures its operations and locates its headquarters to Malmö.³⁶⁰
- Pilkington already manufactures glass in Landskrona locates warehousing to the city, as well as another function previously located in Belgium.³⁶¹
- Dresser Wayne has moved manufacturing and headquarters to Malmö from Germany.³⁶²
- Thule has moved its headquarters to Malmö.³⁶³
- The storage company, Shurgard, used its Swedish office in Malmö as a base for its Danish expansion.
- Celsius Metech A/S, which is a part of SAAB, opens an office in Taastrup, Denmark.³⁶⁴
- Portsystem 2000 has opened an office in Malmö.
- The Gillette Group.

- German Alexander Binzel, which markets welding equipment, moved its office and warehousing functions from Karlskrona to Malmö in 2004.³⁶⁵
- Japanese optics company, Hoya Corporation, will create a Nordic centre in Malmö through its acquisition of Optikslip in Malmö. The objective is to supply spectacles glass to all of the Nordic and Baltic markets.
- Top Nordic, based in Landskrona, has moved its procurement division and warehousing functions to Copenhagen.³⁶⁶
- Swedish health care provider, Capiro, wishes to open a nursing home in northern Zealand through its Danish subsidiary Actica.³⁶⁷
- The building material company, Lafarge Braas Scandinavia AB, is planning to build a roofing tiles factory in Trelleborg.³⁶⁸
- Nordic Growth Market, a stock exchange for growth companies, has set up operations in Ideon, Lund.³⁶⁹
- The home service provider, Homemaid, has opened a branch office in Malmö.³⁷⁰
- Gardena has located its warehousing facilities for the Nordic market to Malmö.³⁷¹
- Daimler Chrysler has moved its Swedish headquarters from Stockholm to Malmö, and fused the Danish and Swedish organizations.
- German truck corporation, Jungheinrich, has moved from Stockholm to Scania.³⁷²
- French aluminium producer, Pechiney, has located its Nordic headquarters to Frederiksberg, Denmark.
- L'Oreal has set up a Nordic distribution centre in Copenhagen.³⁷³
- The Irish-German storage technology manufacturer, Storsack-eurea, has located its Nordic sales office to Helsingborg.³⁷⁴
- The toy manufacturer Mattel.
- Finnish Amer, which sells sporting goods and apparels, has opened a Danish-Swedish sales office in Malmö.³⁷⁵
- The national organization of Swedish driving schools has concentrated activities to Landskrona.³⁷⁶
- Färdig Betong, the concrete producer based in Gothenburg, has established a presence in Scania through its acquisition of 50 % of Essbetong.³⁷⁷ ■

Enclosures

ENCLOSURE 1: Studies on factors that guide companies in establishment decisions

The European Banking Union reports the following parameters based on a survey among 10,000 investors:

1. Infrastructure
2. Cultural life
3. Housing
4. Labour force
5. Business conditions
6. Support from different levels of government

OECD's surveys among US high-tech companies rendered the following factors as being the most important to companies in establishment decisions.³⁷⁸

1. Access to skilled labour
2. Supply of labour
3. Taxation level
4. Access to universities and colleges
5. Living expenses
6. Transports
7. Market accessibility
8. Regional restrictions
9. Energy costs
10. Cultural life and recreation

Invest in Sweden Agency has through their inquiries to about 150 corporate headquarters and division headquarters attempted to identify the most significant factors.³⁷⁹

1. Taxation of individuals
2. Efficient transports
3. Proximity to customers
4. Regulatory framework and economic policies
5. Corporate taxation
6. Proximity to suppliers

Stockholm City Council studied 20 international corporations and concluded that the following factors were most important.³⁸⁰

1. Telecommunications
2. Business conditions
3. Access to skilled labour
4. Living expenses
5. Road infrastructure
6. Housing

The British company Healey & Baker annually publish a study that among other things reports important factors in company establishment decisions. It is based on interviews with 500 corporate leaders. The following factors were reported 1999.³⁸¹

1. Market proximity
2. Transports (regional and international)
3. Quality of, and access to, telecommunications
4. Access to, and costs of, labour
5. Business conditions, *i.e.* taxes, subsidies, *etc.*
6. Availability of premises
7. Language culture
8. Efficiency of city infrastructure
9. Quality of life
10. Clean environment

ENCLOSURE 2: Universities and colleges in the Øresund region

The Øresund University is comprised of the following institutions:

Lund University, including Campus Helsingborg
University of Copenhagen
Technical University of Denmark
Copenhagen Business School
The Royal Veterinary and Agricultural University
Swedish University of Agricultural Sciences
The Danish University of Education
The Danish University of Pharmaceutical Sciences
Roskilde University
Malmö University
Royal School of Library and Information Science
The IT University of Copenhagen
The Royal Academy, School of Architecture

There are additional institutions with college status in Scania and Zealand. Some of these are listed below. There are also a great number of nursing institutes and schools of education in the region.

Copenhagen University College of Engineering
Danmarks Designskole (design)
Den Grafiske Højskole (graphic design)
The Royal Danish Academy of Music
The Royal Danish Academy, School of Visual Arts
World Maritime University
Malmö Academy of Music
Malmö Theatre Academy
Malmö Art Academy
Kristianstad University
School of Aviation

Notes

¹ Wichmann Matthiessen, "Regional udviklingsstrategi", in Wichmann Matthiessen (ed.), "Øresundsområdet, Verdensklasse: Eksempler & Perspektiver", 1998.

² New York Times, 6.9.1999.

³ Christian Wichmann Matthiessen & Åke E Andersson: "Øresundsområdet: det regionala udviklingsprojekt - status og forslag", Chamber of Commerce and Industry of Southern Sweden, 2002.

⁴ Due to limited access of regional European data, European metropolitan areas are here compared to the Copenhagen-Malmö-Lund area.

⁵ CMP news, No. 1, November 2001.

⁶ Svenska Vägföreningen, "EU-handel och transporter – Analyser och prognoser för Sverige", 1999.

⁷ The EU Commission, "Moving Forward", 1999.

⁸ Invest in Sweden Agency, "I huvudet på ett företag", 1999.

⁹ Copenhagen Capacity & Wonderful Copenhagen, "Copenhagen – Fact & Fiction", 1999, www.cph.dk.

¹⁰ Investigated by the Øresund Chamber of Commerce and Industry; a random sample was taken an ordinary weekday.

¹¹ Copenhagen Airports, www.cph.com

¹² Copenhagen Airports, 2002. IATA = International Air Transport Association.

¹³ Copenhagen Capacity, www.copcap.com.

¹⁴ Nytt från Øresund 13.7.2004. See also, ATRS at www.atrsworld.org.

¹⁵ Verdens Gang, Metro (TT), 21.2.2000.

¹⁶ Copenhagen Capacity & Wonderful Copenhagen, "Copenhagen - Fact & Fiction", 1999.

¹⁷ TNT and the Swedish Civil Aviation Administration, Press release 4.9.2000.

¹⁸ The Swedish Civil Aviation Administration, www.lfv.se.

¹⁹ CMP, www.cmp.com (Tonnage for 2003.)

²⁰ Trelleborg Port, www.trelleborgshamn.se.

²¹ Helsingborg Port, www.port.helsingborg.se.

²² Based on Transportgruppens statistics for 2004, www.transportgruppen.se.

²³ Copenhagen Capacity, www.copcap.com. (Concerns 2004.)

²⁴ European Logistics Survey, 1996, referred to in Copenhagen Capacity, www.Øresund.com/facts/copcap6.htm.

²⁵ Copenhagen Capacity, www.Øresund.com/facts/copcap6.htm.

²⁶ Newsletter Øresund Bridge, December 2002.

²⁷ Sydsvenska Dagbladet.

²⁸ "Copenhagen and Malmö - Property market report 2004", Sadolin/Albaek.

²⁹ Swedish Property Index 2003.

³⁰ "IMD, World Competitiveness Yearbook 2004", IMD.

³¹ OECD, www.oecd.org/dataoecd/44/3/1942514.xls. (Tax rates are valid for 2003.)

³² Industriförbundet, "Konjunkturen Skåne", 1999.

³³ Copenhagen Capacity, 2004, www.copcap.com.

³⁴ OMX, www.omxgroup.com.

³⁵ Start-Ups Index, Jobs and Society.

³⁶ See for example the Swedish National Tax Board's report 1999:3, "Vår omvärld år 2010", 1999; and assorted publications of Professor Åke E Andersson, the Royal Institute of Technology.

³⁷ The Swedish Labour Market Administration, Analysis Department, 21.11.2000.

³⁸ Statistics Denmark and Statistics Sweden; Ørestat, 2004.

³⁹ www.uni.Øresund.org and other organizations; www.Øresund.com.

⁴⁰ EFMD, www.efmd.org.

⁴¹ Scandinavian International Management Institute, www.simi.dk.

⁴² Erhvervsbladet/Brobusiness: "300 000 udlaendinge i Malmö / København", 16.3.2000.

⁴³ Øresundsinstittet, 20.4.2004, www.Øresundsinstittet.org.

⁴⁴ Øresundsinstittet: "Regional report 2003".

⁴⁵ Statistics Denmark and Statistics Sweden; Ørestat.

⁴⁶ The study "European Cities Tourism" referred to in a pressrelease from the City of Malmö, 11.2.2005, www.malmo.se.

⁴⁷ Statistics Denmark and Statistics Sweden; Ørestat, 2004. (Data from 2002.)

⁴⁸ AB Vigilator & Turismens Udviklingscenter, "Kortlægning og udvikling af perspektivrige samarbejdsprojekter inden for turismen i Øresundsregionen", 1998.

⁴⁹ Copenhagen Capacity, 31.3.2004.

⁵⁰ Wichmann Matthiessen, "Øresundsområdet. Verdensklasse: Eksempler og perspektiver", Preface, 1998.

- ⁵¹ Jonathan Power at the Transnational Foundation for Peace and Future Research, "The Danish Referendum on the Euro Could Change the Nature of Northern Europe", 30.8.2000.
- ⁵² Nytt från Öresund, 15.3.2004.
- ⁵³ Nytt från Öresund, 30.12.2004.
- ⁵⁴ Statistics Denmark and Statistics Sweden; Ørestat, 2004. (Data from 2002.)
- ⁵⁵ From Brinkmann, "Øresundsregionen kulturelle utrustning", 1997, referred to in AB Vigilator & Turismens Udviklingscenter, "Kortlægning og udvikling af perspektivrige samarbejdsprojekter inden for turismen i Øresundsregionen", 1998.
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- ⁵⁷ The Roskilde Festival, www.roskilde-festival.dk.
- ⁵⁸ Copenhagen Municipality and the City of Malmö, "Our new/Vår nya/Vores nye region", 1999.
- ⁵⁹ AB Vigilator & Turismens Udviklingscenter, "Kortlægning og udvikling af perspektivrige samarbejdsprojekter inden for turismen i Øresundsregionen", 1998.
- ⁶⁰ Verbal statement by Thomas Arnström, Director of Environmental Issues, Svalöv Municipality.
- ⁶¹ Various organizations, www.Øresund.com; Copenhagen Capacity & Wonderful Copenhagen, "Copenhagen - Fact & Fiction", 1999.
- ⁶² America's Cup, www.americascup.com.
- ⁶³ UNDP, "Human development report 2004".
- ⁶⁴ Mercer, www.imercer.com.
- ⁶⁵ Sigma College, www.sigmacollege.com.
- ⁶⁶ Copenhagen Municipality and the City of Malmö, "Our new/Vår nya/Vores nye region", 1999.
- ⁶⁷ Copenhagen Capacity, www.copcap.dk.
- ⁶⁸ OECD, www.oecd.org
- ⁶⁹ The IT University of Copenhagen, www.it-c.dk.
- ⁷⁰ Lundquist, Jonsson, Olander, "Närhet och vida nätverk", 1999.
- ⁷¹ *Ibid.*
- ⁷² Sydsvenska Dagbladet, "Maritima bolag repar mod vid Øresund", 25.9.1999; Erhvervsbladet/Brobusiness, 20.1.2000.
- ⁷³ Maritime Development Center of Europe, www.emuc.dk.
- ⁷⁴ Medicon Valley Academy, www.mva.org.
- ⁷⁵ Peter Halken, CEO Medicon Valley Academy, lecture 27.1.2000.
- ⁷⁶ Ernst & Young, European Investment Monitor 2004 referred to in Copenhagen Monitor, No.3 August 2004.
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- ⁸⁰ *Ibid.*
- ⁸¹ Øresund Food Network, www.Øresundfood.org.
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- ⁸³ Position Skåne, www.invest.skane.se.
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- ⁸⁵ Statistics Denmark and Statistics Sweden; Ørestat, 2002.
- ⁸⁶ Øresund Environment, www.Øresund-environment.org.
- ⁸⁷ Expressed as the number of environmentally certified companies per capita. Ny Teknik, "Sverige världsbäst på miljö", No. 2000:11.
- ⁸⁸ Wichmann Matthiessen (ed.), "Øresundsområdet, Verdensklasse: Eksempler & Perspektiver", 1998.
- ⁸⁹ Øresund Logistics, www.orelog.org.
- ⁹⁰ Øresund Design, www.Øresund-design.org.
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