



Business and
opportunities in the

Øresund region

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This report presents facts about the Øresund region from a company perspective. The basis for the account is the facts that play the greatest role in the setting up of a company in a region. This document is intended for use by companies considering setting up in the region or by companies who are already established and would like justification for increasing their investment in the immediate vicinity. The report also serves as a basis for the media, students and others who want to know more about the Øresund region in general. The report has been written by strategic analysts Henrik Andersson and Therése Persson.

The Chamber of Commerce and Industry of Southern Sweden is happy to provide further information, presentations etc for the purpose of assisting the above target groups. This report can be quoted providing the source is stated.

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1 Introduction

THE CONSTRUCTION AND OPENING of the fixed link across the Øresund has resulted in considerable media focus on the Øresund region and the potential this offers for integration between Zealand and Scania. An integrated Øresund region has excellent international competitiveness and, in all probability, will become one of the dominant areas in Europe. Professor Wichmann Mathiessen at the University of Copenhagen has summarised the region's qualities in the following points:¹

- ~ Strong and competitive commerce and industry with high efficiency, skills level and innovative climate.
- ~ Prominent public institutions in terms of higher education, universities and cultural life.
- ~ Top-class terminals and traffic links. Very good international connections.
- ~ Good social environment with a high welfare level.
- ~ Living areas and physical planning of a good standard.
- ~ Natural and physical environment of unique qualities.

“... the bridge connects the south of Sweden to the Continent and creates a new European economic centre that trumps Stockholm and is comparable with cities such as Berlin, Hamburg, Zurich and Amsterdam”.

*The New York Times*²

The Øresund region also offers good geographical proximity to the expanding Baltic market and also constitutes northern Europe's greatest local market for export goods. With its 3.5 million inhabitants – almost 25% of Sweden's and Denmark's population – there is a sufficiently large basis for creating a region with good development opportunities and attraction. At the same time, environmental problems are manageable and prices are at a reasonable level. Overall, this makes the Øresund region the strongest region in northern Europe and a very attractive location for companies to become established. The following table shows how the Øresund region matches up in the Nordic Area and in Europe.

The Øresund region's position in comparison with Nordic and European regions.

Factor		Position among Nordic regions	Position among European regions ³
Area	21 000 km ³	–	–
Population	3.5 million	1	27
Gross regional product (1996)	US\$ 120 billion	1	11
Gross regional product per capita	US\$ 34 500	1	3
International flight connections	Number of passengers ~14 million	1	9
Scientific strength (articles in scientific journals 1996-98 in the areas of medicine, science and technology)	Number of articles 23 792	1	6
Number of tertiary students	>130 000	1	?

Sources: Statistics Sweden and Statistics Denmark, Copenhagen Airports, Andersson & Wichmann Mathiessen, "Øresundsregionen, Kreativitet, Integration, Vækst" (1993), Copenhagen City Council and the city of Malmö, "Our new/Vår nya/Vores nye region" (1999), Øresunds Brokonsortiet, DTU Analysis & Research Promotion Center (1999)

2 The Øresund region's attractive forces

2.1 Factors of importance to business establishment

DIFFERENT INDUSTRIES AND COMPANIES, and perhaps even different parts within a company, have different criteria for their location. Improved communication and transport make it possible to establish the different parts in the optimum location. A goods-producing industrial company perhaps looks for an area with good potential for effective goods transport and low property costs whereas knowledge-intensive service industries (or an industrial company's research and development department) look to locate close to a university or institute and efficient transport for its staff.

There are several surveys that have studied which factors have the greatest importance for companies' choice of location (Appendix 1). If we summarise these surveys in a table we can gain an idea of the factors that are the most important as shown below.

The following parts of Chapter 2 describe how well the Øresund region satisfies the high demands made by these factors. Information technology and telecommunications are also considered since these are the factors that have become increasingly important over the years.

2.2 Infrastructure and transport

- ~ The requirement for effective personal and goods transport is increasing steadily as a consequence of internationalisation, new logistics strategies and other factors
- ~ The Øresund region has a very favourable position geographically
- ~ Kastrup is Europe's ninth largest airport, Sweden's second largest domestic airport and is ranked as one of the world's absolutely best airports
- ~ Sturup, Kristianstad and Ängelholm/Helsingborg are further airports in Scania
- ~ Three of Sweden's six largest ports for goods traffic are in Scania
- ~ The port of Helsingborg is one of the world's largest ferry ports for passenger traffic
- ~ Danish logistics are among the best in the world and Swedish logistics are ranked among the most efficient in Europe

Most significant factors for a company's choice of location.

The figures in the table state their position in the respective study.

Factor	European Banking Federation (6 factors)	Invest in Sweden Agency (6 factors)	Stockholms County Council (6 factors)	OECD (10 factors)	Healey & Baker (10 factors)
Infrastructure / transport	1	2	5	6	2
Industrial climate	5 and 6	4 and 5	2	8	5
Human resources, availability and qualifications	4	-	3	1 and 2	4
Market proximity, supplier/customer	-	3 and 6	-	7	1
Quality of life (culture, countryside, cost of living)	2	1	4	3 and 10	9 and 10

Natural gateway to the Baltic

Developments within information technology, membership of the EU and the subsequent harmonisation of legislation and regulations, internationalisation and the deregulation of national markets make it possible for companies to locate where opportunities are most favourable. At the same time, the need for a good infrastructure and good communications tends to increase. This applies to the transport of both goods and people. The Øresund region finds itself in a very central position geographically particularly bearing in mind the markets that are expanding in the former Eastern European countries. The region is a natural gateway to the Baltic area and, at the same time, has very good links with the rest of Europe and the world. Communication potential satisfies the demands for cost-efficient goods transport as well as fast passenger transport.

“Malmö is strategically well-placed for our transport routes to the rest of the Nordic Area as well as the Baltic, Poland and Russia”

Patrik Nyholm, Technical Director, Acerinox⁴

Effective transport increasingly important

The demand for effective goods transport is increasing as a consequence of several factors. The Just-In-Time principle can be applied as a global strategy thanks to our improved communications between different parts of the world. The value of transported goods is also increasing which means that costs tied up as capital are increasing. An example that can be quoted is that the value of goods transported between Sweden and the rest of the EU increased from SEK 4000 per tonne in the beginning of the 1970s to more than SEK 8000 per tonne in 1996.⁵ As a consequence of the increase in value, the growth of logistics is moving to an ever greater extent of mobile stock in order to minimise transport times and to reduce the requirement for warehouse buildings. As electronic commerce increases, and with transport costs amounting to almost 40% of a good's price compared with the present 10-20%, the need for efficient transport will continue to increase.

Travel on the increase

The trend is for passenger transport in general and international transport in particular to increase in terms of numbers and range. Since 1980 work directed at traffic has generally increased by two percent per annum within the EU whereas international traffic has increased by 2.4% per annum.⁶ Information technol-

ogy has created new contacts between people which, in turn, leads to new face-to-face meetings. IT does not therefore contribute to reducing the total amount of travel. Travelling also increases as a consequence of the internationalisation of commerce, trade and markets. The Invest in Sweden Agency has studied the reasons for company relocation and has found that the management groups for the large companies and their divisions find themselves travelling an increasingly greater amount of time. As a consequence of this, Stockholm for example can be considered altogether too peripheral to operate as an effective location for an international company.⁷ Travelling is also affected by the mergers and acquisitions that characterise both mature markets and the new growth markets. Cross-border mergers obviously intensify international contacts between different parts of companies.

International airports

Thanks to the fixed link, commerce and industry in the Øresund region has access to several different airports of which Kastrup (Copenhagen International Airport) is by far northern Europe's largest in terms of international air traffic. With its 113 international direct connections per day⁸ Kastrup is Europe's ninth biggest airport and today is already Sweden's second biggest domestic airport. It now serves 13 destinations in Sweden with around 70 departures per day.⁹

Kastrup was voted the world's best airport in IATA's 2002 market survey.¹⁰ The airport was also voted Europe's best airport¹¹ and is ranked among the best in the world in terms of turnaround times for goods with an average handling time of three hours. Kastrup is the airport in Europe with the fewest delays and disruptions to traffic¹² and also offers the third best range of business services among the world's airports, best passenger facilities and the third best range of restaurants.¹³ Kastrup is an airport of absolutely world class. It handled a total of more than 18 million passengers in 2001.¹⁴

The next largest airport in the region is Sturup with more than 2 million passengers a year.¹⁵ The airport has experienced very good growth in terms of passenger numbers in recent years. This growth is forecast to continue despite a temporary slowdown since 11 September 2001 thanks to the increasing catchment area resulting from the fixed link across the Øresund. The airport's geographical location has also meant that both Swedish and Danish charter and freight companies, including TNT and UPS, now use Sturup as a base for their flight operations. In addition to Sturup there are a further

two airports in Scania - Ängelholm/Helsingborg Airport and Kristianstad Airport with considerable traffic to the Baltic.

“The benefit will be better economics and faster service to customers both in Denmark and southern Sweden”

Carl Viggo Östlund, CEO, TNT Skandinavien¹⁶

Well-developed port operations

The Øresund region also has well-developed port operations. In addition to the port of Trelleborg, the merger between the ports of Copenhagen and Malmö to form Copenhagen Malmö Port makes it second largest in the Nordic Area after Gothenburg in terms of goods traffic with an annual turnover in excess of 13 million tonne.¹⁷ As a consequence, three of Sweden’s six largest ports for goods traffic are found in Scania of which Helsingborg is also one of the world’s largest ferry harbours for passenger traffic with 12 million passengers.¹⁸

Logistics junction

Thanks to its geographical position and good communications, the Øresund region is an excellent logistics junction for traffic in the entire Baltic area. Danish goods handling/logistics are ranked the world’s best after Singapore¹⁹ and in another survey Sweden was ranked the third best country in Europe²⁰. Scania is the natural transit region for a very large proportion of the goods flow to and from Sweden and a large part of Sweden’s exports are transported via Scania.²¹ Together with the high concentration of food industries and other factors this has resulted in the growth of transport and logistics in Scania. 20% of Swedish haulage contractors are found in Scania compared with around eleven per cent of the population.

2.3 Industrial climate²²

- ~ The Øresund region offers two types of industrial climate for the same market.
- ~ Favourable property prices and rent levels
- ~ The Øresund region has good access to risk capital

“We have a natural advantage in relation to our European competitors who still struggle with national borders.”

Jonas Gulliksson, CEO, Ström & Gulliksson²³

One market – two industrial climates

That which differentiates the Øresund region from national regions is that two nations’ industrial climates can be offered. This means that enterprises can locate on the side that best suits their needs while still having access to the entire market. To give an example – property prices are significantly lower on the Swedish side. This means that space-hungry enterprises can achieve lower investment costs by locating in Scania while at the same time maintaining good contact with the Danish side of the market. For companies that quickly need land on which to build new premises, Swedish processing of planning issues are far more decentralised than those in Denmark and are therefore often more flexible and quicker. Companies that wish to locate centrally in existing premises discover that rents are relatively much lower even in Copenhagen. The following table shows the costs of first class office premises in three cities.

Rent levels for first class offices²⁴

City	Cost per square metre per annum (2001)
Stockholm	SEK 2500-3500
Copenhagen	Approx SEK 2000
Malmö	SEK 1600-2000

The rent for first class offices in Copenhagen is around SEK 2000 per square metre per annum and is among the lowest among capital cities in Europe. Rents in Malmö have risen in line with the increased interest in the Øresund region but are still quite modest. The Swedish property index for 2001 shows that the office market in Malmö is the property market that offers the best overall yield before both Gothenburg and Stockholm, i.e. the office stock is valued highly.

Companies that have a demand that varies considerably as a consequence of the business cycle or dependence on public initiatives etc may need flexible human resources. They can benefit from the liberal Danish employment legislation. Denmark has the third best climate for companies in Europe in terms of legislation and wage levels (after Hungary and Switzerland).²⁵ Furthermore, companies which, as a consequence of a very competitive market, have low profit margins can benefit from Swedish corporation tax that is the lowest in the EU together with Finland and Ireland,²⁶ while at the same time being able to operate throughout the region.

Knowledge, Communication and Capital

The proximity to Kastrup and access to universities and institutes makes the region an excellent location for service companies directed at the international market. There is a great demand for services, access to manpower is good as is communication with the outside world. The number of service companies is increasing rapidly in the region.²⁷ Integration across the Øresund provides good opportunities for Scania being able to gain increased access to the risk capital available in the capital city area. The number of venture capital companies in Denmark has more than doubled since the middle of the '90s²⁸ and no fewer than eighty percent of the companies are found in Copenhagen. By joining forces the Stockholm and Copenhagen stock exchanges have created the fifth largest share market in Europe²⁹.

The Jobs & Society foundation's new company barometer placed the county of Scania third in Sweden in terms of new company registrations in the first part of 2002.³⁰ By comparison with the previous year, new enterprises have declined more or less across the country and even Scania as a whole has shown a marginal decline. However, in the city of Malmö the number of company start-ups increased by 10% during the period January-April 2002 compared with the same period in the previous year.³¹

2.4 Access to skilled human resources

- ~ An increasing number of companies are involved in services, knowledge and information while fewer and fewer work with physical production
- ~ The working population of the Øresund region is close on 1.7 million people
- ~ There are more than 20 universities and institutes
- ~ More than 130 000 students provide a good base for qualified human resources
- ~ Close on 10 000 researchers are active within the framework of what is referred to as the Øresund university
- ~ Proximity to 15 international schools
- ~ Ten MBA programmes in the region
- ~ In excess of 300 000 people with a foreign background

Knowledge and information increasingly important

An increasing number of people are involved in services, knowledge and information while fewer and fewer work in physical production. Work that is included in the term "knowledge and information" is research and development, surveys and analyses, marketing and advertising, and financial services. According to forecasts for 2010, more than 50% of the labour force will be working with knowledge and information, around 40% in services with only 10% in physical goods production.³² In the same way, a greater proportion of a product's value will be created through knowledge work. As a consequence of this, and as a reaction to increasing global competition, all products will tend to become more knowledge-intensive. This means that access to skilled and creative people will be the determining factor as to how successful a company will be. In traditional industries the opportunity for an employee to influence a company's future was relatively small but in the new knowledge society an individual person can have a considerable influence on a company's result.

Attractive labour market

Many recruitment benefits are created through integration across the Øresund. Surveys show that almost ninety percent of all recruitment is among people who already live in the actual region.³³ The fixed link across the sound and the favourable commuting facilities across the northern Øresund provide companies with better access to a greater quantity of qualified human resources thus reducing the risk of bottlenecks. It is also probable that the dynamic in the region contributes to enhancing the attraction for international manpower. The labour force in the Øresund region is close on 1.7 million people.³⁴

To attract international manpower it is important to be able to offer schooling with international curricula. There are ten international schools in Copenhagen alone. There are also plans on the Swedish side to establish further schools in Lund and Kristianstad in addition to the two in Helsingborg and Malmö. Within the framework of what is referred to as the Øresund university twelve universities collaborate on both sides of the sound and organise 130 000 students and close on 10 000 researchers.³⁵ In the region there are also further institutes with different specialisations.

To guarantee opportunities for qualified further education there are approximately ten different MBA programmes in the region that have both general and very specific curricula. Education in the Øresund region

is generally considered to be of very high quality and both the Copenhagen Business School and The School of Economics and Management, Lund University have been EQUIS-accredited (European Quality Improvement System) for a number of years.³⁶ Scandinavian International Management Institute (SIMI) is another example that offers both diploma and MBA programmes.³⁷

International manpower

The Øresund region is multi-cultural and has the highest density of immigrants in the Nordic Area. Just in Copenhagen and south-west Scania alone there are 300 000 people with a foreign background.³⁸ This means that the region has access to an extensive range of internationally-experienced and linguistically-capable manpower.

2.5 Market proximity and size

- ~ 3.5 million inhabitants
- ~ Very good proximity to the Baltic market
- ~ One of Europe's highest gross regional products per capita

The increased competition as a natural consequence of globalisation means that goods are specialised to an increasing degree in order to be the leaders within their areas. This means an increased requirement for an export market for goods in order to achieve a yield on the high development costs. There are 170 000 companies and 3.5 million people in the Øresund region who have a high purchasing power and thus constitute a strong local market. Migration into the region is extensive which further increases the size of the market and also contributes to meeting the need for manpower.

Because of its geographical position the region is a very suitable location for exploiting the entire Nordic market as well as other countries around the Baltic. The countries in the former Eastern Europe have experienced very favourable growth and it can be assumed that this will continue for some considerable time. A contributory reason for the forecast is the considerable Swedish and Danish investment made in areas such as the Baltic.

Productivity in the west Scania-Copenhagen area in particular is very high and, with a gross regional product per capita (GRP) of \$34 500 towards the end of the 1990s, Øresund was ranked as the third strongest region in Europe after Frankfurt-Mainz and Hamburg. On the same list Stockholm-Uppsala came in twelfth position with a GRP of \$28,000.³⁹

2.6 Quality of life

- ~ The importance of the quality of life increases when staff become more important to companies
- ~ One of the areas with the greatest number of museums in the world
- ~ World-class library loans
- ~ The Roskilde festival is Europe's biggest rock festival and the Copenhagen Jazz Festival attracts musicians from all over the world
- ~ 563 preserved mediaeval churches
- ~ Scania has 25% of Sweden's bathing beaches
- ~ A total of 90 golf clubs of which 50 are in Scania
- ~ Sweden is ranked among the five best countries in the world to live in
- ~ Copenhagen is one of the world's ten biggest congress cities
- ~ Modest property prices and high-quality accommodation

Popular tourist destination

As was said earlier, staff are becoming increasingly important to a company's results. This means that considerable demands are made on the employer to offer an attractive living environment with good access to culture, countryside and recreation. A good living environment often goes hand in hand with the tourist industry and the experience industry and, in this context, the Øresund region makes a very positive contribution. Tourism is also expected to be one of the strongest growth industries in the world in the next decade and, in Scania, the number of overnight stays increased by 13% in 2000. Tourism in the region already generates a turnover of SEK 28 billion and creates around 26 000 man-years of work which corresponds to just below two percent of the labour force.⁴⁰ Together Zealand and Scania offer more than 40 000 hotel beds among its 360 hotels. For visitors whose demands are more modest there are over 100 camping sites and more than 50 hostels.⁴¹

“...The Øresund region is a market place as big as Amsterdam or Berlin. It is growing fast and can attract the brightest of Europe’s youth with good skills in English. It offers excellent air and rail connections, relatively low housing costs as well as a beautiful and unexploited countryside plus bathing beaches within half an hour’s travelling time”

*New York Times*⁴²²

Copenhagen is also at the top in terms of the number of congresses. In 2001 the capital city was ranked as seventh among the world’s most popular congress cities.⁴³ One of the explanations is Scandinavia’s largest exhibition and congress centre in the form of the Bella Center in what is known as Ørestad – the new area adjacent to the Danish bridge abutment.⁴⁴

Broad cultural range

The culture sector in the Øresund region employs 36 000 people⁴⁵ and a further 25 000 work in activities that are closely associated with the industry. Overall this amounts to around four percent of the labour force. The large number of people who work in the industry make the Øresund region one of the areas with the greatest number of museums in the world. The following table shows the access to cultural institutions in the Øresund region.

*Cultural institutions in the Øresund region*⁴⁶

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

The total of 340 libraries in the Øresund region are very popular and the number of library loans per person per annum is among the highest in the world.⁴⁷

Music also plays a prominent role in the Øresund region and it has been arranging Europe’s biggest rock

festival, the Roskilde Festival, with 65 000 visitors⁴⁸ for many years. Another major event is the Copenhagen Jazz Festival – a ten-day event in July – with around 450 performances. Copenhagen also offers magnificent concerts since world-class performers choose the capital city as their stage.

Rich history and countryside

The Øresund region has a rich history evidenced by the close on 5000 recorded burial mounds from the stone and bronze ages and the 563 preserved mediaeval churches.⁴⁹ For those who temporarily tire of looking at the cultural and historical offerings Scania⁵⁰ offers 25% of Sweden’s bathing beaches. The countryside has immense qualities and, as an example, it can be noted that the future national park at Söderåsen is visited by around two million people a year compared with the one million visitors to the Skansen homestead museum in Stockholm.⁵¹

Sport and leisure

The Øresund region also has a lot to offer with its range of sporting and leisure activities. According to a survey in *Sydsvenska Dagbladet*, Malmö is the major city in Sweden that is most successful in terms of sport. Based on a weighting of different merits within most sports, the newspaper stated that, among Swedish towns with more than 100 000 inhabitants, Malmö is the one that has enjoyed most success in sport.⁵² In addition to three all-Sweden football teams, Scania also offers the proximity to FC København’s home matches at Idrottsparken, an arena with room for more than 40 000 spectators. The range of sporting and leisure activities in the area is extensive and includes a total of 90 golf courses of which 50 are in Scania.^{53,54}

High quality of life

According to UN’s ”Human Development Report” 2001, that studies the quality of life in 162 countries world-wide, Sweden is the fourth best country to live in. Denmark came in fifteenth place.⁵⁵ In another survey “Quality of life report”, produced by William M Mercer of the imercer firm of consultants, Copenhagen was ranked seventh best city in the world to live in. In the survey that covered 215 of the world’s largest cities, Stockholm and Oslo came in twelfth and fifteenth respectively. The report also ranks capital cities within the EU and, in this case, Copenhagen came second after Vienna. The survey is based on 39 different indicators where measures such as economic and social factors,

education, environment and culture formed the basis for measuring the overall quality of life.⁵⁶

2.7 Information technology and telecommunication

- ~ Sweden and Denmark are world leaders in information technology
- ~ Low costs of telecommunication
- ~ The IT university in Ørestad in Copenhagen
- ~ The Sigma company opened an IT college in Malmö in the autumn of 2000
- ~ The Scandinavian College of Communication⁵⁷ in Helsingborg combines informatics and IT skills in a unique education programme

Both Sweden and Denmark are among the countries in the world that are leaders in information technology. This can be measured by the number of computers per thousand inhabitants, the number of people with access to the Internet etc. All similar measures place Sweden and Denmark in the absolutely top layer in the world. This also applies to access to fax, telephone lines and mobile plus text TV.⁵⁸

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

Steve Ballmer, CEO Microsoft Corporation⁵⁹

Where telecommunications are concerned, the needs are very well provided for and the costs of telephony are low in both Sweden and Denmark. By comparison, Brussels is 2.5 times as expensive while in Hamburg and Berlin the costs are double.⁶⁰ Deregulation of the Swedish telecommunications market has led to greater price competitiveness between companies who all offer connections of very high quality. The price level for broadband access is significantly lower in Sweden by comparison with other OECD countries.

At the end of the year 2000 Sweden was ranked fourth among OECD countries in terms of broadband penetration. Denmark came in eighth place in the survey entitled “The Development in Broadband Access in OECD Countries” carried out by the OECD in 2001. The number of operators in Sweden varies among the regions but Scania, and the Malmö/Lund region in particular, rank highly together with other city authorities.⁶¹

The IT university in Copenhagen was established in 1999. The purpose of the school is to reinforce research and education in IT in the capital city region. In 2000 the foundation was laid for the future IT university that is planned to open in Ørestad on the Danish side of the sound. Investment costs for the building are estimated to be in excess of SEK 3 billion with the building expected to be ready in 2003. The intention is for the university to be extended with a research park.⁶²

The Scandinavian College of Communication in Helsingborg offers a unique education programme for communication and media studies. A further sign of the high level of maturity in information technology is the fact that the Sigma company started Sweden’s first IT college – Sigma College - in Malmö in the autumn of 2000.

3 The Øresund region as a growth area

3.1 The importance of clusters

THE IT INDUSTRY IN SILICON VALLEY, the textile industry in northern Italy, the hi-tech regions around Boston and North Carolina (“The Research Triangle”) in the USA are all examples of a concept often referred to as clusters. Clusters designate the concentration of activities that often arises within regions with very good opportunities for a particular industry. The Just-In-Time principle can be applied as a global strategy thanks to our improved communications between different parts of the world. The unreliability of deliveries increases however with distance and this is a contributory cause why the entire production system is created to satisfy the needs of the local market. Thus when companies set up abroad the suppliers tend to locate close to their customers in the same way as other companies set up close to the markets for their products. Seen overall this leads to increased cluster formation and agglomeration that has advantages in addition to shorter transport distances⁶³:

- ~ access to skilled human resources
- ~ supervision and specialisation between companies lead to effective activities
- ~ stocks can be reduced thanks to the proximity to suppliers and customers
- ~ economies of scale in purchasing, such as transport costs
- ~ communication between players is quicker and cheaper
- ~ searching for and dissemination of information is facilitated
- ~ uncertainty decreases since all players share the same information
- ~ common identity and knowledge culture
- ~ innovation is stimulated through the concentration of knowledge and resources

The advantages of concentrated research in cluster formations (economies of scale and scope, control of the innovation process and collaboration with local players) are considerable from a regional or national perspective. From a corporate viewpoint it is becoming more

common to benefit from good research environments in several regions for the purpose of gaining access to different technologies in order to create links between different innovation processes and to facilitate production, development of local markets plus collaboration with customers and sub-suppliers.⁶⁴

3.2 Cluster formation in the Øresund region

Maritime sector

The Maritime Development Centre of Europe (MDCE), is located in Copenhagen and organises the maritime sector in the region. The organisation has more than 100 Danish and around 20 Swedish members. The MDCE includes shipping companies, shipyards and suppliers, harbour companies, authorities, shipbrokers, chandlers, financial institutes, educational institutes and professional associations.^{65 66} The maritime industry employs around 85,000 people⁶⁷ in the region in a total of 600-700 companies. The Øresund region is also the seat of the UN organisation’s World Maritime University which offers a prominent MBA programme that attracts participants from around the globe.

Pharmaceuticals and Biotechnology

Pharmaceutical and biotechnology companies in the region generate a turnover of around SEK 32 billion and employ 32,000 people.⁶⁸ Today around 60% of Scandinavia’s pharmaceutical, biotechnology and biomedical companies are located in the Øresund region. The region holds third place in Europe through its scientific strength in the area and the ten university hospitals are an important collaboration partner for commerce and industry.⁶⁹ The industry is organised as the Medicin Valley Academy, a collaborative organisation for more than 250 members at present.⁷⁰ The organisation’s task is to promote development in the industry by profiling the region internationally and by providing a forum for collaboration between universities, companies and public authorities.

“The Copenhagen region and the southern part of Sweden, also referred to as Medicin Valley, is world class in biotechnology and pharmaceuticals”

James C Mullen, Group President, Biogen⁷¹

IT, Telecommunication and Electronics

Øresund IT Academy was started in November 1999 by Øresund university and Øresund Business Council. The organisation's board is divided equally between the university and commerce and industry and its objective is to provide a common collaboration platform for IT companies and universities in the same way as Medicon Valley is for the pharmaceutical industry.⁷² It is estimated that there are around 1000 companies with a total of 96 000 employees within the IT industry in the region. This makes the region the largest IT cluster in Scandinavia.⁷³

Foods

Øresund Food Network was started by Øresund university with the same intentions as the Øresund IT Academy and Medicon Valley. Places on the board are equally divided between the university, commerce and industry, and the authorities.⁷⁴ Øresund Food Network concentrates on five areas – quality and food safety, process technology, foods and health, biotechnology and logistics.⁷⁵ The food industry employs 57 000 people in Scania and is the region's biggest industry. There are close on 3 000 small to medium size food companies in southern Sweden and close on half the Swedish food industry is located in the Scania region.

Environment

Øresund Environment is a newly established environmental network for research, commerce and industry, and the public sector. The initiative for Øresund Environment was taken in 2000 and its objective is to establish a model for cross-border collaboration in the environment and to develop environmental awareness in the Øresund region.⁷⁶ Sweden and Denmark are world leaders in environmental management⁷⁷ and the region has a high level of skills linked to the universities but also to the EU's environmental authority in Copenhagen and to companies. Together with London, the Øresund region holds a leading position in environmental research in Europe.⁷⁸

International organisations

In Copenhagen a large proportion of the workforce has international experience. This is reflected by the relatively high number of international organisations that are established in the city. There were 13 of these in 1998 while Stockholm, for example, had eight. Among the international organisations in Copenhagen are WHO's European office, UNICEF Supply Office,

EU's environmental authority and The Baltic Ports Organization.⁷⁹ Scania's multicultural composition can play a major and positive role in attracting international organisations to the region.

3.3 The Øresund region's scientific strength

Innovation environment

Several prominent economists, including Jeffrey D Sachs from the USA, contend that it is most important from a growth perspective in the developing countries to quickly absorb and assimilate new technology, whereas the industrialised countries are dependent on their innovative capacity to create continued growth.⁸⁰ Where investment and development as a proportion of GDP are concerned, Sweden and Denmark hold first and ninth places respectively in the world.⁸¹ Sweden is at the top of among EU countries while Denmark is ranked third in the EU Commission's European Innovation Scoreboard 2000 (EU Commission, 2001). Furthermore, south Sweden was also awarded the 2002 European Commission's "Award of Excellence for Innovative Regions" for the second year in a row. The award is based on around 20 criteria including innovation climate, number of patents, number of research organisations as well as financial, administrative and legal structures.⁸²

"Many leading companies are located in the Øresund region. This is in addition to the region having a great deal to offer in terms of higher education in the form of several institutes, universities and education facilities"

*Ludwig Hedlund, General Manager,
Northern EuropeSun Java Center⁸³*

Scientific Region

The capacity to innovate is greatly dependent on the scientific strength and the ability to interact with other strong regions. As a consequence of the Øresund region's good communications it is relatively easy to have a continuous interchange with other regions. Both Sweden and Denmark hold leading positions in terms of scientific production and impact in the research world. If production is measured by the number of published articles in scientific literature in terms of the population, Sweden comes third and Denmark comes sixth in the world. Impact is measured by studying how often an article is quoted in other articles. This shows

that Sweden holds second position in the world while Denmark comes in at number four. In both these prominent countries the Øresund region is the strongest area while Stockholm-Uppsala comes second. The following table shows Europe's scientific centres measured by the number of articles published in scientific journals in the period 1996-98.

This shows that the Øresund region's 10 000 researchers are widely published:

*Number of published articles during 1996-98 in science, technology and medicine.*⁸⁴

Region	Number of articles
1 London	67 333
2 Paris	49 438
3 Moscow	45 579
4 Berlin	24 514
5 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 is characterised by its strong global positions in terms of the production of articles in the areas of medicine, nuclear physics and particle physics, and the environment. It also holds leading positions in Europe within several other areas including technology and engineering subjects.

In terms of global comparison the Øresund region's scientific production takes an honourable 14th place whereas London, Tokyo/Yokohama and the San Francisco area are the three winners. The Øresund region comes tenth in the world if the number of references in dissertations is taken as a measure of the impact of the region's research.⁸⁵

3.4 Technology parks and research villages

THE IDEAS AND INVENTIONS that are generated by the region's universities and institutes must be further developed to provide innovations by making them commercially adapted and available. To facilitate and secure this flow there are several technology parks and research villages in the region. Most of them have been created after the successful and internationally known Ideon research village located next to Lund University and which is now established in Malmö as well. Ideon is among Europe's largest research villages and has 165 companies at present.⁸⁶ There are several technology parks in the Øresund region and this guarantees that new ideas are further developed and commercialised. The technology parks also provide an interface between hi-tech areas which means that they also function as individual innovation centres.

3.5 Forecasts for the region's growth

Economic growth

After the levelling off in the business cycle in 2001 new figures now show that growth in the region is on its way up again.⁸⁷ Commerce and industry in the Øresund region are showing new optimism and the forecast for annual GRP is 2% for 2002 and 3.5% for 2003.⁸⁸

There is a great number of assessments concerning growth in the Øresund region. Perhaps the most interesting is the confidence in the future and optimism that they express. Comprehensive integration is expected to lead to an increase in the gross regional product (GRP) of ten percent in Scania and two percent in Zealand.⁸⁹ The present value of integration over the next 30 years is estimated at SEK 400 billion.⁹⁰ Added to this will be the contributions that the great interest in the region already generates.⁹¹

“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 Kiel”⁹²

Employment and human resources

According to the County Employment Board's autumn forecast for 2002, job opportunities in Scania are expected to increase by 1.7% in 2003 and 2004. The forecast for the Øresund region up to and including 2008 shows a significant increase in employment on the

Swedish side. Employment in Scania is expected to rise by more than 8% whereas employment on the Danish side is expected to rise by up to 3.5%. This corresponds to increases in employment opportunities of 43 000 and 39 000 respectively.⁹³

The construction market

It is estimated that around DKK 90 billion (approx SEK 100 billion) will be invested in the region's infrastructure over the next ten years. One example is Copenhagen's Metro that opened in October 2002. Other work in progress and future projects include Citytunneln in Malmö, investment at Kastrup plus the expansion of ports, railways and roads.⁹⁴

The major infrastructure investments are expected to be followed by 30 000 new homes in the Malmö area over the next ten years. Skanska's forecast is that housebuilding in Scania will increase by ten percent per annum.⁹⁵ The total building investment in Scania fell somewhat in 2002 but is expected to increase by no less than 13% in 2003. Sveriges Bygginindustrier's forecast for total construction and plant investment in the next two years indicates that it will be other construction (not housing or plant) where growth will be strongest. Stronger economic growth will principally affect investments in the Malmö/Lund region.⁹⁶

The more or less advanced plans that exist for the development of the infrastructure within as well as to and from the Øresund region will further enhance the region's attractiveness. The projects concerned are a fixed link across the Fehmarn Belt, a tunnel between Helsingborg-Helsingør and a high-speed rail link between Stockholm and Hamburg via Jönköping, Helsingborg and Copenhagen.

Health, Pharmaceuticals and Biotechnology

According to Medicon Valley's earlier forecasts, ten companies a year will locate within the area. Nine new biotech or biomedical companies started in 2001 and the growth that started at the end of the 1990s is expected to continue for a number of years in the 2000s.⁹⁷ At present there are 108 biotech companies and their annual export value amounts to SEK 4 billion. According to Medicon Valley Academy the growth in the sector in 2001 was relatively good despite the economic levelling off elsewhere in the world. Expectations of the future remain high and growth within biotech industries is expected to continue.⁹⁸

Wholesale and Retail trade

There is great interest in the region for establishing and expanding a large number of factory outlets or major shopping centres. A total of 340 000 square metres of shopping space is planned for the Øresund region.⁹⁹ To give an example, the new Nova shopping centre located on the outskirts of Lund was opened in September 2002. Last year a number of Swedish and international chains became established in the Scania region including the Swiss building materials department store, Bauhaus.

Foods

Growth in productivity has increased in recent years and is now well above the European average.¹⁰⁰ The food industry had great potential and the establishment of the Øresund Food Network has created further opportunities for increased growth through developments in functional food etc. The business cycle in the food industry points steadily upwards and, in a survey presented in Øresundsbarometern No. 9, exports are expected to increase at the end of 2002.¹⁰¹

IT, Telecommunication and Electronics

After a global downturn in the IT industry in 2001 and the beginning of 2002 expectations in the region for the coming years are rising. Expectations among consultants and industry are that a significant recovery will take place during 2003. Industry shows the greatest optimism and expects a significant increase in demand on both the export and the domestic markets as early as autumn 2002. The increased demand means that production will start to rise again.¹⁰²

4 Integrating commerce and industry

Integration benefits companies

Integration in the Øresund region will take time. It will probably take ten to twenty years before we can talk about a common housing and labour market in the region. Political initiatives to facilitate integration have been few and ineffectual. Nonetheless there is a strong willingness among people and companies to integrate. Bearing in mind how many companies have crossed the sound there is justification for saying that commerce and industry lead the integration.

“Lund is an excellent starting point for getting established in Sweden ... Here you'll find a good market, skilled people and closeness to Copenhagen”

Steen H. Knudsen, CEO, Maersk Data¹⁰³

In addition to being able to exploit the best of a dual industrial climate (see Section 2.3) there are several important strategic advantages for a company in an integrated Øresund region.

These advantages arise from economies of scale and scope. In more concrete terms this means:

1. Integration gives companies in Scania and Denmark access to a significantly larger market. This is accessible without having to build up an autonomous organisation on the other side of Øresund. It will therefore be possible to penetrate a new market at relatively low investment costs while, at the same time, management and other common functions can be consolidated. Perhaps more simply – there are two variants of integration. Service companies can integrate by establishing an office on the other side of the sound and getting closer to their customers as a result while goods-producing companies can gain economies of scale by concentrating production on one side of Øresund.
2. With the greater market it will be possible for companies with a greater degree of specialisation to have a better market for their goods and services and this will improve the overall supply in the region.
3. Since there will also be a common labour market companies will have better production prospects in the form of increased access to qualified and specialised manpower.

4. A very tangible physical benefit of the Øresund bridge is the logistics advantages gained by having common distribution systems for the entire Øresund region and that transport can be optimised with respect to the degree of loading for example. An example that can be quoted is that bread deliveries to McDonalds' restaurants through the entire region are managed by a single bakery (Sjöholms bröd) on the Swedish side of the sound.
5. In the integrated Øresund region there is also an increase in the potential for building alliances with companies within the same industry and the associated synergy effects and sharing of risk-taking and development costs. The Øresund Chamber of Commerce and Industry has taken the initiative for “Näringslivets Öresundsindex”, that describes how far integration has progressed each year. An interesting result from the 2002 measurement is that companies in Scania and Zealand collaborate almost as much with each other as with companies in Stockholm and Jutland.¹⁰⁴

The following provides a number of examples of how commerce and industry have taken the lead in different types of integration. This list provides just a small selection but there are significantly more examples. Statistics Sweden has found that 32% of the Swedish companies and 18% of the Danish companies have some form of activity on the other side – from marketing to complete setting up.¹⁰⁵

“I do not perceive any marked differences between the Danish and the Swedish – it's the small idiosyncrasies that add sparkle to everyday life”

Lars Karlsson, CEO, Copenhagen Malmö Port¹⁰⁶

Companies integrated

FOODS

- ~ The Arla and MD Foods companies have merged to form Arla Foods.
- ~ Steins Laboratorium AB and the Swedish dairy company MSAB plan a merger.¹⁰⁷
- ~ Nordfalks (Sweden) and the Federation of Danish Pig Producers and Slaughterhouses' Joint

- Purchasing Association is forming a joint foods group.¹⁰⁸
- ~ Vin & Sprit AB has purchased Danisco Distillers (De Danske Spritfabriker).¹⁰⁹
 - ~ Swedish and Danish dairy products are being marketed on the other side of the sound.
 - ~ Skåne-möllan has acquired 25% of the Danish flour producer Mel-compagniet in Esbjerg.¹¹⁰
 - ~ The Danisco food company and the Danish service giant ISS have set up in Scania.
 - ~ The Swedish brewer Kopparbergs has set up in Denmark, Kopparbergs Danmark APS.¹¹¹
 - ~ MalacoLeaf has its head office in Malmö but is concentrating its production at its plant in Slagelse on Zealand.
 - ~ The Danish company Danägg and Swedish Kronägg plan to merge no later than in 2004.¹¹²
 - ~ The foods company Cerealia has acquired the Danish Schulstads bakery.¹¹³
 - ~ The Skånekött foods company has become established in Denmark through the acquisition of Kreatina outside Køge.¹¹⁴
 - ~ The foods company Finax in Helsingborg has acquired a share in the Dansk Detail Salg sales company.¹¹⁵
 - ~ The Danish slaughter business DAT-SCHAUB has taken over part of Swedish KHi Ellco Foods AB.¹¹⁶

IT, TELECOMMUNICATIONS AND ELECTRONICS

- ~ The consulting firm of Resco AB has formed a new unit, Resco Öresund, as a consequence of reorganisation and views this as a step on the way to becoming established on the Danish market.¹¹⁷
- ~ The IT company Sema Group AB has formed an Øresund business area by opening its new office in Copenhagen.¹¹⁸
- ~ The Swedish IT companies Frontec, Cell Network, Adcore, Sigma, VM-data and Netch have set up in Copenhagen by opening local offices or through acquisitions.¹¹⁹
- ~ The Danish PC manufacturer Amitech plans to become established in the Swedish market and has therefore entered into an agreement with the

- Swedish rental chain Thorn.¹²⁰
- ~ The data and telephony operator Utfors has set up on the Danish market.¹²¹
 - ~ The Swedish IT company Prevas with offices in Malmö has opened a branch office in Copenhagen.¹²²
 - ~ Apptus Technologies has joined forces with three Danish software and consultancy companies to form NordITech. The purpose of the alliance is to launch a new sales collaboration initiative where the four companies complement each other.¹²³
 - ~ The Danish risk capital company Olicom has invested in the Ideon company Scalado.¹²⁴
 - ~ The broadband company Trygghetsbolaget is negotiating with a Danish broadband operator and this would mean a first step outside Sweden.¹²⁵
 - ~ The Malmö company connectBlue is the first Swedish company to become a member of ITEK (the Danish trade association for companies in IT, telecoms, electronics and communication).¹²⁶
 - ~ The Swedish company Vioma has entered the Danish market with solutions for content management.¹²⁷
 - ~ The Malmö-based software company Chainformation sells products on the Danish side.¹²⁸
 - ~ The IT company Konftel collaborates with Dansk Data Diskplay A/S.¹²⁹

- ~ The Danish IT consultants Consit A/S have opened a subsidiary in Sweden.¹³⁰
- ~ The IT consultant Excanto has offices in both Malmö and Copenhagen.¹³¹
- ~ Mercury Group has acquired the software company Idesta's Copenhagen office and uses this as a base for its expansion in southern Sweden.¹³²

CONSTRUCTION AND PROPERTIES

- ~ The brick manufacturer Egersund Tegl has purchased 50% of Tegelmästaren i Skåne AB.¹³³
- ~ Lightweight concrete manufacturer H+H International A/S has established a sales office in Malmö.
- ~ Swedish construction and property companies, including Skanska, NCC and Wihlborgs, are major players in Denmark.

- ~ EjendomsSelskabet Norden has acquired several properties in Malmö.¹³⁴
- ~ Building markets from the Danish side have become established in Sweden – these include Bygma and A/S Harald Nyborg.¹³⁵
- ~ SvenskDansk Fastighetsförmedling is a network with several estate agents from Scania and Denmark.¹³⁶
- ~ The Danish property company Ordrupdal has acquired properties in Ljungbyhed, Scania.¹³⁷
- ~ The Swedish architect bureau White Arkitekter has become established in Copenhagen.¹³⁸

HEALTH, PHARMACEUTICALS AND BIOTECHNOLOGY

- ~ The Malmö-based medical company Galenica has established a Danish subsidiary.¹³⁹
- ~ The pharmaceutical company Spadille A/S has chosen to expand on the Swedish side of the sound.¹⁴⁰
- ~ The medico-technical company Stryker A/S is integrating its Danish and Swedish customer service organisation in Malmö.¹⁴¹
- ~ Danska Sundhedsguiden.dk is launching a health gateway in Sweden.¹⁴²
- ~ The Norwegian biotech company Nutripharma with its new head office in Copenhagen has now moved across the sound and is to be found at Ideon.¹⁴³
- ~ Danish Scantox A/S and south-Swedish Clinical Data Care AB collaborate across the sound.
- ~ Ferring pharmaceuticals, has its head office in Denmark and production in Scania.
- ~ The Danish medical company Medicon has become established in Helsingborg.¹⁴⁴
- ~ The Danish pharmaceuticals manufacturer Copyfarm has set up in Arlöv outside Malmö.¹⁴⁵

BANKING AND FINANCE

- ~ Malmöhus Invest AB has initiated a joint project with the Danish/Swedish Öresund Health Care A/S.¹⁴⁶
- ~ Merita Nordbanken and Unibank have merged.
- ~ Svenska Venturefonden EQT Scandinavia has purchased several Danish companies.¹⁴⁷

- ~ SEB is investing in Danmark och Provinsbanken (Danske Bank) in Sweden.¹⁴⁸
- ~ SEB and Handelsbanken have Internet banks in Denmark.¹⁴⁹
- ~ FöreningsSparbanken is the majority owner of FI-Holding A/S.
- ~ The Danish capital management company Treviso, owned by Unibank, has established an office in Malmö.¹⁵⁰
- ~ Intellecta, with its focus on investor relations, has become established in Copenhagen.¹⁵¹
- ~ Handelsbanken has purchased the Danish regional bank Midtbank.¹⁵²
- ~ The Danish risk capital company Danske Venture Partners, has invested in the Swedish IT company Appium.¹⁵³

CORPORATE SERVICES

- ~ A'jour Klip Gruppen is a Danish news monitoring company that monitors and distributes Swedish and Danish news on both sides of the sound.
- ~ The two firms of lawyers Qvist-Stanbrook and Brorström & Partners have merged.
- ~ Recall Group A/S has opened an office in Helsingborg.
- ~ The media analysis company Millward Brown Danmark has taken over the licence for Millward Brown in Sweden and, at the same time, has made the Danish office in Copenhagen its head office.¹⁵⁴
- ~ The Swedish copyright bureau Albihs has established a Danish office.¹⁵⁵
- ~ ID, design och kommunikation ab (Sweden) has merged with the Danish company Marcom.¹⁵⁶
- ~ The advertising agency Thörn & Täckenström has established a Copenhagen office.¹⁵⁷
- ~ Öresundsbyråen is a Swedish/Danish advertising agency.¹⁵⁸
- ~ The Danish company OFIR.com (job adverts on the Internet) has opened an office in Malmö.¹⁵⁹
- ~ The Danish consultancy and recruitment company Cultivator has established an office in Landskrona.¹⁶⁰
- ~ The human resources and recruitment compa-

- nies Poolia, Manpower and Proffice have become established in Copenhagen.¹⁶¹
- ~ The well-known management company McKinsey's branch in Copenhagen has opened an office in Malmö.
 - ~ The Swedish technology consultants Semcon have set up in Denmark.¹⁶²
 - ~ The Swedish technology consultants Benima have opened an office in Copenhagen.¹⁶³
 - ~ The global consultancy company BearingPoint has moved its Malmö office to Copenhagen so that it can provide better coverage in Denmark and southern Sweden.¹⁶⁴
 - ~ A number of auditing and consultancy firms, including Ernst & Young, Deloitte & Touche, Price Waterhouse Coopers and KPMG have created special Öresund groups or collaborate between their Danish and Swedish offices.
 - ~ The Swedish consultancy company Retention is buying the Danish communications bureau Com-Care in Copenhagen.¹⁶⁵
 - ~ The communications company KREAB has formed an organisation called KREAB Öresund, with its head office in Copenhagen and a branch in Malmö.¹⁶⁶
 - ~ Språklink offers training in Swedish and Danish to companies on both sides of the sound.¹⁶⁷
 - ~ The PR agency Aspekta with its head office in Malmö has opened a branch in Copenhagen.¹⁶⁸
 - ~ The Danish company Uttenthal that works with graphic production has become established in Malmö.¹⁶⁹
 - ~ The training company AcadeMedia has signed an outline agreement with the employment exchange in Greater Copenhagen.¹⁷⁰

WHOLESALE AND RETAIL TRADE

- ~ The Danish shop chains of Matas (health care), BR Leksaker, Carli Gry (clothing), Ivan Grundahl and Bitte Kai Rand (clothing) have become established on the Swedish side.¹⁷¹
- ~ The clothing chains JC and MQ plus the shoe chain Din Sko opened their first shops in Denmark in October 2000.¹⁷²
- ~ The Swedish company Biltema is opening shops in Ålborg and Næstved.¹⁷³

- ~ The Danish Synoptik chain has acquired shops in Sweden.¹⁷⁴
- ~ The Danish shoe chain Shoe-division has its eye on the Swedish market and, according to Sydsvenska Dagbladet, is planning significant acquisitions in the coming year.
- ~ The Danish company Netto has opened several shops in Scania including those in Trelleborg, Malmö and Lund.
- ~ Retailia offers consultancy services to both Swedish and Danish retail companies.
- ~ Ilva, Denmark's second largest furniture chain, plans to become established in Malmö.¹⁷⁵
- ~ International Motors in Helsingborg imports cars from Daihatsu and Subaru for both the Swedish and the Danish market.¹⁷⁶

TRANSPORT, LOGISTICS AND HOTELS

- ~ Copenhagen Port and Malmö Port have merged to form Copenhagen Malmö Port (CMP Port).
- ~ Taxi Motor (Denmark) and Taxi Kurir (Sweden) have merged through partial acquisition.¹⁷⁷
- ~ The Mayfair Hotel Copenhagen has acquired Hotell Tunneln in Malmö.¹⁷⁸
- ~ Danish DSB has established a subsidiary in Sweden.¹⁷⁹
- ~ The Danish travel agent Star Tours has established Sturup as a permanent departure location for the company's charter flights.¹⁸⁰
- ~ Kastrup and Sturup have initiated collaboration.
- ~ Danska Gråhundbus carries passengers to Sturup and even Bornholm, via Ystad.

MEDIA

- ~ Sydsvenska Dagbladet and Berlingske Tidende collaborate closely within different areas.
- ~ Radio Malmöhus/Radio Kristianstad and Københavns radio work together.¹⁸¹
- ~ The electronic newsletter Rapidus has become established with the Öresund region as its coverage area.
- ~ The news agency "Nytt från Öresund" provides news from business, commerce and society to the media, companies and other interested parties.¹⁸²

- ~ The Danish magazine *Ingeniøren* has entered the Swedish newspaper market.¹⁸³
- ~ The film production company *Scandvision Film* has expanded its Danish market share considerable via its Malmö office.¹⁸⁴

MISCELLANEOUS

- ~ The toy manufacturer *Brio* has acquired 25% of the Danish games manufacturer *YES*.¹⁸⁵
- ~ *Öresundskraft* is investing in the Danish market.¹⁸⁶
- ~ *Royal Scandinavia* distributes hand-crafted goods worldwide from a central location in Malmö.¹⁸⁷
- ~ *Svenska Posten* and *Post Danmark* have been collaborating in the Øresund region since 1 July 2000.¹⁸⁸
- ~ The refuse collection company *Ragnsells* in Denmark and the Swedish company *Däck Rec* work together.¹⁸⁹
- ~ *Malmö Musikteater* and *Det Kongelige Teater* in Copenhagen work together on an opera project.¹⁹⁰
- ~ Scanian patent bureau *Ström och Gulliksson AB* has joined forces with Denmark's largest patent bureau *Plougmann & Vingtoft & Partners*.
- ~ The Swedish travel agent chain *STG Resebyråer* is working together with the Danish company *Spies*.
- ~ *MBE (Mail Boxex Etc)* that operates as a private post office has gone across the sound and is now in Malmö, Helsingborg and Lund.¹⁹¹
- ~ Machine manufacturer *Hilti* now has the same functions for the Swedish and Danish *Hilti*.¹⁹²
- ~ The Danish fitness company *Team Hyldahl* has become established in Malmö through its subsidiary *Svea Fitness AB*.¹⁹³
- ~ The Danish kitchen manufacturer *Kvik* has opened a shop in Malmö.¹⁹⁴
- ~ The waste company *Sysav Kemi* exports waste oil to *Dansk Olie Genbrug*.¹⁹⁵
- ~ Conference arrangers *Bella Center* and *MalmöMässan* are discussion collaboration.¹⁹⁶
- ~ *Svendla Lim* in Landskrona has acquired the Danish glue manufacturer *Frede Andersens Fabriker A/S*.¹⁹⁷

- ~ The packaging company *JD Stenqvist* has acquired the Danish bag manufacturer *Unibag*.¹⁹⁸
- ~ *PLM* supplies aluminium cans to the Danish market from its production department in Malmö.¹⁹⁹
- ~ The Swedish company *ElektroSandberg* and Danish *KE Partner* work together.²⁰⁰
- ~ The Lund-based neoswing-club *Club Hep Cat* has become established in Copenhagen.²⁰¹
- ~ The Danish map company *Kark* has integrated *Scania* on its website.²⁰²

5 Companies that have set up in the Øresund region

“Together the region constitutes a critical mass that can now grow by itself in the new Europe”

*Jørgen Birger Christensen,
Chief Economist, Danske Bank²⁰³*

There is a large number of companies that have become established in the Øresund region as a consequence of the development that has already started and which is expected to accelerate. The following list makes no claims to being complete.

FOODS

- ~ The convenience foods company Villman och Co is now established in Vellinge²⁰⁴
- ~ The dairy products company Danone in Malmö
- ~ United Biscuits
- ~ Cargill Foods
- ~ Unilever from Stockholm to Helsingborg
- ~ Sardus head office from Stockholm and Halmstad to Helsingborg²⁰⁵
- ~ Seven Eleven has begun the establishment of 30 shops in Scania²⁰⁶
- ~ The hamburger chain Max from Luleå is now established in Scania²⁰⁷

HEALTH, PHARMACEUTICALS AND BIOTECHNOLOGY

- ~ Euromedica has opened an office in Copenhagen²⁰⁸
- ~ Løvens Kemiska – Denmark’s third largest medicine manufacturer – has chosen Malmö as a new base for its activities²⁰⁹
- ~ The American listed company Cooper Surgical has purchased the Scanian company Medscand Medical in Malmö.²¹⁰
- ~ The American biotech company Biogen has established a centre in Hillerød north of Copenhagen.²¹¹
- ~ The medico-technology company Meditelligence has opened an office in Malmö.²¹²
- ~ The Danish company Orifarm A/S has moved its Swedish head office from Stockholm to Malmö.²¹³

- ~ Pfizer Pharmaceuticals established its head office for the Nordic area and Benelux in the region in 1998.²¹⁴
- ~ CIPHERGEN Biosystems Inc. has established an organisation with responsibility for all of Scandinavia, Finland and the Baltic.²¹⁵
- ~ Glaxo Smith Kline, head office for northern Europe in Malmö.²¹⁶
- ~ Eli Lilly²¹⁷
- ~ Bristol Myers²¹⁸
- ~ Bayer has moved its Scandinavian head office from Stockholm to Copenhagen.²¹⁹
- ~ Medarex Inc has chosen to locate its European subsidiary Genmab A/S in Copenhagen.²²⁰
- ~ The American company Maxygen became established in Denmark in May 2000 through the acquisition of ProFound Pharma and, at the same time, moved its head office for its pharmaceuticals division from Silicon Valley to Copenhagen.²²¹
- ~ Novo Nordisk Farmaka has concentrated its entire Scandinavian sales organisation in Malmö.²²²
- ~ The Norwegian company Nutri Pharma has established an office in Copenhagen.²²³

IT, TELECOMMUNICATIONS AND ELECTRONICS

- ~ Sun Microsystem AB has established a new unit in the Øresund region that will operate in both the south of Sweden and Denmark.²²⁴
- ~ The technology consultancy company ProTang has established an office in Malmö that will operate as the company’s Øresund office.²²⁵
- ~ Orange Sverige had its head office in Malmö, but has closed down its Swedish activities.²²⁶
- ~ The IT consultancy company Meteorit directed at systems development has opened an office in Malmö. The company will also be established in Copenhagen in the long term.²²⁷
- ~ AddPro has become established in Malmö.²²⁸
- ~ Commerce One (B2B, e-commerce solutions)

- has established its Nordic head office in Copenhagen.
- ~ Maersk Data, industrial giant A.P Møller's IT company, has taken over the Malmö company ItAssign and Framfabs office in Lund, as part of its investment in the Swedish market.²²⁹
 - ~ The American IT group Intel plans to build a new head office for its Danish subsidiary Giga outside Copenhagen.²³⁰
 - ~ Exedra Communication AB has established a call centre at Business Center Öresund, Landskrona.²³¹
 - ~ The IT consultancy company mindcom with its focus on development, technology and implementation has opened an office in Malmö.
 - ~ British Colt Telecom has opened a branch in Copenhagen.²³²
 - ~ The IT consultancy firm Infogator has opened an office in Malmö.²³³
 - ~ The Swedish consultancy company Cyber Com has become established in Denmark.
 - ~ The American IT company Stream International has established its first Scandinavian office in Helsingborg.²³⁴
 - ~ T-systems has become established in the region through the acquisition of Primix Solutions, with the business concept that the entire Øresund region will be the company's home market.
 - ~ Arrowhead (including Internet) has an office in Malmö and has opened one in Denmark.
 - ~ Dell Computers who offer network solutions etc to companies are now in Denmark as well.
 - ~ Sun Microsystems has located a Sun Java Center in Malmö and Copenhagen.²³⁵
 - ~ Contents supplier Inovit AB has become established in the Øresund region.²³⁶
 - ~ Data service company NL Partner has moved its marketing department from Stockholm to Malmö.
 - ~ The IT marketing company InfoOne has opened a call centre in Kristianstad.²³⁷
 - ~ The Internet company Linq opened its Malmö office in 1999 and works together with its older office in Copenhagen.²³⁸
 - ~ The consultancy company Sema Group has formed a business area that covers Halland, Scania and the Copenhagen region.²³⁹
 - ~ Växjö-based Improve has become established in Malmö.²⁴⁰
 - ~ Dagaz, with its focus on safety/security, has become established in Malmö.²⁴¹
 - ~ eQualitySolutions started up in Malmö in August 2000.²⁴²
 - ~ Handelsbanken has moved parts of its data activities to Malmö.²⁴³
 - ~ The IT consultancy company Netlight has become established in Malmö.²⁴⁴
 - ~ Satsafe, who work with positioning via mobile phones has established an office in Malmö.²⁴⁵
 - ~ SoftwareInnovation opened a branch office in Malmö in August 2000.²⁴⁶
 - ~ The telecoms company Alcatel established its Nordic centre for 3G mobile phones in Malmö.²⁴⁷
 - ~ The Internet company Artisan, with its head office in Växjö, has opened an office in Malmö.²⁴⁸
 - ~ Web agency Attraction has become established in Malmö.²⁴⁹
 - ~ Telematics company Doubleway has become established in Malmö.²⁵⁰
 - ~ Technology consultancy company BlueLabs has opened an office in Malmö.²⁵¹
 - ~ Nasdaq-listed IT company Citrix Systems has established its Nordic head office in Copenhagen.²⁵²
 - ~ The electronics company Partnertech has moved its head office to Malmö.²⁵³
 - ~ Zepto Computers manufactures notebooks and has become established in the Øresund region.²⁵⁴
 - ~ Fiberdata, part of TurnIT, has become established in the Øresund region through its acquisition of Elservice i Trelleborg AB.²⁵⁵
- “Like many business people, I see an incredible amount of potential in the Øresund region”**
Hasse Wallman, CEO, Wallmans Nöjen AB²⁵⁶

LOGISTICS AND TRANSPORT

- ~ The Spanish steel producer Acerinox Scandinavia AB has established both a warehouse and service office in Malmö with the intention of covering the entire Baltic area.²⁵⁷
- ~ Toyota is moving its import and logistics activities for the entire Nordic area and the Baltic to Malmö.²⁵⁸
- ~ Maersk Sealand has opened a local office in Helsingborg.²⁵⁹
- ~ Logistica consultants Top Logic has established offices in Malmö and on the Danish side of the sound.²⁶⁰
- ~ DFDS Transport AB's Swedish head office is in Malmö.

CORPORATE SERVICES

- ~ Concours Cepro AB, who offers external activities advice and business development has become established in the Øresund region.²⁶¹
- ~ The American call centre company Sitel has opened an office in Copenhagen.²⁶²
- ~ Mat på jobbet established its service function last year with food and snacks for refrigerators and freezers for corporate customers in the Malmö region.²⁶³
- ~ The service company Big image has become established in Malmö.²⁶⁴
- ~ The media production company Citat plans to establish a regional office in Malmö.²⁶⁵
- ~ The advertising agency Nordengren with its registered office in Stockholm has opened an office in Malmö.²⁶⁶
- ~ The management consultancy bureau Distinct Consulting, with offices in Stockholm and Copenhagen, is now also established in Malmö.²⁶⁷
- ~ The human resources company Arena Personal has established an office in Malmö.
- ~ The human resources company Labteam, with its head office in Uppsala, has become established in Lund.²⁶⁸
- ~ Ernst & Young has moved its European VAT centre to Malmö.²⁶⁹
- ~ The advertising group A-com is expanding its activities and is opening Sandberg Media Synergi in Malmö.²⁷⁰

- ~ The recruitment company Alumni is opening an office in i Malmö.²⁷¹
- ~ The Norwegian customer services company Multipartner has located its Swedish head office in Malmö.²⁷²
- ~ The PR company GCI Mannov is in Malmö and Copenhagen.
- ~ The German PR company Ehrenberg is in Malmö and Copenhagen.²⁷³
- ~ The PR agency Heimbürger is in Helsingborg (has been acquired by the Danish advertising agency Nørgaard Mikkelsen).²⁷⁴
- ~ The PR agency Journalistgruppen has become established in Malmö.²⁷⁵
- ~ The PR company JKL is now established in Copenhagen.²⁷⁶
- ~ The PR agency Raptor has opened an office in Malmö.²⁷⁷
- ~ The advertising agency lydeking.stockholm has established an office in Copenhagen.²⁷⁸
- ~ The recruitment firm of Hammer & Hanborg has opened an office in Malmö.²⁷⁹
- ~ Thulin rekrytering has opened an office in Malmö.²⁸⁰
- ~ Kalmar-based Capita Urval has established an office in Malmö.²⁸¹
- ~ Consultancy agencies Cepro Management and The Concourse Group have merged and established an office in the Øresund region.
- ~ The German-Swedish Chamber of Commerce and Industry has opened an office in Malmö.²⁸²
- ~ The advertising agency SandbergTrygg has become established in Malmö and has acquired Henri Annonsbyrå.²⁸³
- ~ The advertising agency kommun.communications opened its Malmö office in June 2000.²⁸⁴
- ~ The communications agency Spider Relations has opened offices in both Malmö and Copenhagen.²⁸⁵
- ~ The communications agency Adera has become established in Malmö through its acquisition of Blanking AB.²⁸⁶
- ~ Expotours & Events, active within event marketing, has become established in Malmö.²⁸⁷

- ~ Ark Travel AB (business travel, group and conference) has become established in Malmö.²⁸⁸
- ~ Internet travel agent Travelprice has become established in Copenhagen with both a Swedish and a Danish website.²⁸⁹
- ~ The Norwegian call centre company Multipartner has located its Swedish head office in Malmö.²⁹⁰

WHOLESALE AND RETAIL TRADE

- ~ British Car Import is now located in Malmö.²⁹¹
- ~ IMI Nordgrens has become established in Malmö.²⁹²
- ~ Japan Photo is in Malmö.²⁹³
- ~ Orifarm has opened an office in Malmö.²⁹⁴
- ~ Price Off has become established in Malmö.²⁹⁵
- ~ Rusta has become established in the region.²⁹⁶
- ~ Seating Concept is newly-established in Malmö.²⁹⁷
- ~ Vitalas²⁹⁸
- ~ Örtmedicinska Institutet has become established in Malmö.²⁹⁹
- ~ Hööks Hästsport AB has opened its first Danish department store in Kolding on Jutland.³⁰⁰
- ~ The Swiss building company Bauhaus is investing in Scania and has already established department stores in Helsingborg, Malmö and Lödeköpinge.³⁰¹

BANKING AND FINANCE

- ~ The Finnish investment company Bio Fund has established an office in Copenhagen.³⁰²
- ~ Nordiska Fondkommission has opened a branch office in Malmö.³⁰³
- ~ Öhman Fondkommission has become established in Malmö.³⁰⁴
- ~ The risk capital company Start-up Factory has opened a Scanian branch at the Ideon research village in Lund.³⁰⁵

HOTELS AND PROPERTIES

- ~ The property company Dockan Exploatering AB is newly established in Malmö.³⁰⁶
- ~ The Norwegian hotel property company Home Invest has purchased the Swedish Hotell Temperance in Malmö.³⁰⁷

- ~ The hotel chains Hilton and Marriot are established in Copenhagen.³⁰⁸
- ~ The Dutch property and investment company Fortress Groups is making its first Scandinavian investment in Malmö.³⁰⁹
- ~ The British brokers Healey & Baker are establishing a Malmö office.³¹⁰
- ~ The Norwegian pension fund KLP Ejendomme A/S is established in Copenhagen through property acquisition – its first investment outside Norway.³¹¹
- ~ The property company Norrporten, with its head office in Sundsvall, has become established in Scania through acquisitions in Kristianstad and Helsingborg.³¹²

OTHERS

- ~ IKEA is moving most of its head office functions to Helsingborg.
- ~ The warehousing company Shurgard is using its Swedish office in Malmö as a base for expansion into Denmark.
- ~ The German company Alexander Binzel, that markets welding equipment, has moved its office and warehouse from Karlskrona to Malmö.³¹³
- ~ Celsius Metech A/S, which is part of the Saab group, has opened an office in Taastrup.³¹⁴
- ~ The optics company Optronic has opened its regional office for Öresund in Malmö.³¹⁵
- ~ The Japanese optics company Hoya Corporation plans to create a Nordic centre in Malmö through the acquisition of Optikslip in Malmö. The purpose is to supply the markets throughout the Nordic area and the Baltic with glass for spectacles.
- ~ The Landskrona company Top Nordic is moving its purchasing organisation and warehouse to Copenhagen.³¹⁶
- ~ The Swedish care company Capiro will be establishing a care home in northern Zealand through its Danish subsidiary Actica.³¹⁷
- ~ Portsystem 2000 AB has opened a new branch in Malmö.
- ~ The building materials company Lafarge Braas Scandinavia AB plans to build a roof tile factory in Trelleborg.³¹⁸

- ~ Nordic Growth Market, Sweden's second largest marketplace for shares has become established at Ideon, Lund.³¹⁹
- ~ The convenience foods company Villman och Co is now established in Vellinge.³²⁰
- ~ The graphics company Mediafront has established an office in Malmö.
- ~ The home service company Homemaid has opened a branch in Malmö.³²¹
- ~ Gardena has located its warehousing for the entire Nordic area in Malmö.³²²
- ~ Daimler Chrysler has moved its Swedish head office from Stockholm to Malmö and has amalgamated the Swedish and Danish organisations.
- ~ The German truck group Jungheinrich has moved from Stockholm to Scania.³²³
- ~ The French aluminium manufacturer Pechiney has established its Nordic Head office in Frederiksberg.
- ~ The Gillette Group.
- ~ L'Oreal has established its Nordic distribution centre in Copenhagen.³²⁴
- ~ The Irish/German sack manufacturer IPS/Storsack has located its Nordic sales office in Copenhagen.³²⁵
- ~ Toys manufacturer Mattel.
- ~ Finnish Amer, that sells sports goods, has built up a Danish-Swedish sales office in Malmö.³²⁶
- ~ Sveriges Trafikskolors Riksförbund has consolidated its activities in Gothenburg and Stockholm to Landskrona.³²⁷
- ~ Security company Compatec AB, with its head office in Ronneby, has now become established in Malmö.³²⁸
- ~ Berghs school of advertising returned to Malmö in the autumn of 2001.³²⁹
- ~ The incubator company Starthouse, with its head office in Karlskrona, has established an office in Malmö.³³⁰
- ~ The Gothenburg-based concrete manufacturer Färdig Betong is established in Scania through the acquisition of 50% of Essbetong.³³¹

Appendices

APPENDICE I:

Surveys of factors that determine a company's choice of location when setting up

The European Banking Federation lists the following parameters based on a survey among 10 000 investors:

1. Infrastructure
2. Cultural offerings
3. Housing
4. Labour force
5. Business climate
6. Assistance from the government and local authorities

OECD's survey among hi-tech companies in the USA gave the following factors as the most significant when choosing a region³³²:

1. Access to skilled human resources
2. Available labour force
3. Tax conditions
4. Access to universities and institutes
5. Cost of living
6. Transport status
7. Access to markets
8. Regional restrictions
9. Energy costs
10. Cultural and recreational offerings

By sending questionnaires to approximately 150 group headquarters and divisional head offices, the Invest in Sweden Agency has studied the factors that are of importance to their localisation of which the following parameters were considered the most important³³³:

1. Individual taxation level
2. Good transport facilities
3. Proximity to customers
4. Regulatory framework and economic policy
5. Corporation tax
6. Proximity to suppliers

Stockholm County Council studied 20 international companies in the Stockholm region and found the following factors to be the most important³³⁴:

1. Telecommunications
2. Business climate
3. Access to skilled human resources
4. Cost of living
5. Extent of the road network
6. Access to housing

The British company Healy & Baker publishes an annual study which shows, inter alia, factors that are important for establishing a company based on interviews with 500 company managers. The following factors were identified in 1999³³⁵:

1. Proximity to the market
2. Transport connections – regional and international
3. Quality of and access to telecommunications
4. Access to manpower and costs for the same
5. Business climate, i.e. taxes, subsidies, start-up support, etc.
6. Availability of premises
7. Language environment
8. Access within the town/city
9. Quality of life
10. Clean environment

APPENDICE 2:

Universities and institutes in the Øresund region

The following are included in Øresund university:

Lund University, including Campus Helsingborg

University of Copenhagen

Technical University of Denmark

Copenhagen Business School

The Royal Danish Veterinary and Agricultural

University

Swedish University of Agricultural Sciences/Alnarp

The Royal Danish School of Educational Studies

The Royal Danish School Of Pharmacy

Roskilde University

Malmö University

Royal School of Library and Information Science,

Denmark

Kristianstad University

There are further institutions that have university status in Scania and Zealand. The following lists some of them. There is also a large number of care and teacher training universities in the region.

Copenhagen Engineering College Teknikum

Denmark's Design College

The Graphic College in Copenhagen

The Royal Danish Academy of Fine Arts School of

Architecture

The Royal Danish Academy of Music

The Royal Danish Academy of Visual Arts

World Maritime University

Malmö Academy of Music

Malmö Theatre Academy

Malmö Art Academy

The Swedish Commercial Pilot's College, Ljungbyhed

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Øresund Chamber of Commerce was founded on the 1st November 1999 as a partial merger between the Chamber of Commerce and Industry of Southern Sweden and the Danish Chamber of Commerce.

The Chamber represents nearly 13 000 member companies in the southern part of Sweden and Denmark and has become the local spokesman for the business community in matters regarding the Øresund region.

It has also created a solid platform encouraging integration between companies.

The strategic focus of the Chamber is to create the best possible conditions for company growth and it achieves this by enhancing the competitive strength of the region, working directly with companies offering consultancy, training and match-making activities.



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