

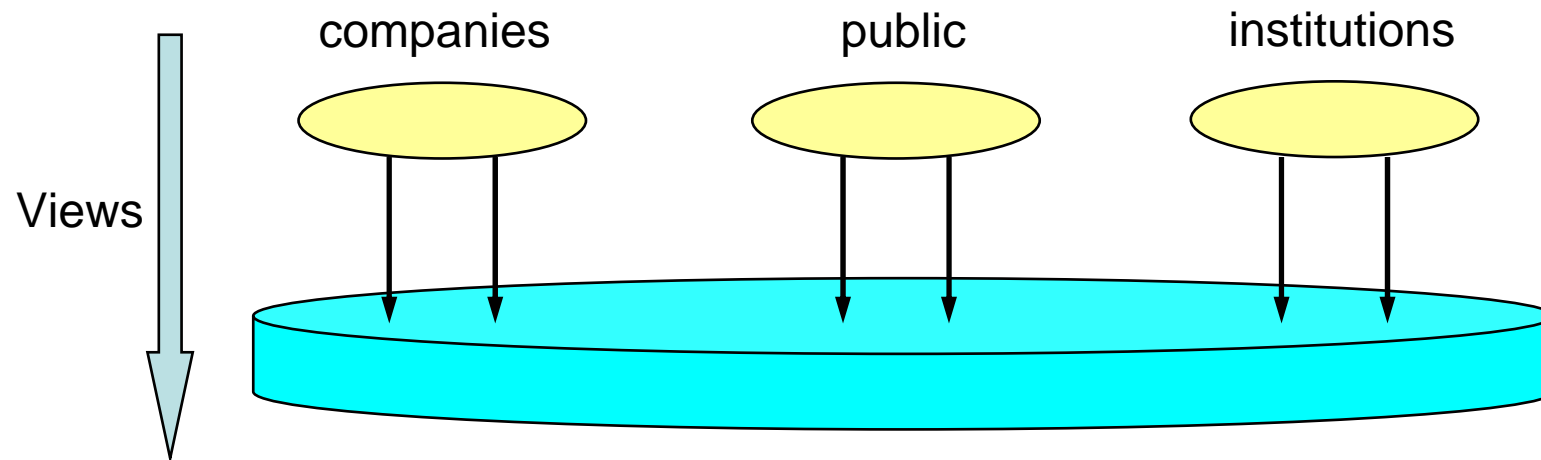
# Level of ICT usage and needs in the BSR

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*Wismar University*  
Hamburg, November 22nd 2007



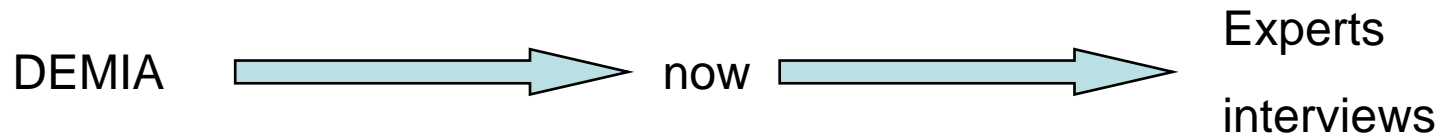
## DEMAND SIDE = VIEWS & VISIONS

The regional players are using the logistic & ICT services and infrastructure



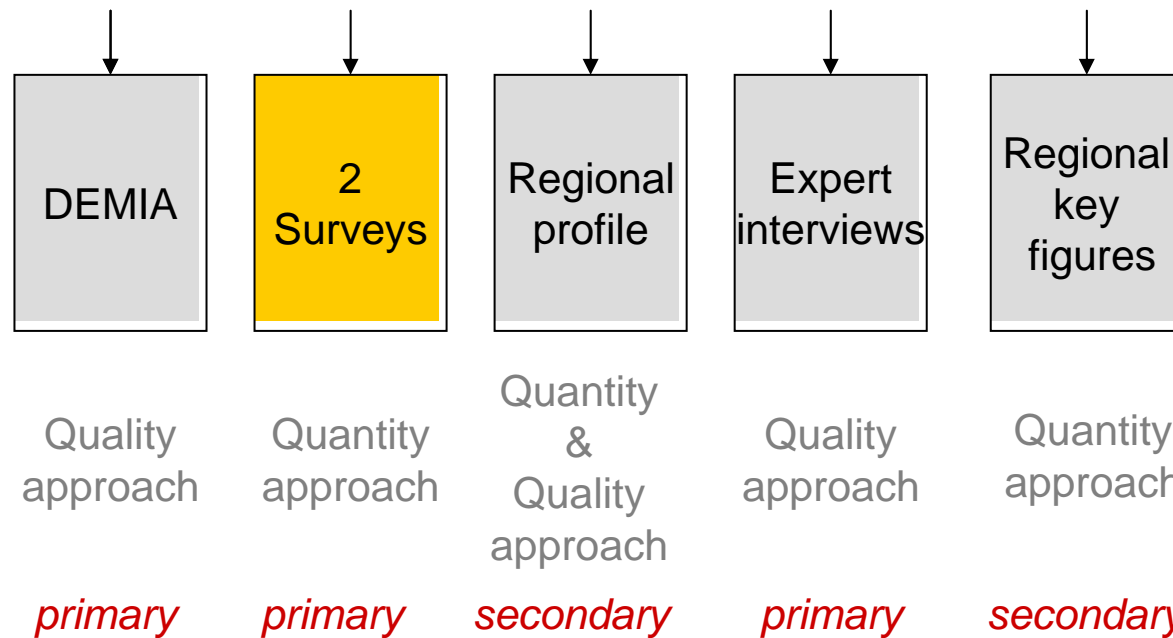
The region is offering Logistics & ICT services and infrastructure

## SUPPLY SIDE = ACTUAL SITUATION





## Activities



## The ICT Survey – objective, target group and characteristics

### Goal

- Within each region: describe the existing ICT infrastructure and services and contrast these results with the actual demands
- Within the BSR: compare the results among the different regions

### Target group

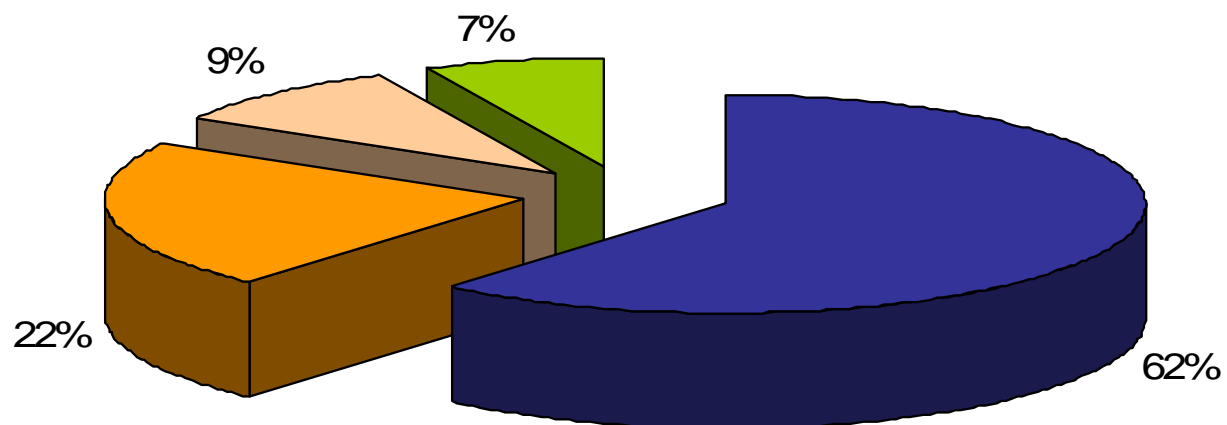
- whole population of companies in the region, with special focus on SME's

### Characteristics

- web-based survey
- the same survey in all of the regions (additional: e-mail, phone, interviews)
- translated into local languages
- no open questions → to make it comparable
- > 1,100 responses throughout the BSR



## Distribution of companies by size

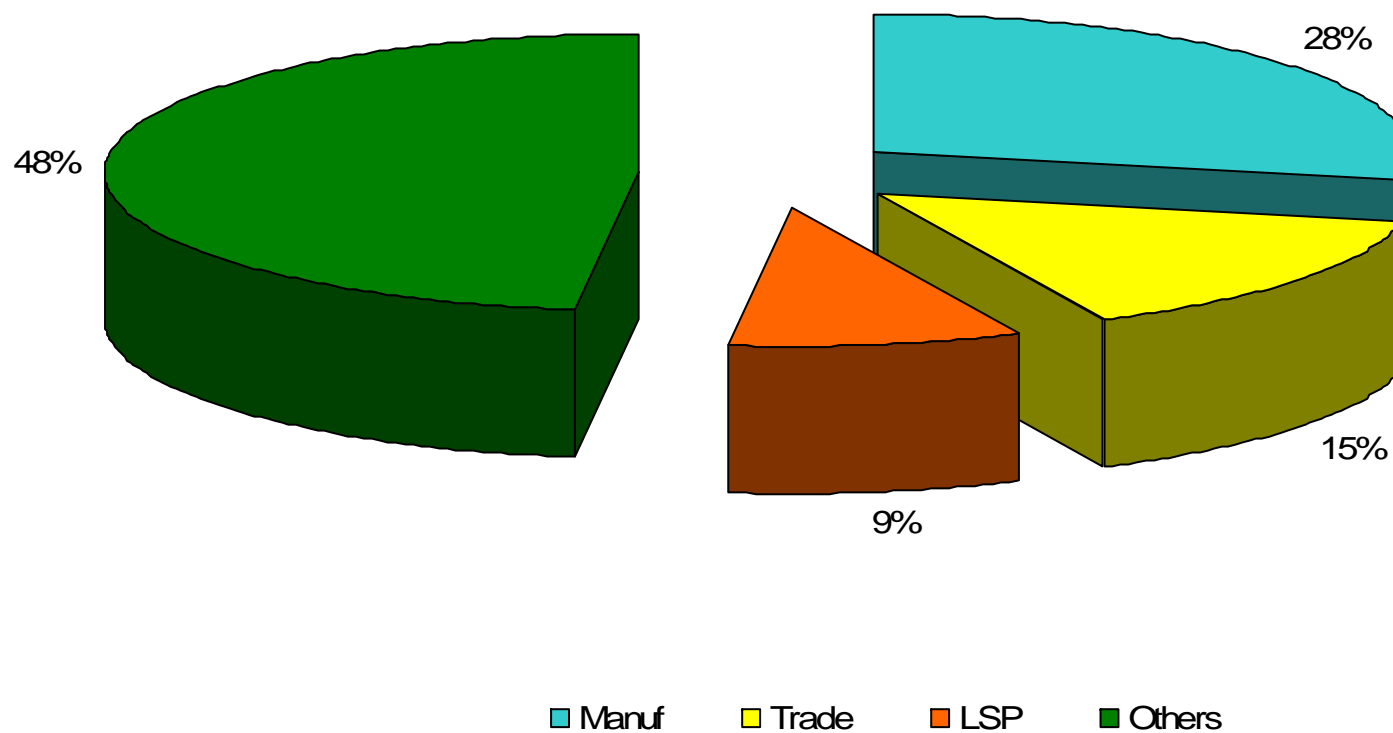


■ Micro ■ Small ■ Medium ■ Large



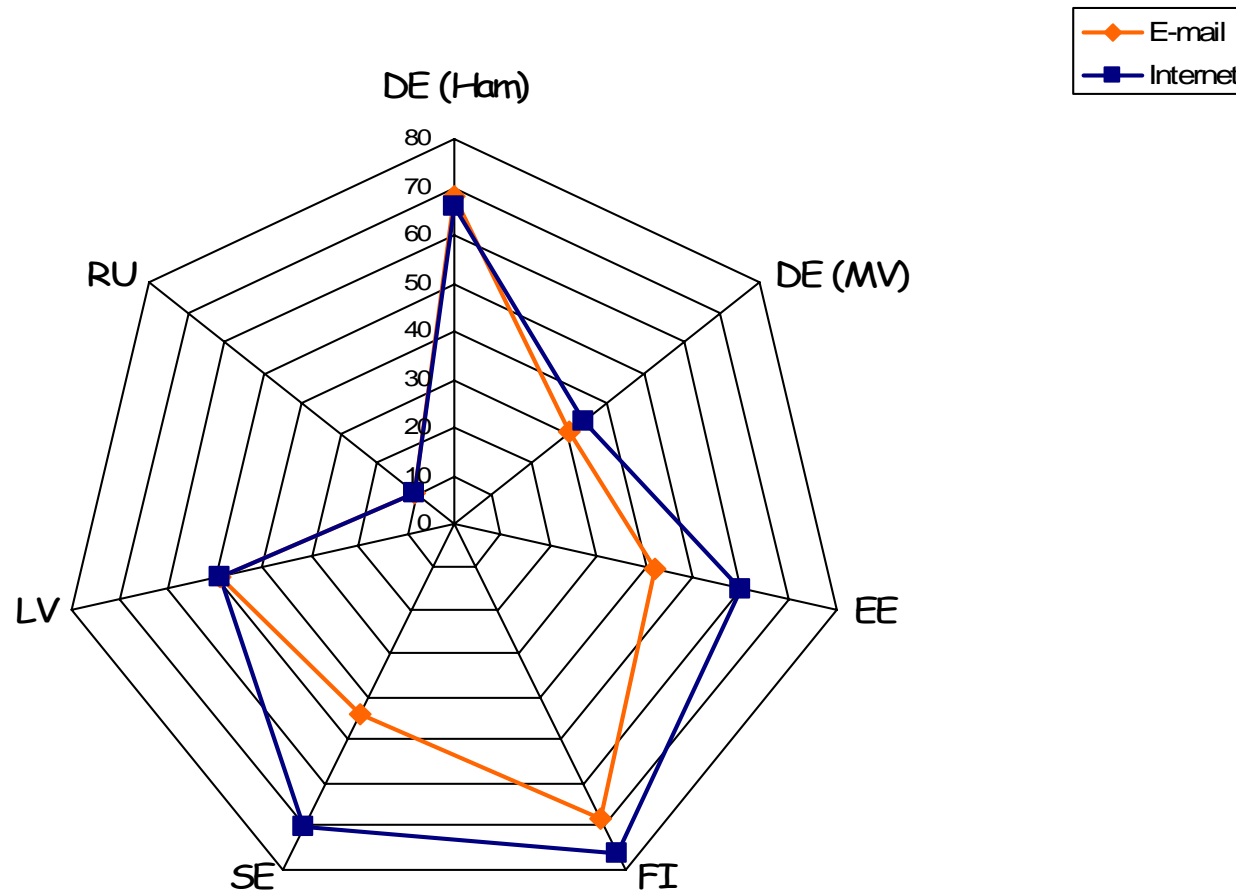


## Distribution of companies by industry





## Usage rates: e-mail & Internet (> 75%)





## Use of ICT in business areas

ICT is used in a different degree in various business areas. The two areas where ICT is implemented the most as a support of the daily activities are:

### Accountancy

- different software tools enabling quick and easy access to information
- indispensable for managing and monitoring tax information

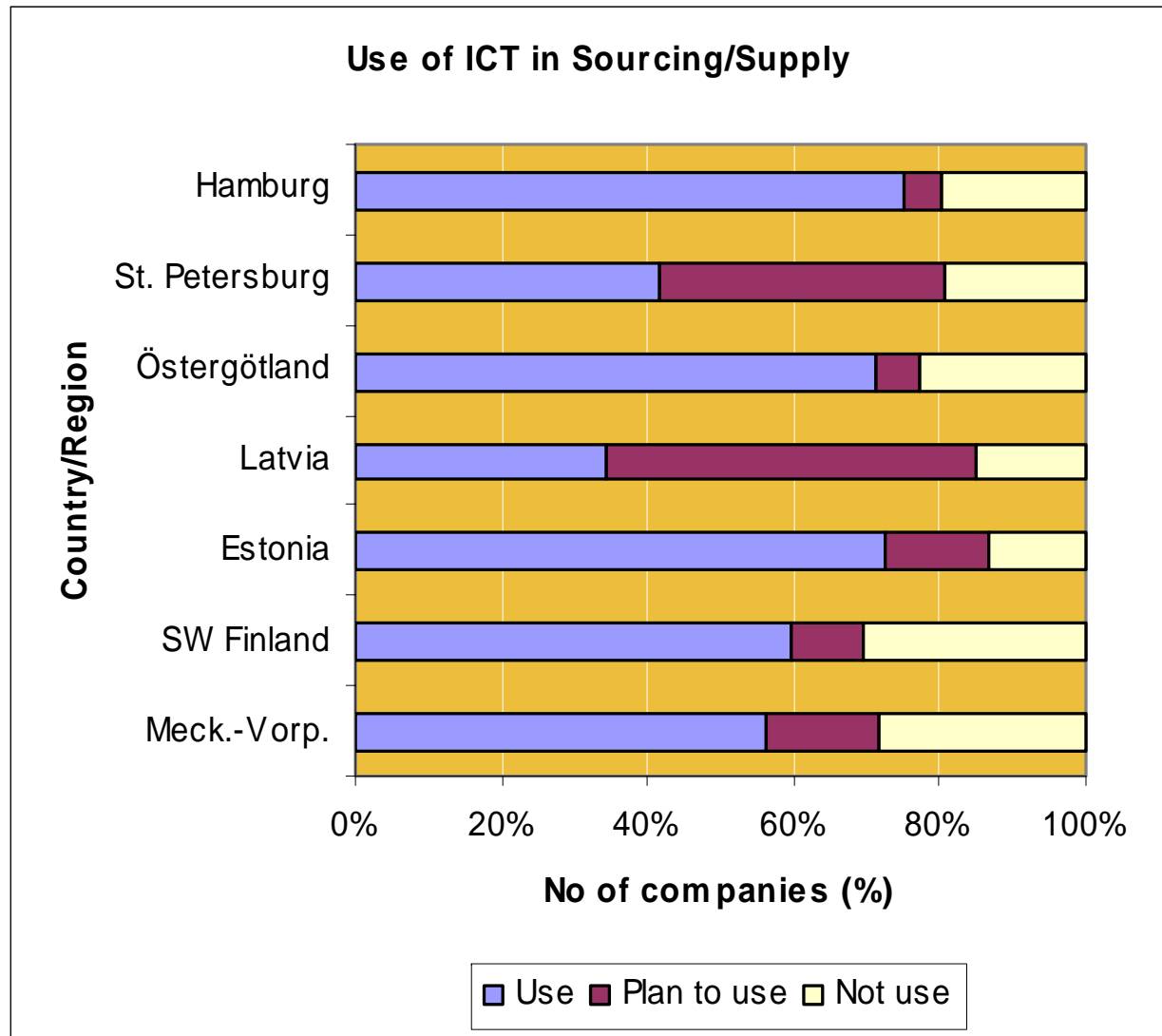
### Marketing & Sales

- improves presence of company worldwide
- unexpensive and with a wide coverage

### Sourcing & Supply-Chain-Management

- Regional differences in the BSR





## ICT expenses

- ❖ Similar distribution for the 3 types of expenses
  - ❖ Modal values for all types of expenses were  $< 2,5 \%$
- ❖ Software expenses are expected to increase the most
- ❖ Basic IT knowledge is nowadays common in the newer generations
  - big number of people can handle simple IT issues,  
but specialist are needed for more complex issues

## ICT expenses (hardware)

	0%	< 2,49%	2,5 – 4,9%	5 – 7,49%	7,5 – 10%	> 10%
Estonia	3	68	15	3	1	3
Hamburg	4	53	17	5	2	3
Meck.-Pom.	11	46	23	5	10	3
Russia	0	86	10	3	0	1
Sweden	3	74	11	1	1	1
Finland	9	57	15	7	5	5
Latvia	1	55	33	7	1	2

## ICT expenses (software)

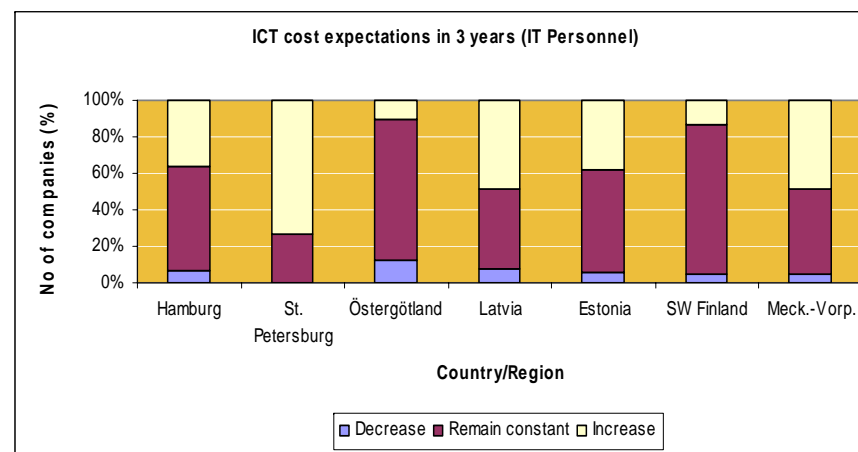
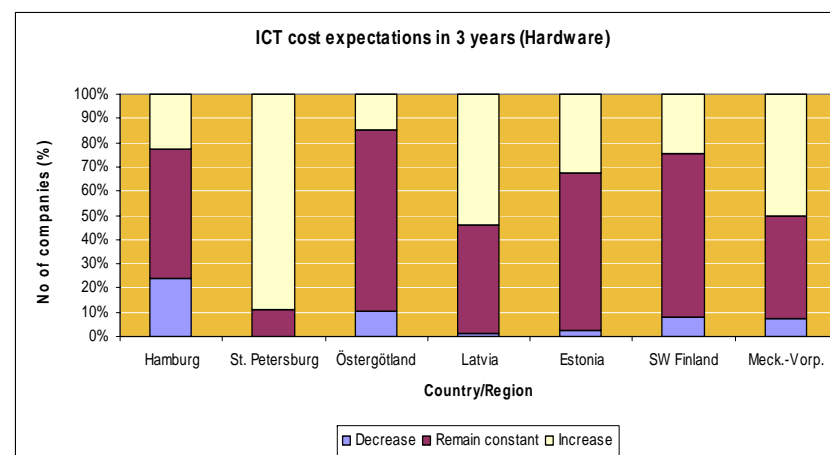
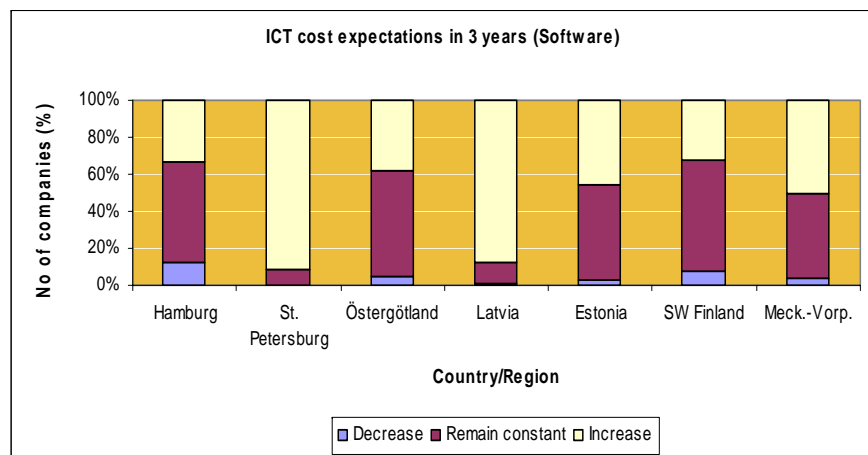
	0%	< 2,49%	2,5 – 4,9%	5 – 7,49%	7,5 – 10%	> 10%
Estonia	3	71	8	6	3	3
Hamburg	8	45	18	4	2	4
Meck.-Pom.	8	58	16	4	10	3
Russia	1	80	16	3	0	1
Sweden	1	69	15	3	4	1
Finland	15	52	13	6	4	5
Latvia	2	25	38	23	9	2

## ICT expenses (personnel)

	0%	< 2,49%	2,5 – 4,9%	5 – 7,49%	7,5 – 10%	> 10%
Estonia	23	44	6	2	1	4
Hamburg	13	38	15	4	1	5
Meck.-Pom.	25	32	17	3	11	8
Russia	8	80	6	2	0	3
Sweden	18	59	10	0	1	3
Finland	44	27	5	3	1	6
Latvia	22	58	13	3	1	2



## Development of ICT expenses in next 3 years



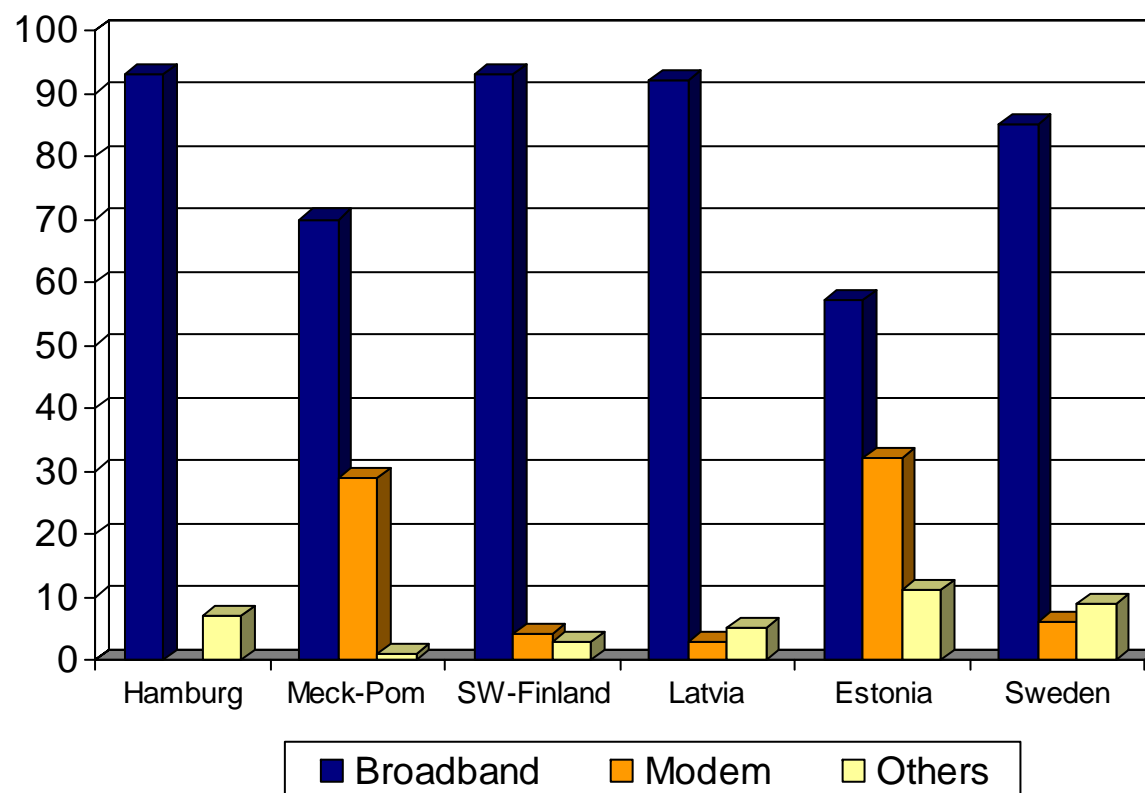


## Regional use of Internet & E-Commerce

- Internet access mainly via broadband connection  
coverage problems in rural areas ( Modem )
- high usage of company web sides
- But: still high importance of personal contacts
- High acceptance that e-commerce gives competitive advantage
- But: None of the surveyed companies handles more than 60 %  
of their business electronically.



## Types of Internet connection

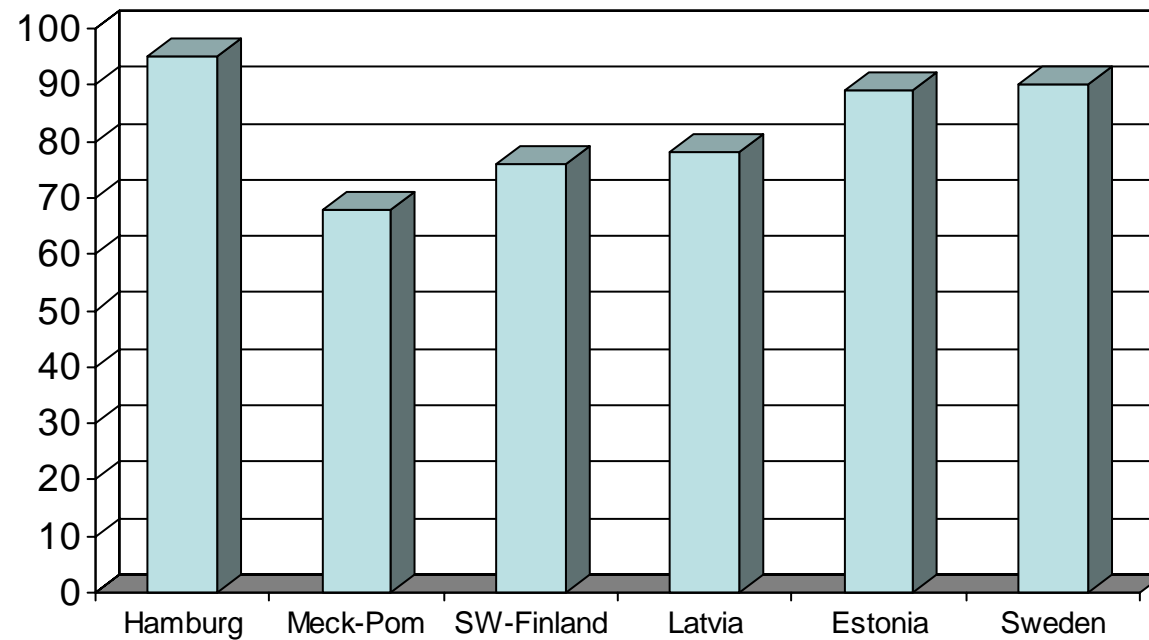




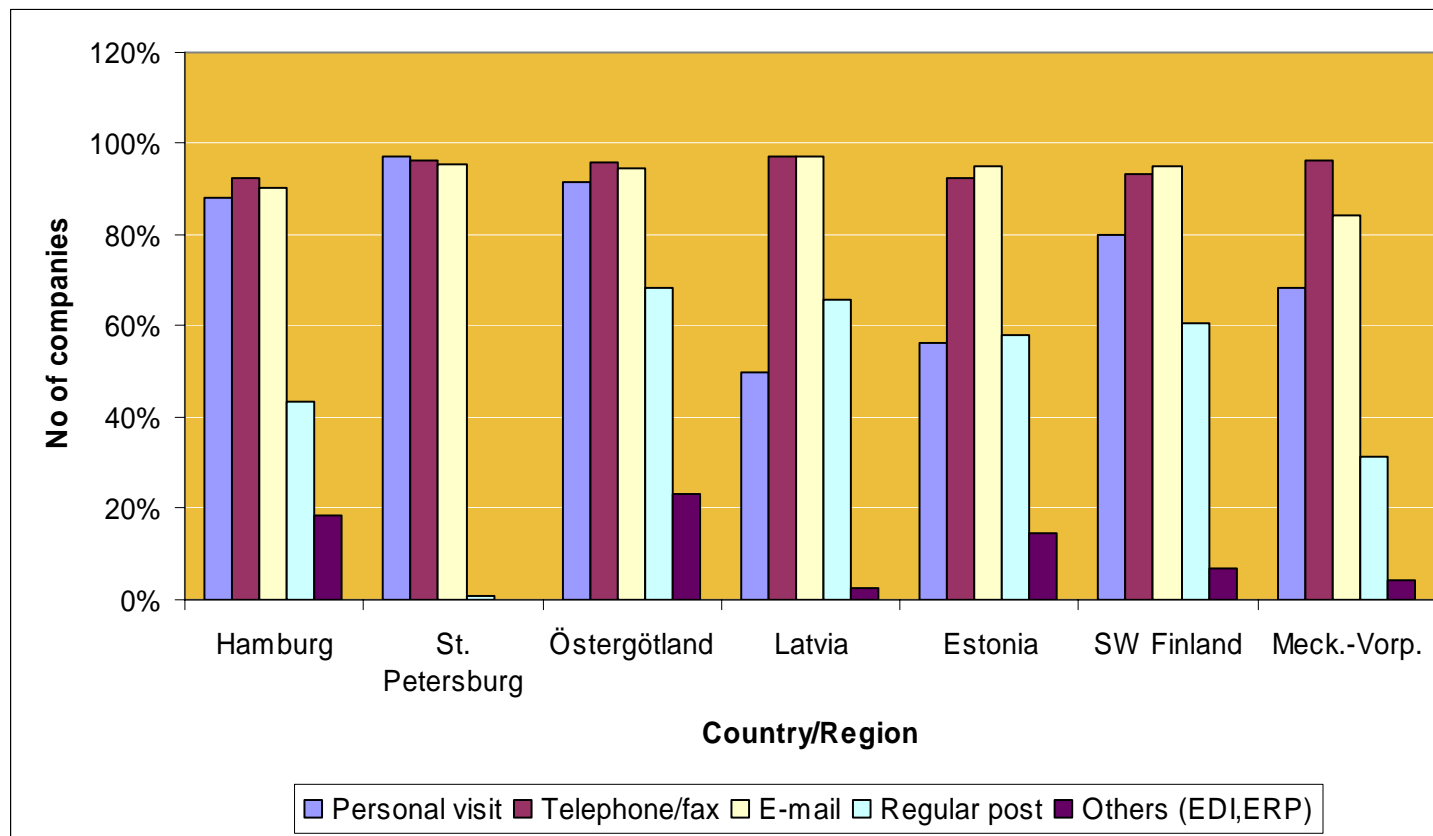


## Companies with website

### Websites

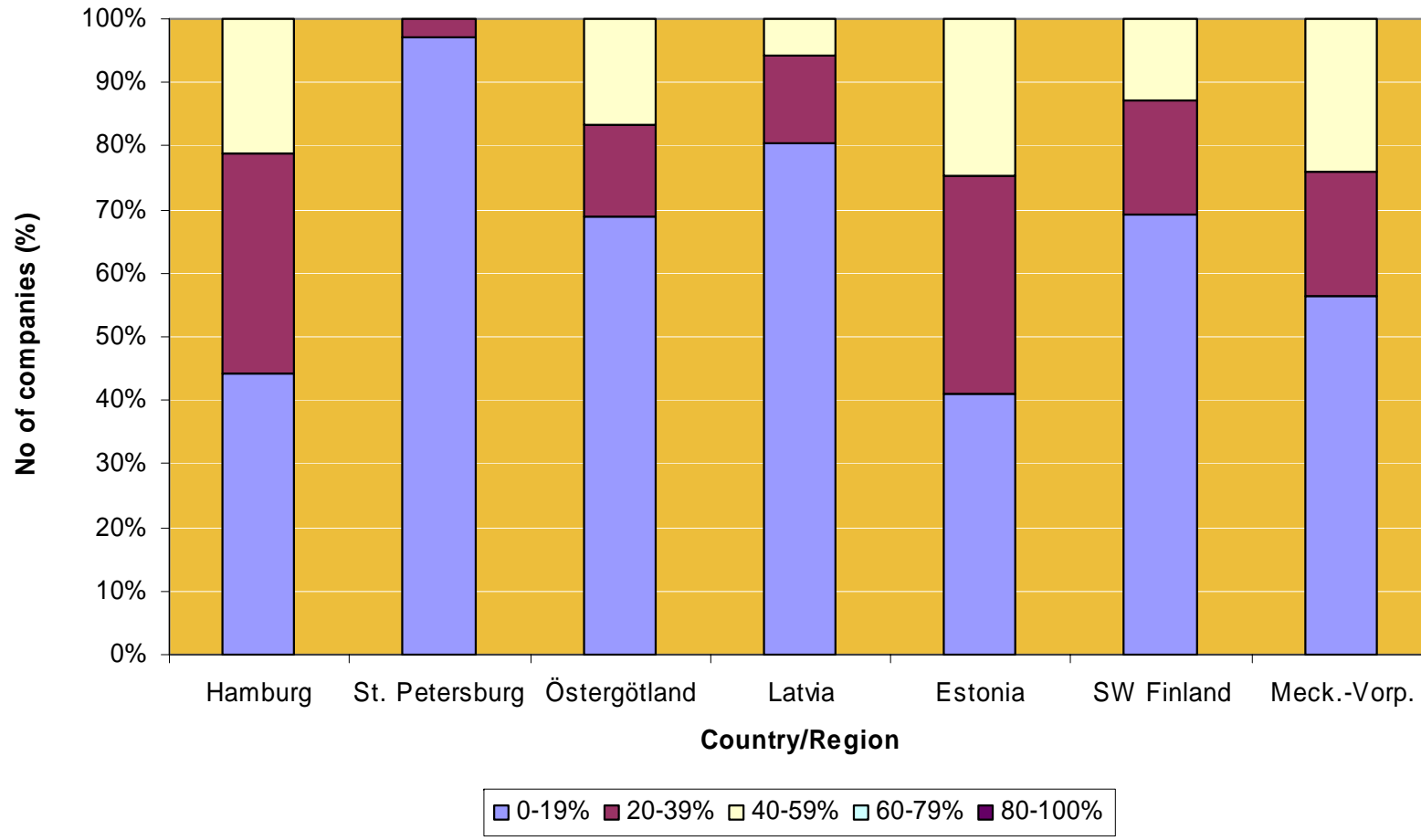


# Ways of communicating regularly with customers and suppliers





### Development of e-commerce with customers



## Use of Internet to interact with public authorities and government organisations

Internet is mostly used for:

- Obtaining general information (opening hours, contact persons, requirements for certain formalities, etc.)
- Downloading/requesting forms (tax return forms, regulations, licenses)
- Completing forms online
- Making online payments

## Conclusions

### **The survey revealed following concerns and needs:**

- Lack of qualified ICT personnel
- Weak development of e-commerce do to the low awareness of its increasing importance
- Concerns about security issues
- Shortage of e-Government services

# Specific Results for M-V

- Mecklenburg-Vorpommern is suffering of
  - weak industrial density
  - lack of skilled workers
  - migration to the West
  - Weakness in innovation
- General lack in language skill and intercultural experience of the companies
- Regional strength in highly developed infrastructure erected since the reunification in 1990 which nevertheless needs to be improved in the upcoming future.

# Logistics in MV

- Till 2007 no regional logistics strategy for MV
  - Spring 2007: Logistics Initiative Westmecklenburg
    - » Chamber of Commerce in Schwerin
  - October 2007: Logistics Initiative M-V
    - » Ministry for Transport, Building & Regional Development
- Underdeveloped cluster structures in the logistical sector
  - No regional coordinated offers in logistics services
- Underdeveloped educational sector in logistics
  - Logistics Master will be launched from Wismar University

# Special Outcomes of Expert Interviews in MV

- hugest part of the public money has been spent into the infrastructure since the German reunification
  - not sufficient for a sustainable development of the logistics sector
  - logistics competence inside the regional administration is important for development
  - More investments in regional soft factors
    - » development of a regional logistics strategy including usability concepts in logistics & networks
  - *Because: The need of concepts and related soft factors are more important as more underdeveloped the region*
- In service sectors the regional development is more depending from the governmental competence and the regional soft factors than from the infrastructural situation



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