

*LogOn Baltic Regional reports*  
*10:2007*



**REGIONAL DEVELOPMENT IN  
THE SOUTHERN METROPOLITAN  
REGION OF HAMBURG, GERMANY**  
**Development Measure Impact Analysis  
(DEMIA) on regional development  
related to logistics and ICT**

**Janina Benecke,  
Jürgen Glaser and  
Rupert Seuthe**



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## EXECUTIVE SUMMARY

The aim of the LogOn Baltic project is to develop and provide information about the efficiency in corporate logistics and logistical information systems. It was established to advance communication between companies, investors and public partners in the Baltic region. By means of an international comparison the importance of logistics, IT and planning shall be identified with regards to regional development. With the publication of the analysis in regional development in South West Finland, the LogOn Baltic project has started an important task to describe one of the regional development systems of the Baltic Sea Region. The goal is to establish reports on regional development for all the partner regions in this project.

According to this goal, the Wachstumsinitiative Süderelbe AG, as subcontracted partner of Hamburg School of Logistics (HSL) in the LogOn Baltic project, has prepared a development measures impact analysis with the aim to describe and to picture the current situation concerning regional development and existing development programmes in the Hamburg metropolitan region in general and its southern area in particular.

In Germany, the federalist structure of the state has an essential influence on the system of spatial planning. Germany is a decentralised state in which spatial planning is arranged through the legally determined distribution of responsibilities and tasks between the three levels of the Federation, the federal states and the municipalities. Accordingly, the eight counties which form the Southern Metropolitan Region of Hamburg (the Counties Harburg, Stade and Lüneburg among them) all have far reaching political and administrative power related to planning affairs within their territory and liability. One of their main tasks is to prepare strategies for spatial development on the state's level. At the same time, the counties' administration is obliged to prepare a state development plan that represents the strategy for the spatial development within the County borders.

With regard to Hamburg as a logistics location, the Logistics Initiative Hamburg (established in 2006) has recently conducted a SWOT analysis. The results clearly unveil that Hamburg's strengths as a logistics location for example lie in the variety of active logistics

companies and services available. Furthermore, the logistics business is strongly supported by Hamburg's government, the Senate. Nevertheless, Hamburg's rather weak points are the infrastructure, the port's hinterland connections and, above all, the poor availability of sites for commercial and industrial use within the city borders. Offers are rare, high costs of real estate are typical of the city's situation. In order to overcome these weaknesses a strong cooperation with the neighbouring regions is required so that the Hamburg Metropolitan region will remain a competitive logistics location in the future.

In contrast to the DEMIA of South West Finland this analysis shows that companies based in the Hamburg metropolitan region are not only relatively well aware of the presence and the efforts of institutions which support and foster regional development. They even get increasingly involved in such institutions like the Logistics Initiative Hamburg and the Wachstumsinitiative Süderelbe AG, as members or share holders and with the view to playing an active role in the development process and to benefiting from the implementation of concrete logistics, ICT or else projects: Currently, more than 230 companies not only from the Logistics sector are actively involved in the network of the Logistics Initiative. The Süderelbe AG, which is affiliated to the Logistics Initiative Hamburg, already counts more than 80 share holders which comprise logistics firms among others.

Through the Süderelbe AG with its modern PPP structure, regional development and the development of companies have gained a particularly close connection in the southern metropolitan region of Hamburg. The Süderelbe AG thereby represents a new type of a regional development agency that follows the ruling principle of a close project oriented cooperation of companies, authorities, universities and others within a stable network in order to strengthen strengths in the region and thus making the Metropolitan Region of Hamburg an even more successful (logistics and ICT) location in the future.

This report was compiled by Janina Benecke, Dr. Jürgen Glaser and Dr. Rupert Seuthe from the Süderelbe AG.

## EXECUTIVE SUMMARY

Das Ziel des LogOn Baltic Projekts ist die Generierung und Bereitstellung von Informationen über die Effizienz von gemeinsamen Logistikauftritten sowie logistischen Informationssystemen. Das Projekt wurde eingerichtet, um die Kommunikation zwischen Unternehmen, Investoren und öffentlichen Partnern im Ostseeraum zu verbessern. Anhand eines internationalen Vergleichs soll die Bedeutung von Logistik, IT und Planung mit Bezug auf regionale Entwicklung ermittelt werden. Mit der Veröffentlichung der Analyse über die regionale Entwicklung im Südwesten von Finnland hat das LogOn Baltic Projekt einen wesentlichen Anstoß gegeben, um eines der regionalen Entwicklungssysteme im Ostseeraum zu beschreiben. Das Ziel ist es, Berichte dieser Art für alle an diesem Projekt beteiligten Partnerregionen zu erstellen.

Diesem Ziel folgend hat die Wachstumsinitiative Süderelbe AG als untergeordneter Partner der Hamburg School of Logistics (HSL) in dem LogOn Baltic Projekt eine Analyse der Effekte von Regionalentwicklungsmaßnahmen erstellt. Die Analyse soll die aktuelle Situation in Bezug auf die regionale Entwicklung, Ihre wichtigsten Trägerinstitutionen und die wesentlichen bereits in Umsetzung befindlichen Maßnahmen, Programme und Initiativen in der Metropolregion Hamburg im Allgemeinen und der südlichen Metropolregion im Besonderen darstellen.

In Deutschland hat die föderalistische Struktur des Bundesstaates einen wesentlichen Einfluss auf das System der Raumplanung. Deutschland ist ein dezentralisierter Staat. Raumplanung ist mithilfe der gesetzlich festgelegten Aufteilung von Verantwortung und Aufgaben zwischen den Ebenen Bund, Bundesländer und Kreise geregelt.

Die südliche Metropolregion Hamburg setzt sich aus insgesamt acht Landkreisen zusammen, darunter die Landkreise Harburg, Stade Lüneburg. Diese Landkreise haben politische und administrative Befugnisse, mit der sie wesentliche raumplanerische Angelegenheiten in ihrem Bereich regeln können. Die Hauptaufgabe der Landkreise ist es, Strategien für Raumplanung und -entwicklung auf Landesebene vorzubereiten. Die Verwaltung des Landkreises ist gleichwohl

verpflichtet, einen Entwicklungsplan auf regionaler Ebene zu erstellen, der die Vorgehensweise für die Raumplanung präsentiert.

Welche Vorzüge Hamburg als Logistikstandort besitzt, hat die Logistikinitiative Hamburg jüngst in einer Befragung herausgefunden. Die Ergebnisse der Stärken- Schwächen- Analyse des Standorts haben recht deutlich gezeigt, dass Hamburgs Stärke z.B. in der Vielzahl von Logistikunternehmen und der Bandbreite von verfügbaren Dienstleistungen besteht. Außerdem wird der Logistiksektor als ein ökonomischer Schwerpunktbereich Hamburgs bevorzugt durch den Senat gefördert. Trotzdem hat auch der Logistikstandort Hamburg seine Schwächen, und die zeigen sich eindeutig in der Infrastruktur, in der noch verbesserungswürdigen Hafenhinterlandanbindung des Hafens und in der geringen Verfügbarkeit sowie den hohen Kosten von gewerblichen Flächen im Hamburger Stadtgebiet. Um diese Schwächen zu beheben, ist eine gute und enge Zusammenarbeit Hamburgs mit den benachbarten Regionen gefordert, damit die Metropolregion auch in der Zukunft ein wettbewerbsfähiges Logistikzentrum bleibt.

Im Gegensatz zu der DEMIA über den Südwesten von Finnland zeigt die vorliegende Analyse, dass in der Metropolregion Hamburg angesiedelte Unternehmen über die Institutionen, die die Stärken und die Entwicklung der Region unterstützen und fördern, nicht nur relativ gut informiert sind. Eine wachsende Zahl von Unternehmen engagiert sich darüber hinaus direkt in solchen regionalen Entwicklungseinrichtungen wie der Logistik Initiative Hamburg und der Wachstumsinitiative Süderelbe AG: als Mitglieder bzw. Aktionäre und mit dem Ziel, aktiv an regionalen Entwicklungsprozessen teilzuhaben und von der Umsetzung konkreter Projekte in den Bereichen Logistik, IuK oder anderen zu profitieren. Das Netzwerk der Logistik Initiative Hamburg umfasst aktuell 230 Mitglieder, nicht nur aus der Logistikwirtschaft. Die Süderelbe AG, die mit der Logistik Initiative Hamburg verbunden ist, zählt derzeit mehr als 80 Aktionäre, darunter auch Logistikunternehmen.

Durch die Süderelbe AG mit ihrer modernen PPP Struktur sind Regionalentwicklung und Unternehmensentwicklung in der südlichen Metropolregion Hamburg besonders eng miteinander verknüpft. Die Süderelbe AG repräsentiert dabei einen neuen Typus von Regionalentwicklungsgesellschaft unter dem Leitprinzip der engen, Projekt orientierten Zusammenarbeit von Unternehmen, Behörden, Hochschulen und anderen regionalen Akteuren im Rahmen eines stabilen Netzwerks mit dem Ziel, die vorhandenen Stärken der



südlichen Metropolregion zu stärken und so die Metropolregion Hamburg künftig zu einem noch erfolgreicherem (Logistik- und IuK-) Zentrum zu machen.

Diese Arbeit wurde zusammengestellt von Janina Benecke, Dr. Jürgen Glaser and Dr. Rupert Seuthe von der Wachstumsinitiative Süderelbe AG.



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# 1 INTRODUCTION

## 1.1 Project introduction – LogOn Baltic

The LogOn Baltic project was approved within the Baltic Sea Region (BSR) INTERREG III B Neighbourhood Programme, which is sponsored by the European Regional Development Fund (ERDF), as part of the Structural Funds, and co-financed by national project partners.

The purpose of LogOn Baltic is to present solutions to improve the interplay between logistics and Information and Communication Technologies (ICT) competence and spatial planning and strengthening Small and Medium-sized Enterprises (SMEs) competitiveness in the BSR. This is primarily done by the production and dissemination of information for regional development agencies on how to support enterprises in the participating regions in the field of ICT and logistics, thus improving regional development.

The following regions are participating in the project:

- South-West Finland
- Östergötland (Sweden)
- Denmark
- Southern Metropolitan Region of Hamburg (Germany)
- West-Mecklenburg (Germany)
- North-East Poland
- Lithuania
- Latvia
- Estonia
- St. Petersburg (Russia)

LogOn Baltic provides an overview of logistics efficiency and logistics information systems and their exploitation, in order to improve the interaction between SMEs and other public/private actors.

On the one hand, the empirical activities of LogOn Baltic compare the existing logistics services and infrastructure with the logistics needs in the participating regions, making it possible to develop perspectives and action plans for strengthening the logistics competence in the

regions. On the other hand it describes the existing ICT infrastructure and services, revealing up to what extent they meet with the companies' needs for further development. In this way, LogOn Baltic focuses on:

- a. identifying development agencies and evaluating their performance in each region
- b. evaluating the level of logistics and ICT efficiency
- c. suggesting concrete actions for regional and local public sector bodies

Data are gathered in each participating region using four tools: Development Measure Impact Analysis (DEMIA), Logistics survey, ICT survey and Expert Interviews; each of these is presented in a separate report. These results together with secondary data is presented in a regional report, that will describe the state of affairs in the region, with recommendations on what and how the region needs to develop. The regional reports are used as a basis for making an interregional comparison which is reported in an inter-regional report. All reports are available on the project homepage, [www.logonbaltic.info](http://www.logonbaltic.info).

## 1.2 Regional partner introduction

### 1.2.1 The Hamburg School of Logistics

HSL Hamburg School of Logistics is a byword for excellent further education in logistics. The HSL course offering includes a full-time MBA programme and a part-time MBA programme specialising in logistics management. HSL also offers in-service continuing education sequences in the form of day forums, seminars and, uniquely in Germany, a summer school.

The Hamburg School of Logistics (HSL) was founded in July 2003 in Germany as an innovative public-private partnership between the Hamburg University of Technology (TUHH) and the Kuehne Foundation of Schindellegi, Switzerland. The HSL vision is to become a top business and logistics school and a leading international competence centre for applied research in logistics. The HSL is taking shape on the TUHH campus as an international university in Germany for logistics with a powerful, tried and tested network of academics and corporate backers at its disposal.



The HSL is Hamburg's answer to the deficit in management development in the field of logistics. Most of the executives who are currently at the controls of worldwide logistics systems have had to get used to the wide-ranging areas of their work as self-taught specialists because not enough courses are on offer. In spite of the numerous training and further training offerings in the logistics sector that have since been laid on, there continues to be a shortfall, especially for highly-qualified trainee managers and senior executives in both retail, industry and the services sector.

The challenging programmes offered by the HSL cover important concerns that logistics and management fields are facing to respond the high demand on competitiveness among business. With its compact MBA in logistics program, HSL would like to attract young next generation executives in preparation for top management positions in the field of logistics. The professional programme is designed to offer executive learning and practical short courses providing further education to professionals, entrepreneurs, executives and practitioners who are immersed in logistics areas. Thus HSL deals with education and research such as: Business strategy, supply chain management, transportation and e-commerce, international logistics, leadership and project management.

### 1.2.2 The Wachstumsinitiative Süderelbe AG

The Wachstumsinitiative Süderelbe AG (abbreviation SAG) came into being in December 2004 against the background of an increased need for regional cooperation between Hamburg and its surrounding region in regard to the growing international metropolis competition. Representing a new type of a regional development agency, the SAG cooperates with its partners in the form of a "private-public partnership" (PPP) in which the participation of the business sector is of foremost importance.

With its cluster-oriented strategy the SAG aims to achieve sustainable economic growth in the southern Hamburg metropolitan region by forming networks and accomplishing project-oriented cooperation between regional companies, service providers, scientific institutions and authorities, thereby crossing borderlines of municipalities, districts and federal states. For this innovative approach to action, the SAG was awarded the national "kommKoop Award" by

the Federal Ministry of Transport, Building and Urban Development in 2006.

The Wachstumsinitiative was given the legal structure of a joint-stock company (“AG”). Within just two years of existence, the SAG has already gained 80 shareholders predominantly from the regional private business sector. Other shareholders are banks and savings banks and, to a small extent, regional authorities. This shareholder structure ensures that the main regional interests are incorporated. At the same time it represents a particular form of a PPP, namely a “private-public partnership” in which emphasis is on the involvement of and the cooperation with the private business sector. This priority is also reflected by one of the company’s main principles, i.e. to work in a business-oriented, entrepreneurial and financially promising manner.

According to its motto “Strengthening business”, the Wachstumsinitiative Süderelbe AG is committed to bringing about economic growth, added value and to fostering employment for the good of a sustainable regional development and an improved competitiveness of the Süderelbe region. These objectives shall be accomplished on the basis of a cluster-oriented strategy which focuses on four main fields of action, all representing existing regional strengths to be developed further. In addition to the clusters, there are three so called cross-sections of action which apply to all clusters:

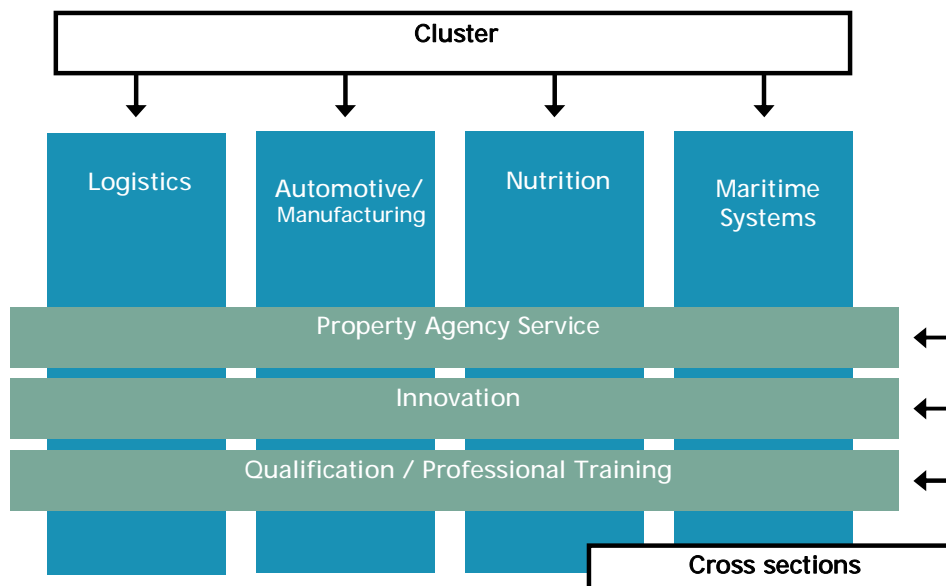


Figure 1 The Cluster Management of the Wachstumsinitiative Süderelbe AG

### 1.3 DEMIA Introduction

One of the goals in the LogOn Baltic project is to describe the regional development system in the Baltic Sea Region (BSR). To reach this goal, a separate study called Development Measures Impact Analysis (DEMIA) will be carried out in all the partner regions in the project.

The main focus in this study is to describe the system, roles and practices of regional development in each region. The aim is to produce information to the regional development bodies in the Hamburg metropolitan area and BSR –wide. The selected case-studies in each region are summarised and analysed briefly. The main focus of this assessment is on learning; the usefulness of the measures is not under inspection here but rather their improvement and knowledge sharing potential.

The main focus in this study is on business and development of enterprises. Not on spatial planning as such but only when connected to companies. This means looking at development agencies and measures from this point of view. Furthermore the focus is on logistics and ICT. Information and communications technology (ICT) is studied only when connected to enterprises and preferably their logistics. The development actors will be listed but in the measures only the logistics and ICT-related measures are studied more carefully.

The regional development practices and circumstances in the BSR vary. Nonetheless, there will be a comparative study prepared on the findings of the other equivalent studies on regional development within LogOn Baltic providing useful information to the policy makers and regional development actors alike.

### 1.4 Region specific introduction

#### 1.4.1 The Hamburg metropolitan region

Due to globalisation, frontiers need to be overcome. That is why Hamburg and its neighbouring local government authorities decided to improve their standing in the global competition by presenting themselves as a united, supra-regional northern European metropolitan region.

The Hamburg metropolitan region covers neighbouring areas of the states (Bundesländer) of Schleswig-Holstein and Niedersachsen. This economically eminent region comprises the industrial area of Brunsbüttel as well as the counties Cuxhaven, Harburg, Herzogtum Lauenburg, Lüchow-Dannenberg, Lüneburg, Pinneberg, Rotenburg (Wümme), Segeberg, Soltau-Fallingb., Stade, Steinburg, Stormarn and Uelzen. These counties are among the most prosperous and rapidly growing ones in Germany.

As an economic centre, Hamburg is closely linked to its surrounding region. Each working day, some 300,000 people from the outlying districts commute to Hamburg.

With a surface of over 18,000 square km, the Hamburg metropolitan region is home to some four million people, making it a powerful economic force. Since 1999 the population has grown by 35,000 to 1.74 million residents in Hamburg. The population of the metropolitan region has climbed by 71,000 since 2000 to 4.246 million. The growth in city and region is definitely above average. According to a survey from Cologne University, up to 2040 the population of Hamburg will exceed 2 million; the population of the metropolitan region will reach 4.412 million.

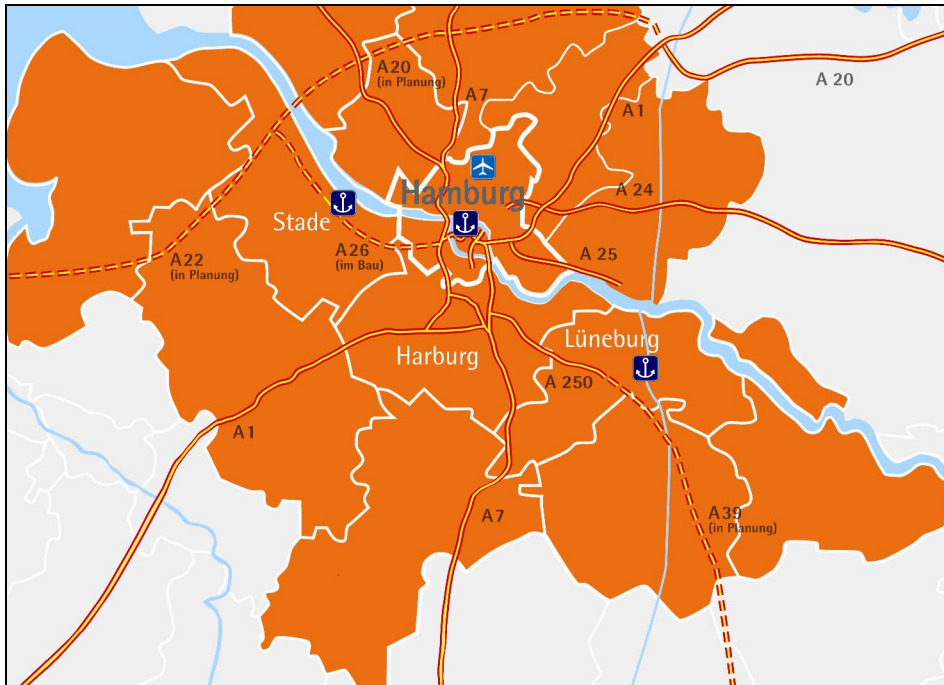


Figure 2 The metropolitan region of Hamburg

The Hamburg metropolitan region is known as the German centre for foreign trade. Many international companies, among them a significant and steadily growing number of Chinese companies, are represented in Greater Hamburg as it is one of the most dynamic economic regions in Europe having an attractive market with high purchasing power. Hamburg's contribution to GDP is over 50% higher than the German average in terms of gainfully employed persons and nearly 90% higher per capita. Roughly 10% of Germany's top 500 companies are from Hamburg. With more than 32,000 trading companies and over 125,000 employees Hamburg is Germany's largest trade city. Trade and logistics are very important segments where 40,000 companies provide 200,000 jobs. The crucial factor and guarantor of this prosperity is the port of Hamburg.

#### 1.4.2 The Port of Hamburg and its importance for the Hamburg metropolitan region

The metropolitan region of Hamburg with its over four million inhabitants is one of the regions to have gained most from the fall of the Iron Curtain and from globalisation. The metropolis by the water is the North Sea's easternmost port and simultaneously the ideal port for Eastern Europe. As a traditional global hub for overseas, central and eastern Europe as well as the entire Baltic Sea region, the Hamburg metropolitan region benefits from its central position at the heart of Europe's logistical commodity flows. 75% of all time charter contracts for container ships worldwide are handled in Hamburg. 24% of global container ship capacity is managed by shipping companies in the Hamburg area.



Figure 3 Hamburg's position in the centre of Europe

Hamburg is Europe's second largest container port and ranks eighth place world-wide. Since the beginning of the millennium, Hamburg has gained double figure growth rates for container handling. In 2006, a new record level of container turnover was reached: 8.9 million TEU.

Hamburg nowadays is the most important port for the Far East and China's gateway to Europe. The Middle Kingdom is Hamburg port's most important trading partner - and the growth rates are above average. Trade with Asia made up one half of the entire container handling volume of 8.1million TEU in 2005. With approximately 400 Chinese companies based in the city, Hamburg is one of the leading Chinese locations in Europe.

Thanks to the vibrant international port and the unique position between two seas, the Hamburg metropolitan region provides the best prerequisites for logisticians. All the well-known logistics services companies are represented. The global players of the logistics world are packed into the region to manage the massive flows of trade from all continents. A dense network of logistics companies and experts ensures a suitable partner for all requirements. The range of IT and technology specialists in the metropolis is unique. The metropolitan region also offers a wide range of educational programmes to ensure that logistics companies in Hamburg can count on a pool of well-qualified specialist personnel.

Today, around 156,000 jobs depend directly or indirectly on the port (2004) - an increase of 11,000 since 2001. According to the Regionomica survey (2005), there will be 14,000 additional logistics jobs in the Hamburg metropolitan region by 2015.

Hamburg's port is known as efficient thanks to the region's infrastructure and the ideal connection of the surrounding region to the European transport system. The existing regional infrastructure provides an excellent basis for all means of transportation to distribute goods throughout Europe: the port is perfectly integrated into a high performance transport network.

Additionally, the neighbouring or associated ports fulfil a function as a hub within the transport chain on behalf of these. Thanks to the reunification of Germany, the Port of Hamburg has regained its natural hinterland along the Upper Elbe that can now be reached by inexpensive transport on inland barges.

Thanks to its efficient network of motorways, the Hamburg metropolitan region has the highest growth rates for freight transport in all of Germany. Numerous feeder ships and barges using the North and Baltic Sea, the Elbe river and large canals complete Hamburg's

connections to the hinterland and the states bordering on the Baltic Sea.

### 1.4.3 The Süderelbe region in particular

The Süderelbe region is the core part of the southern Hamburg Metropolitan Region. It is named after the eponymous branch of river Elbe and forms the immediate hinterland of the Port of Hamburg area.

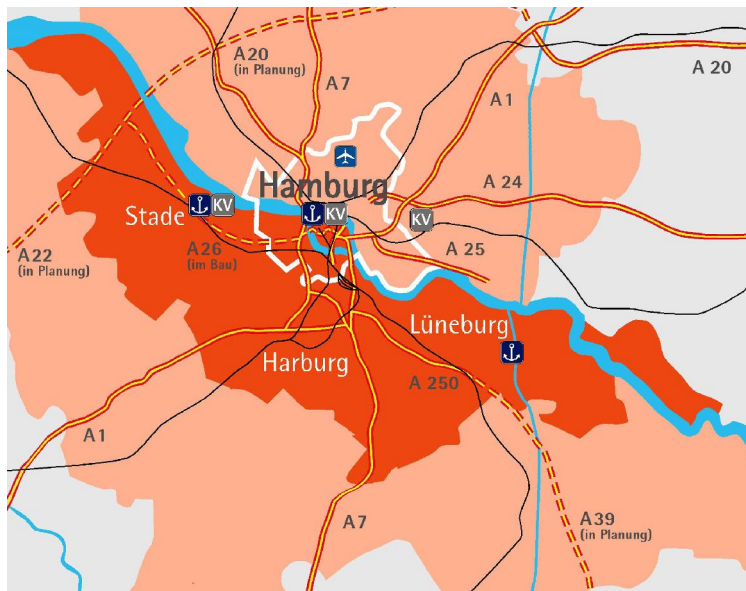


Figure 4 The Southern Metropolitan Region of Hamburg

The region is made up of Hamburg's urban district Harburg, where both regional partners of the LogOn Baltic project are based, and the three counties Stade, Harburg and Lüneburg, all located in northern Niedersachsen. Thus, it comprises parts of two states (Bundesländer): Hamburg and Niedersachsen. It is not an administrative entity itself, but a cross-border economic region of increasing importance for the Hamburg metropolis.

Stretching out on 4000 km<sup>2</sup> along the river Elbe, the Süderelbe region offers many advantages for business activities: 800.000 inhabitants in the Süderelbe region and some 4 million in the Hamburg metropolitan region as a whole ensure strong purchasing power. 30.000 mainly small or medium-sized companies located in the region as well as half a dozen universities (the HSL among them) provide for

a high degree of commercial, technical and scientific know-how. Labour resources are sufficient, settling companies can draw on a large pool of well-trained potential employees.

**County Stade:** In recent years, the County Stade has become an increasingly attractive location. The number of inhabitants increased by more than 15% to 195.201 between the years 1990 and 2004. Especially young families settled down in the area. The high number of commuters heading for Hamburg is another evidence for the high quality of life the County Stade offers. Additionally, there are lots of incentives to companies. The communities hold a supply of sites in high quality and quantity. Short-term approval times guarantee planning security. A good transport infrastructure including the seaport of Stade Bützfleth and the availability of motivated and qualified specialists in the region are advantages companies appreciate.

So, for good reason, even global players have made their decision for the County Stade. The main focus is on the aviation industry and its highly modern system solutions. The Airbus plant in Stade has evolved into a competence centre for carbon fibre technology and supplies Airbus with complete vertical tails for aircrafts. Expertise is also provided by KID-Systeme Ltd. in Buxtehude which produces cabin management systems and serves more than 120 airlines world-wide. The chemical industry particularly contributes to the positive economical development. Companies like Dow, Stähler Agrochemie and Synthopol boosted their works in the county through long-term investments. In addition, numerous less known innovative “market leaders” operate in the County Stade. Especially handicraft and manufacturing enterprises ensure a good diversity of branches. Still today, these branches are the pillars of the regional economy, even if the number of employees in the service sector has increased over the last years.

**County Harburg:** Right at the centre of the southern Hamburg metropolitan area, the County Harburg has already doubled its population since 1939. The purchasing power of its residents is the highest in Niedersachsen; unemployment is far below the national average. The region could easily take advantage of its favourable location between Bremen, Hamburg and Hannover.

Nevertheless, the County Harburg never found it easy to find its own identity. The county on its part gained new area through the consolidation of the counties of Harburg and Winsen in 1932, only to be cut five years later by the Greater Hamburg Bill. Through this law, the old suburb of Harburg was annexed to Hamburg. Therefore, the



county lost its natural cultural and economic centre. The County Harburg that is known today is characterised by its common border with the City of Hamburg and exists on this close socio-economic and transport integration.

The north of the county is strongly economically oriented. The highway network of A1, A7, A250 and A261, with the Maschener Intersection, the Horster Triangle and the Buchholzer Triangle provide the perfect transport infrastructure needed by any business for expansion. The southern part of the district is entirely different; here, consideration was given to the scenic beauty of the Lüneburg Heath Nature Reserve. Consequently, the local authorities have developed popular tourist communities at par with European standards, the most popular examples of which are Egestorf and Undeloh, Hanstedt and Jesteburg. The County Harburg is chosen by international companies such as the sportswear firm Kiltec or the OTC (Ostfriesische Tea Company) and also small and medium-sized enterprises as the location for their north European operations.

**County Lüneburg:** The County Lüneburg counts 173,716 inhabitants, 70,928 of whom live in Greater Lüneburg. The region reaches from the Elbe-Valley water meadow in the East over around 50 km south to the central Lüneburg Heath. Situated right in front of the gates of Hamburg, which can be reached in only 25 minutes thanks to the motorway A 250, the Town of Lüneburg provides the economic focus of the whole region. Important institutions such as the Leuphana – University of Lüneburg, the District Authority Administration, the Chamber of Trade and Industry, the Chamber of Trades and Crafts all have their seat in Lüneburg.

In the Lüneburg region modern enterprises and qualified employees find an optimum environment for ideas and innovations, developments and production to live and work in an intact environment. Colleges of higher education and research institutes in Lüneburg and nearby Hamburg provide support for technology transfer and with professional formation and continuing education. An excellent infrastructure, very good accessibility and a rich cultural life are further plusses, thereby fulfilling the demands of enterprises for a high performance commercial and industrial location. Industrial estates and qualified workforce are in sufficient supply.



## 2 METHODOLOGY

The approach of this study is very pragmatic; the methods serve this purpose more than any academic traditions. The way this study is conducted is qualitative in nature and even through some traditionally quantitative methods are used in a small scale, the study can be seen as qualitative, descriptive and empiric research. This study is an assessment and evaluation of the current situation in the Southern Metropolitan Region of Hamburg.

The development agencies are involved in the research in two phases. First they provide and check the information on their own organisation and activities. Secondly many of the development actors took part in the workshop and interviews conducted on development measures and the development atmosphere in this area. Companies were involved in filling in a short questionnaire and a few interviews on the measures and development activities.

The template used for describing and evaluating the development measures is a tool called the Logical Framework. This Framework provides a basis for subsequent monitoring and evaluation and has been used to assess development activities worldwide, such as the Interreg II C program. Another tool used for the research is the European Commission Impact Assessment Guideline.

The Logical Framework Approach is best used in addition to other methods and more specific questions based on the evaluation criteria. The criteria for evaluating Development Measures in this study are: Relevance, Impact, Effectiveness, Efficiency and Sustainability. All the tools used in this study are presented in more detail in the Appendix 1.



### 3 REGIONAL DEVELOPMENT IN GERMANY

Germany as a federal republic is made up of the Federation and 16 federal states also known as the Länder. According to the federalist principle of the constitution, the authority of the German state is divided between the Federation and the federal states. The federal states have their own state authorities and their own legislation.



Figure 5 Germany and its Länder

The German constitution defines the country's system as a democratic, constitutional, social and federal country. One of the main consequences of these principles is the separation of powers both in functional/administrative partitions and in territorial levels. The functional separation stands for a division of political power into legislative, judicative and executive. The territorial partitioning of power is reflected in the federal character of Germany. Each of the 16 Länder

has a constitution, an elected parliament and a state government. Each state is further divided into cities and counties.

Most of the Länder are governed by a cabinet led by a Prime Minister and a unicameral legislative body known as the Landtag. The Prime Minister appoints a cabinet to run the Land's agencies and to carry out the executive duties of the Land's government. With regard to Berlin, Bremen and Hamburg these Länder are run slightly different from the other states: the executive branch consists of a Senate of approximately eight members selected by the Land's parliament. The senators carry out duties equivalent to those of the ministers in the larger Länder. The parliaments in the remaining 13 Länder are referred to as Landtag. Germany's counties are administrative units. Being at an intermediate level of administration between the Länder and the local/ municipal levels, the majority of the counties are of rural character. Cities with more than 100,000 inhabitants do not usually belong to a county but take over county responsibilities themselves - similar to the concept of independent cities. The county parliament, in German the Kreistag, is the legislative body of the county. It is responsible for local self-administration. The executive authority is called Landrat or Landrätin who administers the county.

With three central levels of the Federation, the federalist structure of the German state has an essential influence on the system of spatial planning. Since Germany is characterised as a decentralised state, spatial planning is arranged through the legally determined distribution of responsibilities and tasks between the three levels of the Federation, the federal states and the municipalities. Spatial planning in Germany thus is a system of planning levels. The planning law in Germany consists of the Law of Raumordnung and of the Public Building Law. The former is being composed of the Federal Regional Planning Act and of the Acts of Raumordnung of the federal states. The latter is being composed of the Building Planning Law. Urban Land-Use Planning is in contrast to the Raumordnung a part of the concurrent legislation competence.

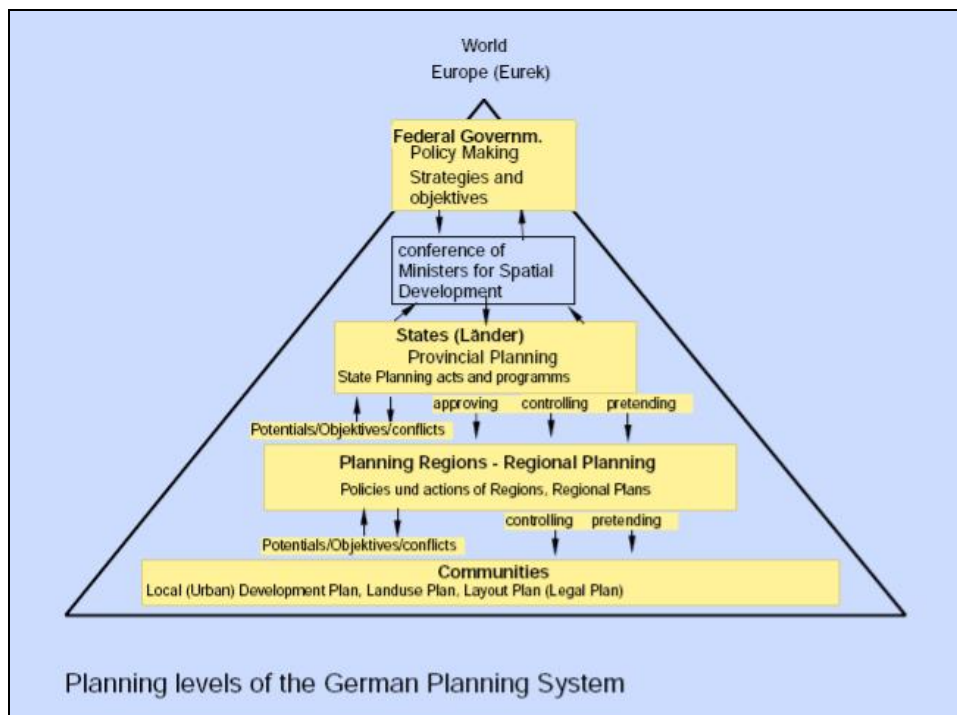


Figure 6 Planning levels of the German Planning System (University of Karlsruhe)

The Länder have political and administrative power to decide nearly all questions related to affairs within their territory and liability while the federal government mainly administrates and decides questions of national importance as foreign affairs, defence and national finance. In addition, the Federation has, among others, some powers regarding parts of infrastructure and environmental matters.

The main task for spatial planning on the state level is to prepare strategies for spatial development on the state territory. Each state should prepare a state development plan that represents the strategy for the state spatial development. This plan is concerned with the coordination of activities that have state-wide spatial significance and have to consider the special situation in different regions of the state. To coordinate the development plans of the different states, a ministerial conference on spatial planning is held.

Aiming at safeguarding a sustainable urban development and a socially equitable utilisation of land for the general welfare of the community, the main task for municipalities regarding urban land-use planning, as defined by law, is to prepare and control the use of land within the municipality. Each municipality is responsible for preparing

land-use plans in accordance with the regional development policy and is required to take responsibility for its urban land-use planning. Urban land-use planning on the municipal level is based on a two-tier system: The first implies the preparatory land use plan. Based on the intended urban development, this plan defines the type of land use for the whole municipality. The second level implies the development plan which represents the legally-binding land-use plan. It defines the detailed type and utilisation for individual land parcels or parts of the municipality.

With its regional planning policy, the Federal Government is striving to create equivalent social conditions in all sub-regions of Germany. This task is anchored in the constitution and must come to terms with the sweeping changes to which the German society is subject. Both, population figures, their internal make-up and also regional distribution present the policy with adaptation tasks, certain of which are entirely new. Germany's regional planning policy develops strategies for managing the differential development of growing and shrinking regions in close spatial proximity. More than ever before, regional planning and regional development now also have to act under conditions of increasing international, locational competition. Regional planning development objectives are focussed more extensively on the conditions of generating prosperity than on its distribution. A shift away from primarily compensation-oriented distribution to targeted support for specific, regional potentials and strengths must be achieved. Thus, different regional conditions and development potential must be taken into consideration, as the different sub-regions also fulfil different functions as a result of their regional structure and location.

A crucial logistics-related planning tool with regional impact is the **Federal Transport Infrastructure Plan (FTIP)**. It is a framework investment plan and a planning tool, but not a funding plan or programme. The up-to-date version was adopted by the Federal Cabinet at its meeting on 2nd July 2003. The FTIP defines and prioritises infrastructure projects (modernisation, upgrading, construction) concerning the German road, rail and waterway modes.

According to the FTIP 2003, the total level of funding available for the road, rail and waterway modes for the period from 2001 to 2015 is around 150 billion euros. A planning reserve on top of this will make it possible for planning to go ahead on projects where sizeable shares of the funding will not be required until after 2015 but which have to be planned as a whole before that date. It ensures that there is alternative potential construction work that can be performed if the realisation of other projects experiences delays.



Maintenance of the existing networks accounts for around 83 billion euros. The share of the total level of investment earmarked for maintenance has increased from 46% in the FTIP '92 to almost 56%. Around 66 billion euros (excluding the planning reserve) is earmarked for the construction of new and the upgrading of existing federal railway infrastructure, federal trunk roads and federal waterways. The ratio of investment in the old and new federal states - including the planning reserve - is 65 to 35%.

The FTIP defines first priority and second priority projects. These categories are subdivided as follows: a) ongoing and definitely planned projects; b) ongoing and definitely planned projects with a special nature conservation planning mandate for the first priority category; c) new projects; d) new projects with a special nature conservation planning mandate for the first priority category; e) new projects with planning go-ahead; f) new projects with planning go-ahead and a special nature conservation planning mandate; g) new projects; h) new projects where a high ecological risk has been identified.

The FTIP 2003 follows the guiding policy principle of "development of Eastern Germany and upgrading in Western Germany". Alongside their evaluation on the basis of updated benefit-cost analysis, all projects have been subjected to an environmental and nature conservation assessment and classified in terms of the ecological risks they pose. In addition, the regional planning significance of the projects has been identified more comprehensively than in the past by means of a spatial impact assessment.



## **4 REGIONAL DEVELOPMENT IN THE SOUTHERN METROPOLITAN REGION OF HAMBURG**

### **4.1 General**

The principles and tools described in Chapter 3 also apply for the regional development in the Southern Metropolitan Region of Hamburg. The main task for the municipality is to prepare and control the use of land within the region. It is responsible for preparing land-use plans in accordance with the regional development policy and is required to take responsibility for its regional planning.

With regard to regional development in Germany, there are several public and public-private actors who take part in this process. Chapter 4.2 will name the relevant regional development organisations of the Southern Metropolitan Region of Hamburg acting in the fields of spatial planning, logistics and ICT for the benefit of the regional business sector.

### **4.2 Regional Development organisations**

#### **4.2.1 The Hamburgische Gesellschaft für Wirtschaftsförderung (HWF)**

The HWF, also known as Hamburg Business Development Corporation, acts as a service partner and main contact for any company wanting to expand, restructure or relocate in the Greater Hamburg Region.

Table 1 Organisational description of the Hamburg Business Development Corporation

Attributes	The HWF
Background of the organisation	<p>HWF acts as a pilot and go-between for its clients, voicing their interests to public authorities and institutions - and in individual cases even to political bodies. HWF supplies answers to all kinds of questions about permits, licenses and regulatory matters, helps overcome bureaucratic hurdles.</p> <p>HWF supports its clients in searching for and developing property, industrial premises or offices from the private or public sector. Property developers and investors are assisted in speeding up the implementation of major projects.</p>
Size of the organisation	Employees: approx. 30
Location	City of Hamburg
Overall goal / Mission	<p>HWF Hamburg Business Development Corporation is a private-enterprise consultancy company that specially supports growing companies in their plans to expand, restructure or invest in Hamburg. It is also the driving force in the development of future-oriented industries.</p> <p>HWF: Main tasks</p> <ul style="list-style-type: none"> <li>• Bringing in international companies</li> <li>• Supporting local business</li> <li>• Locational marketing</li> <li>• Cluster management</li> </ul>
Funding	HWF's shareholders are the City State of Hamburg, Hamburg Chamber of Commerce, Hamburg Chamber of Skilled Trades and a consortium of leading commercial banks.
Target audience	HWF acts as a central contact, consultancy and service partner for companies from every sector of the economy.
Main outputs	<p>HWF's consultancy service is provided in strict confidence and free of charge. The range of services offered is extensive, particularly in the property sector. International companies can look forward to working with a team of experienced project managers with plenty of practical experience.</p> <p>HWF's national service:</p> <ul style="list-style-type: none"> <li>• Locational advice</li> <li>• Support in acquiring suitable offices or industrial premises via the HWF database</li> <li>• Advice on regulatory matters</li> </ul>

	<ul style="list-style-type: none"> <li>• Advice on subsidy programmes</li> </ul> <p>HWF's international service: International companies looking for the right business location in Germany can also call on a number of other services:</p> <ul style="list-style-type: none"> <li>• Extensive locational information</li> <li>• Help in setting up business in Hamburg</li> <li>• Support in procuring residence and work permits</li> <li>• Cluster management</li> </ul>
Logistics/ICT projects	Cluster Management Hamburg Logistics Initiative
Marketing channels	Brochures, Monthly Newsletter, Leaflets Website: <a href="http://www.hamburg-economy.de">http://www.hamburg-economy.de</a>
Other, specify:	<p>Economic power: Hamburg is one of the most productive regions in Germany and Europe. The GDP per person in gainful employment is 76,000 euros, and has been above the national average (56,600 euros) for many years. Over the past two years the lead has been increasing. Hamburg is the leading logistics centre in northern Europe. Port and logistics are booming:</p> <ul style="list-style-type: none"> <li>• Record level of container traffic: 8,1 million TEU (2005), or a rise of 15.5%</li> <li>• Europe's second biggest seaport</li> <li>• Around 131,000 jobs depend directly or indirectly on the port (2004) - an increase of 6,000 since 2001</li> <li>• 14,000 additional jobs by 2015 (forecast of Regionomica survey)</li> <li>• 230,000 employed in the metropolitan region including port logistics 5700 companies in Hamburg (2003)</li> </ul>

#### 4.2.2 The Hamburg Port Authority (HPA)

The Hamburg Port Authority is in charge of the port management. It was formed in 2005 as a public institution with full legal status in order to concentrate the city's port-related competencies, to enhance operational and financial flexibility in the port's management with regard to the fierce competition between seaports, and to realise the principle of "one face to the customer". It is able to represent the

interests of the companies based within the port area in a quicker and more target-oriented manner than its preceding organisations.

Table 2 Organisational description the Hamburg Port Authority

Attributes	The HPA
Background of the organisation	The HPA is in charge of the administration of the port of Hamburg in all respects.
Size of the organisation	Employees: 1,600
Location	Hamburg
Overall goal / Mission	The HPA puts the 2005 Port Development Plan of the port of Hamburg into operation, thereby creating the infrastructural conditions necessary in the medium-term with regard to the ongoing dynamic development of the port economy
Funding	The HPA relies on its own budget which is made up of port revenue such as rents and fees as well as public capital.
Target audience	Companies based or operating in port
Main outputs	<ul style="list-style-type: none"> <li>• Financing and allocation of infrastructure investments</li> <li>• Acquisition and provision of the required areas for port-related companies</li> <li>• Organisation of the sovereign tasks and services associated with the port economy</li> <li>• Application of business management principles</li> <li>• Market-driven and transparent regulation of port prices and port investments by means of direct allocation of public revenue and expenditure at the port within the framework of an independent budget</li> <li>• Customer-oriented bundling of all port tasks, raising the profitability by optimising the expenditure side</li> </ul>
Logistics/ICT projects	<p>The most important are:</p> <ul style="list-style-type: none"> <li>• Upgrading the port's rail and road transport infrastructure</li> <li>• Extending existing quay facilities and exploiting all potential capacity for container handling</li> <li>• Preparations for a new container terminal to be built in the central free port</li> </ul>

	<ul style="list-style-type: none"> <li>• Deepening of the fairways of the Lower and the outer Elbe</li> </ul>
Marketing channels	Brochures, Leaflets Web pager in English: <a href="http://www.hamburg-port-authority.de">http://www.hamburg-port-authority.de</a>
Other, specify:	<p>Economic power: Hamburg is one of the most productive regions in Germany and Europe. The GDP per person in gainful employment is 76,000 euros, and has been above the national average (56,600 euros) for many years. Over the past two years the lead has been increasing. Hamburg is the leading logistics centre in northern Europe. Port and logistics are booming:</p> <ul style="list-style-type: none"> <li>• Record level of container traffic: 8,1 million TEU (2005), or a rise of 15.5%</li> <li>• Europe's second biggest seaport</li> <li>• Around 131,000 jobs depend directly or indirectly on the port (2004) - an increase of 6,000 since 2001</li> <li>• 14,000 additional jobs by 2015 (forecast of Regionomica survey)</li> </ul> <p>230,000 employed in the metropolitan region including port logistics 5700 companies in Hamburg (2003)</p>

#### 4.2.3 The Hamburg Logistics Initiative

As a measure to enhance Hamburg's position as the leading centre for logistics in northern Europe, the Hamburg State Ministry of Economic and Labour Affairs and the city's business community have created the Logistics Initiative Hamburg.

Table 3 Organisational description the Hamburg Logistics Initiative

Attributes	Logistics Initiative Hamburg
Background of the organisation	<p>Founded in 2006, the Logistics Initiative's aim is to build a network within the business, academic and research community, promoting general recognition of the metropolitan region of Hamburg as a prime location for logistics.</p> <p>The Logistics Initiative Hamburg is organised around a central Cluster Management. Cluster Management is steered by a</p>

	Board of Trustees consisting of the Logistics Coordinator and a line-up of leading business executives. The Initiative is flanked by the support of the "Logistik-Initiative Hamburg e. V." and its members.
Size of the organisation	10 members including 4 cluster managers of whom three are representatives of the Hamburg State Ministry of Economic and Labour Affairs. One is a delegate of the Wachstumsinitiative Süderelbe AG which is the Logistic Initiative's agent in charge for the southern Hamburg Metropolitan Region.
Location	City of Hamburg
Overall goal / Mission	The Logistics Initiative will effect sustained, ground-level improvements for all areas of the logistics industry in the metropolitan region. This will provide an important stimulus for renewed growth and more employment. Adding approx. €6 billion to the value chain and creating up to 14,000 new jobs by 2015 is possible if all sides work hand in hand, according to an analysis carried out by consulting firm Regionomica.
Funding	The Logistics Initiative is funded by the City-State of Hamburg, flanked by the support of the members of the "Logistik-Initiative Hamburg e. V."
Target audience	National and international logistics companies as well as companies from related industries.
Main outputs	<p>The Logistics Initiative Hamburg provides a wide range of activities from which companies can benefit:</p> <ul style="list-style-type: none"> <li>• It regularly organises workshops, research groups and conventions on current issues of the logistics field.</li> <li>• It offers a comprehensive consulting service which includes communication with authorities and institutions, as well as support in administrative or permit-related matters and the search for new real estate.</li> <li>• It carries out promotional campaigns to enhance the profile of the Hamburg location and its companies nationally and abroad.</li> <li>• It will push for an exhaustive utilisation of the existing IT, research and development competence within companies, academia and other educational institutions.</li> </ul> <p>The Logistics Initiative has the central task of safeguarding the labour potential for the Hamburg logistics industry in the short</p>



	and long term. There will be a joint effort with firms and educational institutions to implement relevant academic, vocational and in-service training projects.
Logistics/ICT projects	In all fields of action named above
Marketing channels	Brochures, Monthly Newsletter, Leaflets Website: <a href="http://www.hamburg-logistik.net">http://www.hamburg-logistik.net</a>
Other, specify:	<p>The Metropolitan Region of Hamburg is one of the world's logistics hot spots. Multinational corporations run their global logistics networks from here supported by service specialists from virtually every field.</p> <p>The Metropolitan Region of Hamburg is superbly connected to all means of transportation – waterways, roads, rail road and by air – allowing for goods of any kind and quantity to be distributed optimally.</p> <p>With regards to Hamburg, logistics are a guarantee for favourable economic development. World trade will continue to grow, and therefore port turnover will increase just as steadily as expenditures for steering the global flow of commodities.</p> <p>Finding the most highly qualified staff is no problem for companies in the Metropolitan Region of Hamburg. There is a multitude of educational institutions providing top-level vocational and in-service training at all levels of qualification.</p>

#### 4.2.4 The Wachstumsinitiative Süderelbe AG

As mentioned in Chapter 1.2, the SAG appeals to achieve sustainable economic development in the southern Hamburg metropolitan region by forming networks and accomplishing project-oriented cooperation between regional companies, service providers, scientific institutions and authorities.

Table 4 Organisational description of the Wachstumsinitiative Süderelbe AG

Attributes	Wachstumsinitiative Süderelbe AG
Background of the organization	The Süderelbe AG focuses on promoting growth in the Southern Hamburg Metropolitan Region. This region encompasses Hamburg-Harburg and three

	<p>administrative districts of Lower Saxony/ Niedersachsen – Stade, Harburg and Lüneburg. Süderelbe AG was founded to provide one-stop-agency-services beyond the administrative borders of the districts. Süderelbe AG's cross-border cluster strategy promotes economic growth and an increase in employment by means of enhancing the innovative ability and competitive position of local enterprises. The company is integrated part of the logistics initiatives in Hamburg and Niedersachsen.</p>
Size of the Organization	Employees: approx 15
Location	Southern Hamburg Metropolitan Region
Overall goal / Mission	<p>The main goal of Süderelbe AG is to boost innovative and competitive potency for the Süderelbe region in order to strengthen the economy and create new jobs. Süderelbe AG cooperates with its shareholders and project partners in terms of a 'private public partnership' – the involvement of enterprises comes to the fore. This priority is reflected in the structure of the shareholders: one third consists of commercial enterprises, one third includes banks and savings banks and the last third comprises regional authorities. The specific measures and projects are directed towards enterprises based in the Southern Hamburg Metropolitan Region which intend to transform their business ideas into products or services ready for the market.</p> <p>Süderelbe AG aims at providing sustainable enhancements in economic performance by:</p> <p>Extending existing strengths and location factors</p> <ul style="list-style-type: none"> <li>• Developing clusters through integration of a large number of enterprises</li> <li>• Straightforward planning and enforcement of relevant projects with cross-national characteristics</li> <li>• More efficient business development through sophisticated services</li> </ul>
Funding	By stakeholders and the governments of the federal states of Hamburg and Niedersachsen
Target audience	Companies, investors and municipalities in the Southern Hamburg Metropolitan Region

Main outputs	<ul style="list-style-type: none"> <li>• Development and implementation of cluster-projects</li> <li>• Consulting of companies in all phases of settlement</li> <li>• Marketing of land and commercial property</li> <li>• Networking between investors and users</li> <li>• Advice on EU development schemes</li> <li>• Promotion of further education and professional training</li> </ul>
Logistics/ICT projects	<ul style="list-style-type: none"> <li>• Cluster Management logistics in the Southern Hamburg Metropolitan Region</li> <li>• Logistics 50+</li> <li>• LogOn Baltic</li> <li>• Development of logistic parks</li> <li>• Development of a centre of competence in logistics</li> </ul>
Marketing channels	<p>Newsletter, Leaflets</p> <p>Website: <a href="http://www.suederelbe.info">http://www.suederelbe.info</a></p>
Other, specify:	<p>The highway network of A1, A7, A250 and A261 together with the Maschener Intersection, the Horster Triangle and the Buchholzer Triangle provide the perfect transport infrastructure needed by any business for expansion. The harbours in Hamburg and Stade-Bützfleth are important hubs for the access to the world wide logistic networks.</p>

#### 4.2.5 The Wirtschaftsförderung Landkreis Harburg (WLH)

The WLH, the Business Development Corporation of the county Harburg, was founded in 1998. The WLH is specialising in comprehensive local economic promotion services in the Harburger Land, which forms the centre of the southern Hamburg metropolitan region in northern Niedersachsen. The WLH sees itself as a permanent intermediate between the interest of companies and the communities.

Table 5 Organisational description of the Business Development Corporation of the county Harburg

Attributes	The WLH
Background of the organisation	The Business Development Corporation of the county Harburg (WLH) offers economic support services in the Harburger Land.
Size of the organisation	Employees: approx. 4
Location	Southern Metropolitan Region of Hamburg
Overall goal / Mission	<p>The main objective is the creation of jobs in the region through:</p> <ul style="list-style-type: none"> <li>• promotion of innovative technologies, products and services</li> <li>• promotion of start-ups</li> <li>• promotion of professional qualification</li> </ul> <p>The WLH attends to businesses in expeditious and careful start-up or relocation through:</p> <ul style="list-style-type: none"> <li>• location search and selection</li> <li>• financial support research</li> <li>• support in official permit processing</li> <li>• actual site-development of commercial areas</li> </ul>
Funding	By the owners
Target audience	Companies in the administrative district Harburg
Main outputs	<p>Services in the Harburg District</p> <ul style="list-style-type: none"> <li>• Development of business sites</li> <li>• Location service</li> <li>• Service day for entrepreneurs</li> <li>• Many ongoing projects and events in the Harburg District</li> </ul>
Logistics/ICT projects	Distribution center Lidl Travelplaza
Marketing channels	Yeared Report, Leaflets Web pager in English: <a href="http://www.wlh.eu">http://www.wlh.eu</a>
Other, specify:	The highway network of A1, A7, A250 and A261, with the Maschener Intersection, the Horster Triangle and the Buchholzer Triangle provide the perfect transport infrastructure needed by any business for expansion

#### 4.2.6 The Wirtschaftsförderung Lüneburg (W.LG)

The W.LG, the Business Development Corporation of the County Lüneburg is a customer-oriented enterprise specialising in location consultancy.

Table 6 Organizational description of the Business Development Corporation of the County Lüneburg

Attributes	The W.LG
Background of the organisation	<p>The Business Development Corporation is a customer-oriented enterprise specialising in location consultancy. It operates as a competence centre for contacts between enterprises in and around Lüneburg. The corporation focuses on the fields of care of enterprises, investors' acquisition, elaboration and conception of location development as well as area management by using the network of regional institutions, chambers and administrations, credit institutes as well as private enterprises and consultants.</p> <p>The task consists in the creation of an economic surrounding that will allow local enterprises to further develop and to encourage the implantation of new ventures in the area.</p> <p>Yet, structural change and the increasing globalisation of economic activities demand constant further development. The W.LG is particularly aware of these special tasks. The corporation and the District of Lüneburg therefore put at the disposal of enterprises and new businesses a large selection of free industrial areas and buildings.</p> <p>These free services aim at helping local as well as non-local enterprises quickly and without bureaucracy in their search for a location in Greater Lüneburg and in the County Lüneburg.</p>
Size of the organisation	Employees: 5
Location	Southern Metropolitan Region of Hamburg

Overall goal / Mission	<p>The main objective is the creation of jobs in the region through:</p> <ul style="list-style-type: none"> <li>• information on advantageous subvention possibilities</li> <li>• arrange all contacts with the appropriate authorities</li> <li>• search for suitable premises or commercial space</li> <li>• arrangement of the necessary contacts</li> <li>• Maintaining and further developing existing enterprises</li> <li>• Helping the implantation of new enterprises and industries</li> <li>• Furthering the creation of new ventures and innovations</li> <li>• Creating a competitive environment and strengthening the economic region of Lüneburg in the long term</li> </ul> <p>The New Enterprise Network for the Lüneburg Region is a voluntary association of institutions and persons who wish to assist the foundation of new enterprises in the District of Lüneburg.</p>
Funding	By the owners
Target audience	Companies in the administrative district Lüneburg
Main outputs	<p>Services in the Lüneburg District</p> <ul style="list-style-type: none"> <li>• Development of business sites</li> <li>• Location service</li> <li>• Service day for entrepreneurs</li> <li>• projects and events in the special fields food processing and special engine construction</li> </ul>
Logistics/ICT projects	Development of inland port (from container handling port to logistics service provider)
Marketing channels	<p>Yearned Report, Leaflets</p> <p>Web pager in English:  <a href="http://www.lueneburg-wirtschaft.de/english/index.html">http://www.lueneburg-wirtschaft.de/english/index.html</a></p>
Other, specify:	<p>The economic region of Lüneburg is situated at the intersection between the new markets in the East, Scandinavia in the north and western Europe, south of the metropolis of Hamburg. Thanks to the high-performance access ways (Motorway A250, main line train Hamburg-Hanover), Hamburg can be reached in 30</p>

	minutes, thereby fulfilling the demands of enterprises for a high performance industrial location. Industrial estates and qualified workforce are in sufficient supply.
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#### 4.2.7 The Wirtschaftsförderung Landkreis Stade (WfS)

The Business Development Corporation of the County Stade is the central contact for companies and business founders in search of a site and/or co-operation partners.

Table 7 Organisational description of the Business Development Corporation of the County Stade

Attributes	The WfS
Background of the organisation	The County Stade is a high-performance region in which the municipalities act as service providers for their citizens and the domestic industry. Attractive general conditions offer special incentives to companies. The municipalities are able to provide industrial areas in high quality and quantity. Short-term approval times guarantee planning security. The availability of motivated and qualified specialists in the region is an advantage companies appreciate. The County Stade Business Development Corporation contributes significantly to this favourable situation. It acts to maintain and improve the status quo. It therefore offers manifold services in order to encourage entrepreneurialism and support business of any kind in the County Stade.
Size of the organisation	Employees: 2
Location	City of Stade, County Stade, Southern Hamburg Metropolitan Region
Overall goal / Mission	The County Stade Business Development Corporation acts as a central contact for companies and start ups in search of a site or business partners. It provides advice on all general and economic matters related to the County Stade.
Funding	The County Stade Business Development Agency's

	shareholders are the County and the City of Stade, several municipalities and banks.
Target audience	National or international companies from every sector of the economy settled or willing to settle in the County Stade.
Main outputs	<p>Main tasks and fields of action:</p> <ul style="list-style-type: none"> <li>• Locational advice</li> <li>• Support in acquiring suitable offices or industrial premises</li> <li>• Support in finding suitable business partners</li> <li>• Advice on all matters related to setting up new business</li> <li>• Advice on regulatory matters</li> <li>• Advice on subsidy programmes</li> </ul> <p>Services include:</p> <ul style="list-style-type: none"> <li>• Consulting of enterprises located in the district of Stade</li> <li>• Consulting and support of entrepreneurs</li> <li>• Consulting and support of enterprises willing to relocate</li> <li>• Consulting in settlement and site-related matters</li> <li>• Information on development plans</li> <li>• Intermediations of business contacts</li> <li>• Current information regarding the region and its economy</li> </ul>
Logistics/ICT projects	Development of Port of Stade-Bützfleth and its hinterland
Marketing channels	Brochures, Reports, Exhibitions Website: <a href="http://www.wf-stade.de">http://www.wf-stade.de</a>
Other, specify:	<p>For good reason, even some global players like Airbus settled within the borders of the County Stade. The Airbus plant in the City of Stade has by now evolved into a competence centre for the carbon fibre technology. Expertise for the aviation industry is also provided by KID-Systeme Ltd. in Buxtehude which produces cabin management systems and serves more than 120 airlines world-wide.</p> <p>The chemical industry plays a strong role in the regions economy. It is represented by companies like Dow, Stähler Agrochemie and Synthopol which all made long-term investments in their local plants.</p>



	<p>Furthermore, numerous less known “market leaders” attend to their business in the region. Especially handicraft and manufacturing enterprises ensure a good diversity of economic branches.</p> <p>Moreover, there are promising infrastructure projects being planned or executed: The highway A 26, running from Stade to Hamburg, is already under construction. The South bound A 22, crossing the river Elbe in the West of Stade, is currently being planned.</p>
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#### 4.2.8 The Logistics Initiative Niedersachsen

As a measure to strengthen Niedersachsen's relevance as an eminent location for logistics and to enhance the economic importance of the regional logistics sector, the Niedersachsen State Ministry of Economic, Labour and Transport Affairs has created the Logistics Initiative Niedersachsen.

Table 8 Organisational description of the Logistics Initiative Niedersachsen

Attributes	Logistics Initiative Niedersachsen
Background of the organization	<p>Founded in April 2004, the Logistics Initiative Niedersachsen is primarily aimed at building a transnational business network and the improvement of communication and exchange within the transport and logistics branch.</p> <p>The Logistics Initiative Niedersachsen is organised around a central agency or branch office which acts as a central contact and information source. This branch office is steered by a Board of Trustees. Additionally, there are three task groups dealing with various subjects like logistics projects, location marketing and vocational training &amp; further education.</p> <p>The Logistics Initiative Niedersachsen is associated with the Wachstumsinitiative Süderelbe AG on the working level.</p>

Size of the Organization	Employees: 4
Location	City of Hannover, Niedersachsen
Overall goal / Mission	<p>The Logistics Initiative acts as a one stop agency for all logistics related matters in Niedersachsen and beyond. It is the driving force in the development of a broad business network. Its service is provided free of charge</p> <p>Main tasks:</p> <ul style="list-style-type: none"> <li>• Networking and linking-up of business interests and activities. Support of regional, national and international business co-operations</li> <li>• Promotion of the general recognition of Niedersachsen as a prime location for logistics, nationally and internationally</li> <li>• Bringing in international companies</li> <li>• Support of start up's in the logistics sector</li> <li>• Advice on and improvement of subsidy programmes for logistics</li> </ul> <p>Improvement of vocational training &amp; further education programmes</p>
Funding	The Logistics Initiative is funded by the Niedersachsen Ministry of Economic, Labour and Transport Affairs
Target audience	National and international logistics companies as well as companies from related industries, business development corporations and logistic centres
Main outputs	<p>The Logistics Initiative provides a wide range of activities from which companies can benefit:</p> <ul style="list-style-type: none"> <li>• It has created a web-based communication and information platform in order to facilitate the transfer of knowledge</li> <li>• It operates three task groups on important issues of the logistics field</li> <li>• It regularly organises logistics workshops and conventions and supports research in logistics</li> <li>• It offers a consulting service to all business partners</li> </ul> <p>It carries out promotional campaigns to enhance the profile of logistics locations in Niedersachsen</p>
Logistics/ICT projects	Creation of a marketing master plan logistics for Niedersachsen, research on investments in the logistics

	sector in Niedersachsen, build-up of a logistics vocational training & further education network etc.
Marketing channels	Brochures and leaflets Website: <a href="http://www.logistikportal-niedersachsen.de">http://www.logistikportal-niedersachsen.de</a>
Other, specify:	<p>Niedersachsen is superbly connected to all means of transportation – waterways, roads, railroad and by air – allowing for goods of any kind and quantity to be distributed optimally. The Port of Hamburg is in relatively close reach from almost every location in Niedersachsen.</p> <p>There is a multitude of educational institutions providing top-level vocational and in-service training at all levels of qualification. Niedersachsen counts:</p> <ul style="list-style-type: none"> <li>• 250.000 employees in the logistics sector</li> <li>• Round about 650 logistics service providers</li> </ul>



## 5 DEVELOPMENT MEASURES

### 5.1 General

With regards to the regional development organisations of the Southern Metropolitan Region of Hamburg mentioned in Chapter 4, these organisations as well as other several associations in the region execute development measures for the logistics and ICT sector which will be introduced below.

### 5.2 Logistics-related development measures in the Hamburg Metropolitan region according to the Federal Transport Infrastructure Plan 2003

Hamburg's economic success depends on the improvement of seaward approaches as well as productive and efficient hinterland connections. In 2003, Germany's Minister for Transport, Building and Housing presented a plan which sets priorities for development of the national transport network up to 2015. According to the FTIP 2003, these are the major infrastructure projects for the Hamburg metropolitan region:

- Rail:
  - Construction of a "Y"- rail line Hamburg/ Bremen-Hanover
  - Construction of 3rd rail track between Stelle and Lüneburg
  - Expansion and electrification of Hamburg-Lübeck line
  - Double track expansion Neumünster- Bad Oldeslö line
  - Underpass construction Wilhelmsburg
- Road:
  - 8 or 6-lane expansion of A7 south of Elbe tunnel to A26, and north of tunnel up to Bordesholm triangular junction
  - Construction of A26 towards Stade
  - 6-lane expansion of A1 between Hamburg- Billstedt junction and Hamburg- Southeast triangular junction, and between Buchholz triangle and Bremen

- Construction of A39 Lüneburg-Wolfsburg

### 5.3 The logistics-related development measures implemented by the Hamburg Port Authority

In a period of dynamic international trade expansion, container handling and logistics are the Hamburg region's guarantee of growth. If suitable sites are not forthcoming within the existing port area, sufficient expansion space has to be put at the port's disposal. Unlike competitive European ports, Hamburg with its dense settlement has no possibility of expanding beyond the limits of the port.

The Senate of Hamburg, in close conjunction with the port industry, carefully observes and analyses developments in handling and capacity to make strategic decisions. The Senate has approved a special investment programme for the port to speed up expansion of capacity and to provide sites for location of logistics businesses. This programme, which is administered by the HPA, has the following objectives (see Appendix 1):

- Adapting the fairways in the Lower and Outer Elbe to meet the demands of the transport industry
- Construction of additional container handling capacity in good time, to be realised with private port industry
- Preparation of more large sites for logistics firms, over and above existing supply
- Ensuring adequate site and traffic infrastructure for conventional general cargo terminals, bulk cargo handling facilities and port-related services
- Safeguarding development opportunities for port industrial locations dependent on sea transport, to reinforce the economic structure of the city and metropolitan region
- Expansion of port rail links, particularly eastwards, and urgent implementation of other rail projects in the hinterland, as well as development of the port rail system to make it competitive
- Continuously upgrading road infrastructure in and approaching the port to meet increasing traffic demand
- More intensive use of eco-friendly and cost-efficient inland water transport, in particular through environmentally sound development of the inland waterway system

- Safeguarding and further development of the tidal Elbe as a natural resource to accommodate draught of ocean going vessels
- Improving and optimising IT services and connections with port industry.

#### 5.4 Logistics and ICT-related measures and Projects initiated by the Logistics Initiative Hamburg

In order to remain at the top in the future and to continue performing at high level, the region's economy has been working hand in hand with the Senate of the City of Hamburg within the framework of the Logistics Initiative Hamburg since 2006:

- The Logistics Initiative Hamburg carries out promotional campaigns to enhance the profile of the Hamburg location and its companies. Using every possible channel - whether it is the internet or print media, trade fairs or talking with journalists - the advantages of Hamburg and then Metropolitan region as a location is permanently communicated nationally and abroad.
- The Logistics Initiative regularly organises workshops, research groups and conventions on current issues of the logistics field, e.g. the implementation of the RFID technology. This emerging network presents companies with ideal opportunities to make and maintain contacts (see Appendix 1).
- The Logistics Initiative offers a comprehensive consulting service. It includes communicating with authorities and institutions, as well as support in administrative or permit-related matters and the search for new real estate.
- "Learn Logistics": In close co-operation with the Hamburg Chamber of Commerce, the Logistics Initiative has created a new web-based information centre specialising in all logistics education matters. According to the motto "Learn Logistics", this web page informs comprehensively about existing logistics education and (further) training programmes in the Metropolitan region. It aims to provide an orientation guide for all interested in logistics careers, young and old, employed or not. This platform thus contributes to the fact that more qualified logistics personnel is needed in the future and that

the Metropolitan region will stay a leading logistics location only with a sufficient labour supply.

## 5.5 Logistics-related Projects of the Wachstumsinitiative Süderelbe AG

For the benefit of the regional business sector and companies from abroad willing to set up business in the region, the services of the SAG comprise a broad range of measures and functions such as:

- Development of clusters and cluster management respectively
- Promotion of the region as a pro-business location (e.g. via exhibitions, fairs etc.)
- Development and marketing of commercial and industrial real-estate
- Comprehensive locational advice and settlement management
- Acquisition of investors and networking between investors and interested parties
- Advice on national and EU subsidy programmes
- Networking between SMEs and regional research & development facilities with regard to the development and implementation of state-of-the-art technology
- Stimulation of corporate innovation projects
- Backing of qualification schemes and vocational training measures
- Organisation of networking events, e.g. lectures, field trips etc.

Among these tasks, the identification and marketing of suitable sites, on the one hand, and the attraction and support of companies from abroad, on the other hand, have emerged as the focal points of the SAG's activities so far. In this respect, the SAG provides comprehensive advice in all settlement-related matters from one source, thus acting as a one-stop agency.

Concerning the logistics cluster in particular, the Wachstumsinitiative Süderelbe AG is currently involved in the following measures and projects (besides "Logon Baltic"):

- Build-up of a "Logistics Cluster" by means of the integration of local companies into regional networks and cooperation projects. The cluster development is a multi-stage process



still in its first phase. Up to date, the SAG has identified relevant regional players and their respective project interests and carried through several logistics events in order to build the foundations of a future network. The next step will be to define and implement cooperative projects designed to transform business ideas into successful products or services (see Appendix 1).

- Conceptual design and implementation of state of the art logistics business parks in cooperation with specialised developers of distribution facilities.
- “Logistik 50+”: This project, essentially sponsored by the German Federal Ministry of Labour, is about the reintegration in the logistics sector of long-time unemployed men and women aged fifty and older through dedicated qualification measures. In the course of this project the SAG works hand in hand with five partners from the southern Hamburg metropolitan region and performs primarily project management, networking and public relations functions.
- Cooperation with and support of the Logistics Initiative Hamburg and the Niedersachsen Logistics Initiative. The SAG is organisationally interlocked with the Logistics Initiative Hamburg (founded in 2005) as SAG’s Head of Cluster Development Dr.-Ing. Jürgen Glaser is at the same time an advisory member of the Logistics Initiative’s management. The SAG thus acts as the Logistics Initiative’s agent in the southern Hamburg metropolitan region and provides cross-border access to an important regional logistics network and its resources vice versa. Cooperation with the Niedersachsen Logistics Initiative on the other hand is still an informal liaison designed to exchange information about ongoing developments and projects in the regional logistics sector.
- Still in its first phase of planning, a Logistics Competence Centre for the metropolitan region will be developed. The Logistics Centre will be unique regarding the tasks it will offer: pooling of know how and specialised logistic-related services in one centre; creation of a basic infrastructure, central services, transfer and management of knowledge, cluster and network management, support of entrepreneurs, amelioration of requirements in settlement and start up-related matters, PR and exhibition work.

## 5.6 The ICT Initiative Hamburg@work

The association Hamburg@work was founded in 1997 and is an initiative for media, IT and telecommunication.

Funded by the City of Hamburg and several Hamburg based enterprises, the association today has over 2,500 members and represents the largest network in the digital branch nationwide. With a broad range of service and support (networking, events, working groups), Hamburg@work is the first contact for questions regarding digital economy. The association aims to develop Hamburg's position as a media metropolis and supports enterprises operating in this sector.

## 6 CONCLUSIONS

The analysis of the current situation of the regional development and the existing development measures in the Hamburg metropolitan region in general and the southern metropolitan region in particular shows that there is a multitude of institutions with the aim to strengthen the region's development, especially in the logistics sector, by means of different development measures. In contrast to the DEMIA analysis produced by the LogOn Baltic project in South-West Finland, these institutions are relatively well known to companies already located in the region or willing to settle. With the support of these institutions and their established networks, logistics companies are able to expand and to make Hamburg the economically successful region as it is.

Hamburg is characterised as a rather dynamic economic area and is, as a matter of fact, one of the most dynamic economic regions in whole Europe. With regard to the city as a logistics location, the SWOT analysis prepared by the Logistics Initiative Hamburg shows that Hamburg's strengths' not only lie in the marketability and customer proximity but also in the excellent support of the logistics business by Hamburg's government (see Appendix 2):

- Quantity and spectrum of logistics companies: 92%
- Marketability and customer proximity: 89%
- Support of the logistics business by Hamburg's government: 69%
- Logistic consultancy and service: 65%
- Labour force potential: 55%

Nevertheless, Hamburg has its weak points concerning infrastructure, the hinterland connection (33%) as well as the availability of commercial and industrial real estate for logistics and IT companies (15%) within the city borders. Therefore, a strong cooperation with the neighbouring regions is required so that Hamburg will remain a competitive location in the future. Regarding the hinterland connection, the Hamburg government and the HPA in particular call for measures of improvement in the next few years to guarantee an excellent infrastructural system connecting Hamburg and its neighbouring area (see 5.2 and 5.3). In the surrounding region of Hamburg, and especially in the South of Hamburg, there are still

approximately 500 ha of sites suitable for commercial and industrial use available. As the studies of Regionomica have shown, Hamburg has to use this potential for commercial purposes to bring the metropolitan region as a logistics location to the fore. New settlements of logistics and IT companies have a direct effect on employment which in turn boosts the region's economy and thus its strong position in competition. According to Regionomica, the creation of 18,000 additional jobs in the logistics and IT branch will be possible until 2015. Furthermore, a master plan regarding logistics areas has been prepared with the help of the Logistics Initiative of Hamburg which includes the development of logistics areas until 2015.

To put it in a nut shell, still many business people consider Hamburg as a mere commercial location. As this analysis has shown, the Hamburg Metropolitan region in general and the southern metropolitan region in particular has a strong potential regarding sites, infrastructure, manpower and know how suitable for logistics and IT companies (see Appendix 3). With its manifold institutions supporting relevant development measures such as the Süderelbe AG and the existing networks of competence, the region definitely is one of the rapidly growing ones in Germany.

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## APPENDIX

### Appendix 1 Logical framework and analysis

#### I. Creation of a “Logistics Cluster” by the Wachstumsinitiative Süderelbe AG by means of a dedicated cluster management

The project was initiated in midst 2005 and is still in its first phase. The main elements are presented in the framework below.

Attribute	Indicators	Information Sources	Preconditions, external factors
<p><b>Overall objective:</b> Achieve sustainable economic growth in southern Hamburg metropolitan region by forming networks and accomplishing project-oriented cooperation between companies, service providers, academic institutions and authorities.</p>	<p>SMEs from the southern Hamburg metropolitan region operating in the logistics sector.</p>	<p>Figures and statistics from authorities, local Chambers of Commerce &amp; regional business development corporations.</p>	<p>Identify the current situation and possibilities for SMEs to participate in corporate projects.</p>
<p><b>Purpose:</b> Create a platform for information exchange, know how transfer and the implementation of concrete cooperation projects between different regional players.</p>	<p>Increased involvement of regional SMEs in corporate business projects.</p>	<p>Project records.</p>	<p>Reaching SMEs and making them see the benefits of project oriented cooperation.</p>

<p><b>Output:</b> The SMEs will have clear information on cooperation possibilities and suitable business partners; they will get the chance to improve their performance and develop innovations in the course of project work.</p>	<p>Benefits for the SMEs are: stimulation and facilitation of innovation, development of new products and services through resource-efficient team-work; cost cuttings.</p>	<p>Project records</p>	<p>Find out the respective competencies and needs of regional SMEs; bringing together of complementary partners.</p>
<p><b>Inputs/ Activities:</b> SMEs are offered consultancy and management services. SAG's cluster management will find out SME's development objectives, map out and manage projects and provide contacts to other players like authorities or research institutions.</p>	<p>Potential number of relevant enterprises from logistics, industry and trade is around 3,000; overall budget of cluster management amounts to 0.5 mill Euro.</p>	<p>Project records.</p>	<p>Willingness for cooperation is essential; attitudes towards cooperation in a rather competitive setting will have an effect.</p>

**Relevancy:** This measure fits one of the strengths' of the region, logistics, and is relevant in the context of the development of a logistics cluster in the southern metropolitan region of Hamburg. Regional SMEs have a tendency to focus on themselves and a rather limited knowledge of the possibilities and benefits of project oriented team work within networks.

**Impact:** Meeting the purpose of the measure would mean that SMEs in the southern metropolitan region of Hamburg would make more use of networks in their everyday businesses. Problems relating to lack of know how or resources could be reduced in corporate projects. SMEs will benefit from SAG's project management as well as make use of



complementary services and products from other companies in the region, so that all participants will benefit.

**Effectiveness:** Once the companies know about an existing network they can profit from, the Wachstumsinitiative Süderelbe AG will provide them with contact addresses, news from the region and about ongoing projects as well as information on regular events to make the companies get to know each other better.

**Efficiency:** Very efficient for participating companies and the competitiveness of the region.

**Sustainability:** Remains to be seen.

## II. Future Logistics - Technological Innovation in the Logistics / Logistics and ICT-related measures initiated by the Logistics Initiative Hamburg

The project was initiated in 2006 in cooperation with the Senate of the City of Hamburg: Built up of a research group called "Future Logistics - Technological Innovation in the Logistics" the responsible parties are the Logistics Initiative Hamburg and Hamburg@work. The main elements are presented in the framework below.

Attribute	Indicators	Information Sources	Preconditions, external factors
<p><b>Overall objective:</b> Support companies with innovative ideas, create and implement new ICT solutions for the logistics branch.</p>	<p>Regional SMEs developing their business with ICT.</p>	<p>Sources of Logistics Initiative Hamburg and research group records.</p>	<p>Identify relevant ICT projects which can help SMEs to adapt to current market requirements and optimise their performance.</p>
<p><b>Purpose:</b> Create a dedicated think tank where innovative ICT solutions are presented and discussed; create an application-oriented research platform for</p>	<p>Increased ICT usage in SMEs.</p>	<p>Research group records.</p>	<p>Companies must necessarily have an interest in innovative ICT concepts and the willingness to</p>

SMEs operating in the logistics sector.			exchange branch know how and business experience.
<b>Output:</b> Participating SMEs will get a clear notion of their ICT weak points, potential of improvement and concrete ways of implementation	Benefits for SMEs: e.g. time savings, cost cuttings, improved overall performance of business.	Research group records.	Find out the ICT deficiencies and needs of SMEs; Bringing together of suitable partners from the logistics and the ICT sector.
<b>Inputs/ Activities:</b> SMEs are offered a neutral platform where ICT experts inform about and advise on the latest ICT trends in logistics. Application-oriented ICT research is done in the regularly held workshops of the research group.	The current number of companies involved in the research group is approx. 30; there is no extra budget for the research group. It is part of the total budget of the Logistics Initiative Hamburg.	Research group records. Activities are managed by Hamburg School of Logistics.	Development of suitable strategies for the transfer of research done into business practise.

**Relevancy:** This development fits one of the focuses of the region, logistics, and is relevant in the context of the logistics sector in the whole metropolitan region of Hamburg. SMEs in the metropolitan region of Hamburg still have ICT deficiencies and can likely improve their business performance with an increased ICT usage.

**Impact:** Meeting the purpose of the measure would mean that SMEs in the metropolitan region of Hamburg would make more use of ICT in their everyday businesses, thereby adapting to market requirements. The research group “Future Logistics” will provide first hand ICT know

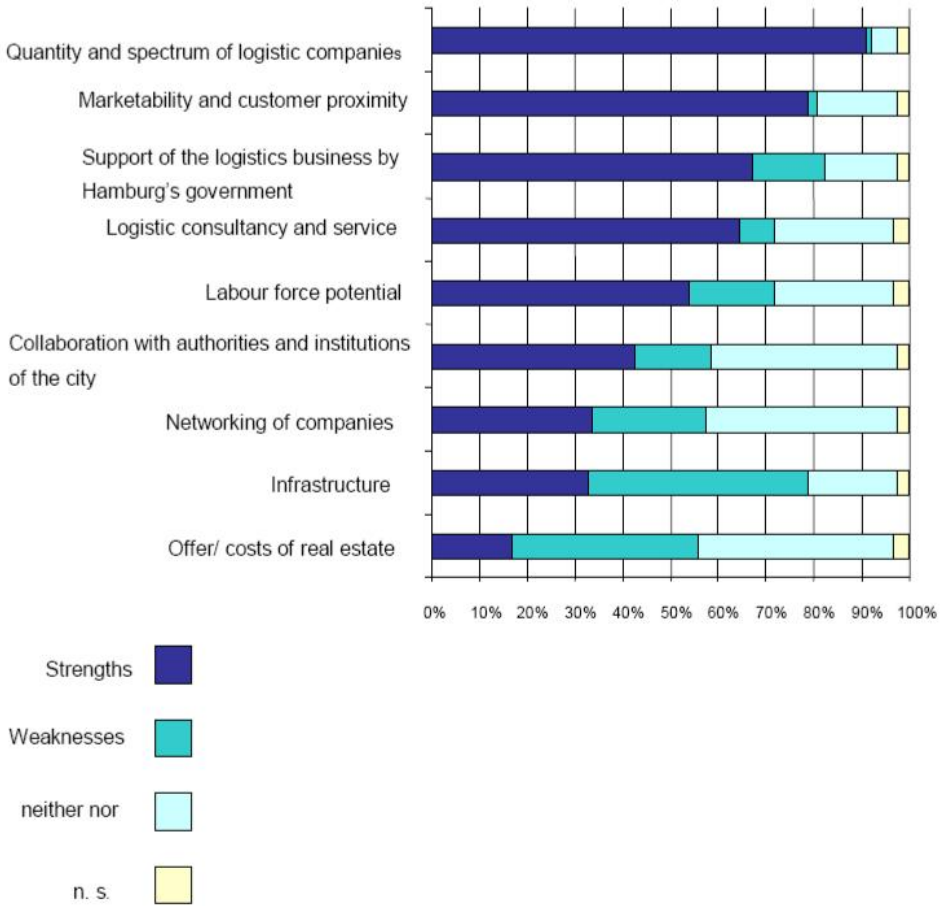
how. This would mean innovation trends would be communicated early to participating companies. Potentially the efficiency of the companies will increase leading to an improved economic situation of the companies thanks to innovation.

**Effectiveness:** Participating companies will gain knowledge of their ICT deficiencies, potentials and market trends and will get recommendations how to improve their individual situation.

**Efficiency:** SMEs will profit from concrete advice and the direct participation in the research process.

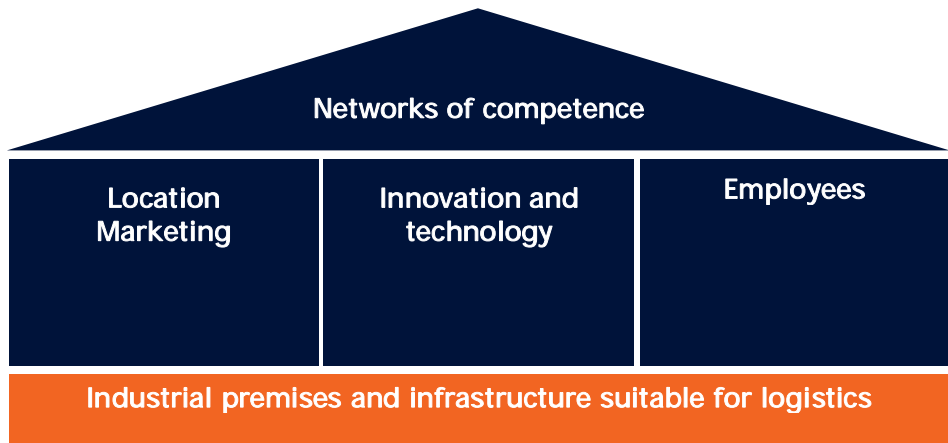
**Sustainability:** Remains to be seen, heavily depends on suitable strategies of implementation.

Appendix 2 The results of the questionnaire regarding Hamburg's strengths and weaknesses as a logistics location prepared by the Logistics Initiative Hamburg in 2006



Strengths and weaknesses of Hamburg as a logistics location

## Appendix 3 The “house of logistics”





**LogOn Baltic Publications** (as of 16.11.2007)LogOn Baltic Master reports

- 1:2007 Developing Regions through Spatial Planning and Logistics & ICT competence - Final report  
Wolfgang Kersten, Mareike Böger, Meike Schröder and Carolin Singer
- 2:2007 Analytical Framework for the LogOn Baltic Project  
Eric Kron, Gunnar Prause and Anatoli Beifert
- 3:2007 Aggregated logistics survey report (*working title*)  
Håkan Aronsson and Naveen Kumar
- 4:2007 Aggregated ICT survey report (*working title*)  
Eric Kron and Gunnar Prause
- 5:2007 Aggregated Expert interview report (*working title*)  
Matti Takalokastari

LogOn Baltic Regional reports**Development Measure Impact Analysis (DEMIA)**

- 10:2007 REGIONAL DEVELOPMENT IN THE SOUTHERN METROPOLITAN REGION OF HAMBURG, GERMANY - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Janina Benecke, Jürgen Glaser and Rupert Seuthe
- 11:2007 REGIONAL DEVELOPMENT IN MECKLENBURG-VORPOMMERN, GERMANY - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Gertraud Klinkenberg
- 12:2007 REGIONAL DEVELOPMENT IN ESTONIA - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Jaak Kliimask
- 13:2007 REGIONAL DEVELOPMENT IN SOUTHWEST FINLAND - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Kaisa Alapartanen
- 14:2007 REGIONAL DEVELOPMENT IN LATVIA - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Riga City Council - Rode & Weiland Ltd.
- 15:2007 N/A
- 16:2007 REGIONAL DEVELOPMENT IN POMERANIA, POLAND (THE POMORSKIE VOIVODESHIP) - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Anna Trzuskawska
- 17:2007 REGIONAL DEVELOPMENT IN SAINT PETERSBURG, RUSSIA - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Mikhail Pimonenko
- 18:2007 REGIONAL DEVELOPMENT IN ÖSTERGÖTLAND, SWEDEN - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
Håkan Aronsson and Staffan Eklind

**ICT surveys**

- 20:2007 ICT SURVEY IN THE SOUTHERN METROPOLITAN REGION OF HAMBURG, GERMANY  
Wolfgang Kersten, Meike Schröder, Mareike Böger, Carolin Singer and Tomi Solakivi
- 21:2007 ICT SURVEY IN MECKLENBURG-VORPOMMERN, GERMANY  
Eric Kron, Gunnar Prause and Tomi Solakivi
- 22:2007 ICT SURVEY IN ESTONIA  
Seren Eilmann and Tomi Solakivi
- 23:2007 ICT SURVEY IN LATVIA  
Riga City Council, Telematics and Logistics Institute Ltd. and Tomi Solakivi
- 24:2007 ICT SURVEY IN LITHUANIA  
NN and Tomi Solakivi

- 25:2007 ICT SURVEY IN SOUTHWEST FINLAND  
Juha Lääkkö and Tomi Solakivi
- 26:2007 ICT SURVEY IN POLAND  
Anna Trzuskawska and Tomi Solakivi
- 27:2007 ICT SURVEY IN SAINT PETERSBURG, RUSSIA  
Yuri Ardatov and Tomi Solakivi
- 28:2007 ICT SURVEY IN ÖSTERGOTLAND, SWEDEN  
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#### **Logistics surveys**

- 30:2007 LOGISTICS SURVEY IN THE SOUTHERN METROPOLITAN REGION OF HAMBURG, GERMANY  
Wolfgang Kersten, Mareike Böger, Meike Schröder, Carolin Singer and Tomi Solakivi
- 31:2007 LOGISTICS SURVEY IN MECKLENBURG-VORPOMMERN, GERMANY  
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- 32:2007 LOGISTICS SURVEY IN ESTONIA  
Ain Kiisler and Tomi Solakivi
- 33:2007 LOGISTICS SURVEY IN LATVIA  
Riga City Council, Telematics and Logistics Institute Ltd. and Tomi Solakivi
- 34:2007 LOGISTICS SURVEY IN LITHUANIA  
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- 35:2007 LOGISTICS SURVEY IN SOUTHWEST FINLAND  
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- 40:2007 EXPERT INTERVIEWS IN THE SOUTHERN METROPOLITAN REGION OF HAMBURG, GERMANY - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
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Matti Takalokastari, Matias Suhonen, Petri Murto and Hilja-Maria Happonen
- 44:2007 EXPERT INTERVIEWS IN LATVIA - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
Riga City Council and Rode & Weiland Ltd.
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