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**EXPERT INTERVIEWS IN
MECKLENBURG-VORPOMMERN,
GERMANY -**

**Results and analysis of the
intersectoral expert interviews in
the field of logistics and ICT**

**Gunnar Prause,
Margitta Rudat,
Gertraud Klinkenberg and
Eric Kron**



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EXECUTIVE SUMMARY

The main purpose of the Expert Interviews is to produce a qualitative approach on the needs and future visions concerning logistics and ICT in Mecklenburg-Vorpommern. This is achieved by gathering opinions and recommendations of experts representing the public and private sector.

The interview is divided in five parts, covering following areas of interest:

- Trends in logistics and ICT
- Business connections in the Baltic Sea Region
- Regional development
- Education and competences in the region
- Future expectations

Despite of the existing fast connections and a relatively high technology, the experts think there is still plenty of space to grow. As an example they mentioned the existing DSL networks and connections.

In the field of logistics there are several more issues to tackle. The most important of them is probably the development of a regional strategy, which will help solve several of the other problems directly depending from this one.

This report consists of four sections; **Section 1** gives a short introduction to the LogOn Baltic project, the regional partners, and the Expert Interview.

Section 2 delineates the characteristics of the target group of the interviews, and mentions the main topics covered in the interview.

The experts' opinions and recommendations regarding the regional strengths and weaknesses with respect to logistics and ICT are presented in **Section 3**. This section concludes with the interpretation of the obtained results.

Section 4 summarizes the main ideas from the experts.

EXECUTIVE SUMMARY

Das Hauptziel der Experten Interviews ist die Bestimmung der Bedürfnisse und Zukunftsaussichten bezüglich der Logistik und den Informations- und Kommunikationstechnologien (IKT) in Mecklenburg-Vorpommern mittels eines qualitativen Ansatzes. Dies wird dadurch erzielt, dass die Meinungen, Empfehlungen und Erwartungen von Experten aus dem öffentlichen und privaten Sektors erfasst und ausgewertet werden.

Ein Interview besteht aus fünf Teilen und beschäftigt sich mit folgenden Themenkomplexen:

- Tendenzen in Logistik und in IKT
- Geschäftsverbindungen in der Ostsee-Region
- Regionale Entwicklung
- Ausbildung und Kompetenzen in der Region
- Zukünftige Erwartungen

Trotz der vorhandenen schnellen Internetanschlüsse und der verhältnismäßig guten Technologiestand in der Region, glauben die Experten, dass es weiterhin einen hohen Wachstums- und Weiterentwicklungsbedarf gibt. Als Beispiel nannten sie die Verbesserung der existierenden DSL-Anschlüsse.

Im Bereich Logistik, gilt es mehr Handlungsbedarf als im IKT-Bereich. Als wichtigster Punkt wird die Entwicklung einer regionalen Logistikstrategie genannt, die dann dazu beitragen wird weitere regionale Logistikprobleme mit zu lösen.

Dieser Bericht besteht aus vier Abschnitten; in **Abschnitt 1** werden das LogOn Baltic Projekt, die regionalen Partnern und die Experten Interviews kurz beschrieben.

Abschnitt 2 stellt die Eigenschaften der Zielgruppe dar und erwähnt die Hauptthemen, die im Interview angesprochen wurden.

Die Meinungen und Empfehlungen der Experten in Bezug auf regionalen Stärken und Schwächen hinsichtlich der Logistik und IKT werden in **Abschnitt 3** dargestellt. Dieser Abschnitt endet mit einer Auswertung der erhaltenen Ergebnisse.

Abschnitt 4 fasst die Hauptideen der Experten zusammen.

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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.

1.2 Regional partner introduction

Mecklenburg-Vorpommern is Germany's gateway to the Baltic countries and to Scandinavia. With the eastward enlargement of the EU, the state has become even more the centre of Europe.

The German partners representing the region of Mecklenburg-Vorpommern in this project are the Business Association of Wismar (Wismarer Wirtschaftsgemeinschaft), the Federal Association of SMEs (Bundesverband mittelständische Wirtschaft), the Ministry for Labour, Building and Regional Development Mecklenburg-Vorpommern (Ministerium für Arbeit, Bau und Landesentwicklung MV), and the Wismar University (Hochschule Wismar).

The **Business Association of Wismar (WWG)** is a non-profit organisation, and represents more than 250 members of different branches in the region. The Association promotes the economic and professional interests of its members, particularly in:

- Keeping the appropriate authority informed about problems, concerns and wishes of the members;
- Advising and supporting the legislative statutory corporation in Federation, county and local authority in elaborating and

preparing appropriate legislative projects and any form of legal regulation;

- Cultivating relations, as well as exchanging information and ideas with other economic societies, to give them support on demand and attend the interest of their members if necessary;
- Supporting its members in professional concerns, in economic, legal and technical respects, especially by informative meetings etc;
- Strengthening the economic region of Wismar by different measures and actions.

As a partner in some national projects in the field of maritime and wood related logistics and ICT, WWG will mainly contribute to the empiric part of the project covering the Mecklenburg area. The partner will furthermore integrate its experience and its economic expertise in logistics and ICT by developing concepts and action plans for the regional development based on the project results.

With these activities the Business Association aims at strengthening the economic position of the enterprises in Wismar, making them more competitive at an international level.

The **Federal Association of SMEs (BVMW)** is the biggest German association of enterprises with sections all over Germany. The participating section represents enterprises in Hamburg, Schleswig-Holstein and Mecklenburg-Vorpommern. The partner will contribute a representative picture of the logistical and related ICT needs of their enterprises and will guarantee the full coverage of the empiric results of the project. The experience and the economic expertise of the partner will safeguard the development of applicable new concepts & action plans for the regional development based on the project results.

The **Ministry for Labour, Building and Regional Development Mecklenburg-Vorpommern** has a wide experience as a partner as well as a lead partner in several Interreg, Phare and TACIS projects focused on regional development and spatial planning; e.g. SuPortNet. The Ministry has been one of the driving forces behind the VASAB cooperation. Experience from the role as a spatial planning authority in M-V and from spatial planning cooperation in BSR will contribute to the project, safeguarding project's direction towards applicable results for daily practice in spatial planning and regional development around the BSR.

The **University of Wismar** stands on the educational pillars of technology, business and design. The university also organizes

scientific conferences, which serve as a meeting point for specialists from all over. A constant exchange of students and professors has been the norm for years. Partnerships and cooperation agreements exist with universities across the globe.

As an experienced partner in national and international projects, the Business Department of the university has been taking part in research projects focused mainly on entrepreneurship, development and internationalization of SMEs, maritime logistics and regional development (e.g. Baltic Business Development Network, InterBaltic).

1.3 Expert interview introduction

Some of the main methodologies used within the LogOn Baltic project are expert interviews and empirical web-based surveys based on a large number of respondents. While the surveys mainly focus on the current status and needs of the logistics community and allow for a quantitative analysis, the expert interviews mainly follow a qualitative approach. The aim is to investigate regional strengths and weaknesses with respect to logistics and ICT. Nevertheless, expectations and future visions of different kinds of institutions and companies are to be determined as well.

The willingness to answer questions in a greater depth and in an open discussion can only be achieved by personal and individual conversations with selected interview partners. Furthermore, it is not only the aim to analyse the current situation but also the background and causes which lead to this situation as well as to give recommendations and to determine future trends of regional development. Thus, the complexity and multifariousness of the research questions require personal interviews and a qualitative approach. With ten to fifteen interviews it is possible to cover the major views on regional development regarding logistics and ICT.

The expert interviews will play an important role in the stage of the project when it comes to the development of a comparative report on the Baltic Sea Region (BSR). Since expert meetings will take place in all participating regions around the Baltic Sea, best practices and recommendations will be deduced for the regional decision makers.

2 INTERVIEW DESIGN

2.1 Target group and sample

The objective was to choose a heterogeneous target group, in order to guarantee for an analysis from as many perspectives as possible. In each region, ten to fifteen interview partners were selected, representing seven different institution or company groups. Another aspect in selecting the companies or institutions was the possibility to contact potential interview partners on a higher management level. Through this it could be assured that the interview partners had the willingness to answer the questions and had a good overview of the development of the industry in the region.

The private sector is represented by four different company groups: The manufacturing industry, the retail industry, logistics service providers and logistics consultants. The latter two were chosen because their employees normally have experience with a lot of different clients and/or projects.

The public sector is mainly represented by the local authorities who are responsible for regional development. Support initiatives may either belong to the private or the public sector or are public-private-partnership. Both institutional groups have experience in initiating, financing and executing regional development activities. Last, representatives from research institutions complete the target group by an independent and research-oriented perspective. The following figure shows the target groups distinguished by the public and private sector.

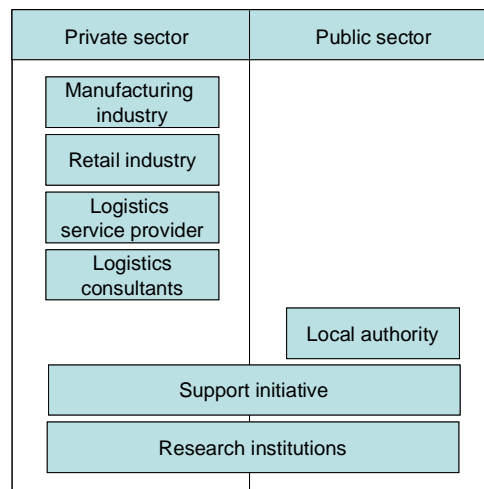


Figure 1 Target groups of the expert interviews by public and private sector

For the Mecklenburg-Vorpommern region, the distribution of the interview partners can be withdrawn from the following table:

Table 1 Chosen experts for the interviews

Group	Name of company/institution	Interview partner
Support initiative	Verband Spedition und Logistik MV	Head of administrative office
	Wismarer Wirtschaftsgemeinschaft e.V.	Head of cluster development
	IHK Schwerin	
	Bundesverband mittelständische Wirtschaft (Federal Association of SMEs)	Managing Director
Logistics service provider	Sea port of Wismar	Marketing & Sales
	UPM – Kymmene Sales GmbH	Director Logistics Network CE
Retail industry	Karstadt AG, Filiale Wismar	branch manager
Local authority	Ministerium für Verkehr, Bau und Landesentwicklung	Regional Planning
	Hochschule Wismar	university lecturer
	Hafen-Entwicklungsgesellschaft Rostock mbH	Mitarbeiter Strategische Entwicklung/Grundsatzfragen
Research institution	SST GmbH	General Manager
Logistics consultant	Baltic Marine Consult	Managing Director

2.2 Main topics covered in the interview

The interviews were conducted according to a half-standardized interview guideline. Most questions were open end questions. A quantitative scale was used in addition to qualitative answers, when it seemed useful for a later comparison of the interviews.

The interview guideline comprises five major parts. The first part covers general trends regarding logistics and ICT. The second part deals with current and planned business contacts in the BSR. Furthermore, barriers and problems of doing business in the BSR are discussed. Part three analyzes regional development measures. Starting from key issues and from the evaluation of regional development activities, the strengths and weaknesses of the region, the competence level with respect to logistics and ICT and proposals for improvements are examined. Part four addresses the qualification level in logistics and ICT as well as future needs for education. The guideline finishes with expectations, wishes and concrete recommendations of the interview partners.

3 FINDINGS FROM THE INTERVIEWS CONDUCTED

The structure of this chapter follows the structure of the interview guideline. Therefore, sections 3.1 to 3.5 refer to the five parts of the guideline. Section 3.6 summarizes and interprets the most important results.

3.1 Findings regarding trends in logistics and ICT

3.1.1 Trends in logistics

In the past decades, the basic concept for international trade has suffered profound changes affecting directly the flows of goods. These changes have led to the opening of new markets and the expansion of existing markets around the world, increasing the variety and volume of transported goods.

The following trends mentioned by the experts in Mecklenburg-Vorpommern are primarily influenced by global, national, and local factors.

Among the top issues mentioned by the experts concerning the logistics agenda of Mecklenburg-Vorpommern for the next years is the low industrial density in the region. After the EU-enlargement of 2004, many industries have migrated towards Eastern, South-Eastern Europe, in search of lower costs that will make them more competitive in the global market. As a consequence of this, and already with the reunification of Germany, many people left Eastern Germany seeking for better job possibilities in Western Germany. This massive exodus has had a strong impact on the quality of the remaining workforce; it is difficult to find qualified workers in the area of logistics at present.

From the experts' point of view, the lack of a logistics strategy for Mecklenburg-Vorpommern is a decisive weakness at the moment of considering the establishment of a business in the region. The

perception is that of the lack of a logistical integration of the different locations.

Related to the costs, the increasing fuel prices have contributed in a great measure to the high transport costs in the region.

To keep up with the increasing volumes of goods transported around the BSR, the infrastructure at the different seaports is being constantly adapted to this situation; in Wismar, they are planning the extension and deepening of the navigation channel for overseas traffic.

The North-South highway-connection A20-A14 will provide a more direct access to the southern metropolis.

A poor degree of internationalization (language skills and international orientation of local companies) is also an important issue that is worrying the experts.

A bigger offer of logistic-related careers and a bigger variety of cultural as well as dwelling conditions are some areas that have to be improved in order to attract qualified workers in the field of logistics to Mecklenburg-Vorpommern.

Ferry connections with other ports around the BSR are very well developed. It was mentioned that the connection to Ust-Luga – in Russia – is going to have an important impact on the economy of the region.

Traffic safety regulations at an EU-level should be implemented uniformly.

Although the experts mentioned the local authorities' openness regarding logistics concerns, their competences in the field of logistics were considered very poor compared to other regions in the BSR and to South Germany.

3.1.2 Trends in ICT

From the experts' point of view, the regional strengths of the ICT lie in the existing infrastructure.

An improvement of the networks and the DSL-connections for the State are required, laying emphasis on the extensive coverage of quick Internet connections. In particular, the lack of DSL-connections in many parts of the State should be solved in the short term through higher investments.

The State does not have a developed ICT-cluster with effective cluster structures like in other regions of the Baltic Sea, neither are the IT-actors effectively connected.

The local IT companies dispose of services focused specifically on the demand of the region, hindering the access to other markets.

3.2 Findings regarding business connections in the Baltic Sea Region

3.2.1 Current business contacts and projects in the BSR

Following table shows the approximate amount of business contacts the companies the experts belong to, have in the BSR.

Table 2 Number of business contacts in the BSR¹

Number of contact	0-5	6-15	16-25	>25
Federal Republic of Germany				
Poland and Baltic States (Lithuania, Latvia, Estonia)	5	2		
Russia	6			
Scandinavia (Denmark, Sweden, Finland, Norway)	5	1		2

The entire Baltic Sea Region – except Russia – belongs to the European Union since the enlargement of 2004. The socio-economic environment in the BSR is characterized by important economic and social differences, cultural barriers, different languages and differing corporate structures. Especially SMEs have difficulties to fully exploit the advantages of the new EU-market.

At present, local companies, authorities and other organisations have only few contacts in the BSR. The few existing contacts are mainly with customers within the region. Scandinavia has a dominant position in the actual contacts as a result of the close connection of the seaports of Wismar and Rostock with ports in Scandinavia and Finland.

The joint work in EU-Programs – like for example INTERREG III B projects - was mentioned as a distinctive feature, which have proved to be very positive for establishing new contacts in the BSR. Town twinning also helped a lot to establish new contacts overseas. As

¹ Each number represents the amount of experts choosing the corresponding option.

example of this is the active relationship between Wismar - Kalmar, and Wismar - Aalborg.

3.2.2 Planned business contacts and projects in the BSR

Considering the planned contacts and activities in the BSR, the experts assume that the existing contacts can be developed and that the collaboration in international projects will increase.

According to Table 2, several experts could only mention up to two planned logistics projects for the near future.

Table 3 Number of logistics projects

Number of logistics projects	0-2	3-5	6-10	>10
	6	1		

Cross-national projects involve countries like Russia, the Baltic States, Poland, and Scandinavia. Concrete projects mentioned were:

- Navigation to and from Finland within the framework of the project "Motorways of the Sea".
- Economic Days (together with the German-Swedish Chamber of Commerce)

Table 4 Number of cross-national projects

Number of cross-national projects	0-2	3-5	6-10	>10
	5			

3.2.3 Constraints and problems of co-operation in the BSR

Surprisingly, one expert asserted that no problem appeared so far for the institution he was representing.

Almost all of the other experts mentioned the language barriers to be the most important one. The English skills often don't help much to clarify complex connections. In many cases the specialist only speaks the local language.

In general, the employees' qualifications and technical understanding problems were also mentioned.

The structure of the German administration is seen as another obstacle to the cooperation with other European partners, due to the fragmented competences.

The differing tariff regulations of the different countries constitute a particular administrative topic for international logistics. Related to this, the fact that every country – in particular Eastern European countries, although they already belonged to the EU - has its particularities concerning certification, documentation or verification was considered as an important obstacle. The particularities for each country are summarized as follows:

Poland

- Differing concept of Management
- Port activities are charged in USD
- General mistrust against opening of the market

Russia

- Disputes with Baltic States (especially with the Baltic ports) related with price increases
- Freight traffic Finland-Russia: premium goods are transported over Finland because it is safer
- Insecure business- and general conditions
- Often, lack of international experience
- Money is concentrated in very few Russian hands, who are only interested in bigger investment opportunities, which usually are not available in Mecklenburg-Vorpommern
- Cheating and adulteration

Scandinavia

- Privilege local suppliers → high access barriers to these countries (exception Finland)

3.3 Findings regarding regional developments

3.3.1 Known regional development activities

Almost all of the interviewed experts had knowledge of some type of development activities going on in the region. Among INTERREG III B projects, some of the mentioned projects were LogOn Baltic, InterBaltic

and Baltic Gateway. At a local level, the experts mentioned various development activities carried out by the Regional Planning Association.

3.3.2 Key regional development issues

A frequently mentioned topic in the area of infrastructure concerns the planned Fehmarn-Belt-Crossing. Most of the experts assume that with the Belt-Crossing, regional as well as supraregional impacts should be expected. The experts from Rostock saw the impacts of the Belt-Crossing much more negative than the experts from Wismar and Schwerin.

In connection with the road network, the construction of the Rügen-bridge should be connected with an extension and improvement of the B96 to Sassnitz. Further urgent projects that were mentioned concerning the road infrastructure is the extension and improvement of the A14 and the A241, as well as the B190 and B189.

The experts also demanded a strategic support of the airports in the region.

Another controversial topic of discussion was the development of the local transport in Mecklenburg-Vorpommern, as a consequence of the demographic changes.

The experts from Rostock pleaded for further development of the railway in the seaport of Rostock. As a result of the increasing railway cargo volumes – with a current growth rate of 15 percent and an expected 40 percent growth rate in the future – experts anticipate cargo handling problems in the Port of Rostock. The increase of the railway-tonnage is a result from the lack of truck-space, expecting in this sense a future shortage of wagons.

The ferry service is considered important for the ports in the region. The location of Mecklenburg-Vorpommern on the Baltic Sea - and especially the seaports - is considered an important location advantage of the State, demanding further support for the seaports. In order to maintain competitiveness, the seaport of Wismar needs to undergo urgently an extension and deepening of the navigation channel. The creation of a national / international center for improvement of ship security in the BS was encouraged as a secondary measure to support the local maritime traffic. Parallel to this, an integration of maritime research and development in the State.

The experts asked for a better cooperation among the institutions operating in the interface between logistics and regional development. In this connection, a better coordination of the Planning Associations' tasks and the activities of the economic promotion were mentioned. There was total agreement on the fact that regional development - from a logistical point of view – is significantly influenced by the availability of space at traffic hubs, and the availability of qualified manpower.

3.3.3 Successful regional development projects

Table 5 Number of successful regional development projects

Number of successful regional development projects	<25%	25-50%	51-75%	>75%
		1	3	3

All of the experts certified the so far undertaken logistics-oriented development projects in Mecklenburg-Vorpommern with a high success rate. Following projects were considered successful:

- Construction and modernization of the railway tracks in the Seaport of Rostock
- Modernization of all ports in Mecklenburg-Vorpommern
- Road connection to the Seaport of Rostock
- Infrastructure in the Seaport of Rostock
- The Warnow-tunnel
- Almost complete implementation of the infrastructure projects of the Plan for Federal Traffic Routes (Bundesverkehrswegeplans)
- Industrial parks along the A20 and A24
 - MEGA Park Valluhn / Gallin (Logistic Center)
 - Industrial Park Lübstorf
 - Industrial Park Selmsdorf
 - Industrial Park Hornstorf
- Industrial settlement in Wismar / Haffeld (Wood-Cluster) including North-East feeders
- Infrastructure in the Old Harbour (Wismar)
- Conversion of the Parchim Airport into an international hub for air cargo

3.3.4 Strengths and weaknesses of the regions in Logistics

The geographical location of Mecklenburg-Vorpommern in general speaks for the region as a logistical location factor, with good opportunities for the maritime traffic in the North-Eastern part of the Baltic Sea. The region offers for the road transport options for further development as a gateway to Central Europe.

The well developed road and rail connections together with the port infrastructure were considered the regions' strength regarding logistics infrastructure. A special mention goes to the good hinterland-connections of the seaports of Wismar and Rostock; the railway connection and the good accession to the A20, A14 and A24 motorways are considered advantageous for the Seaport of Wismar.

The low labor costs and the availability of wide extensions to settle a company – or even an industrial park – are seen as positive, since these same issues are usually a bottleneck in other regions.

The outskirts location of the region, relatively far from densely populated cities such as Berlin or Hamburg, was considered as a weakness of the region.

With the reunification of Germany, many people left Eastern Germany seeking for better job possibilities in Western Germany. This massive exodus has originated a shortage of qualified workforce, and the experts believe this situation will increase dramatically in the future. Many chances in logistics can't be handled – especially regarding Russia – because there are hardly any logistics experts in the region (there are mostly in Hamburg).

The poor diversification of industrial products is a consequence of the low industrial density and the simpleness of the industrial structure, dominated by the agricultural goods, wood, and commodities. But on the other hand, the strong role of agriculture in the region offers a good chance for specialized product development in the area of logistics.

Unfortunately only a few clusters have developed in the region due to the weak economic structure.

The experts also regretted the fact that logistics is not given the necessary importance at the universities in the region; logistic-related careers are not so easy to find in this region.

Bureaucratic procedures and overregulated administrative regulations in Germany were mentioned to be further weaknesses for the development of logistics in Mecklenburg-Vorpommern.

3.3.5 Strengths and weaknesses of the regions in ICT

The regional strengths of the ICT lie – from the experts' point of view – in the existing infrastructure.

The missing integration of networks and the lack of extensive DSL-connections were considered weaknesses in the State, despite the good ICT infrastructure.

The State does not have a developed ICT-cluster with effective cluster structures like in other regions of the Baltic Sea, neither are the IT-actors effectively connected.

The local IT companies dispose of IT-services focused specifically on the demand in MV, hindering partially the access to supraregional markets.

3.3.6 The logistics competence level

Table 6 Logistics competence level of different actors

	very low	questionable	acceptable	High	very high
of your company/ institution in comparison to leading companies in your branch?		1	4	1	4
of your region in comparison to other regions in the Baltic Sea Region		1	5	3	3
of the local authorities in the region?	2	2	4	2	
of the support agencies in the region?	1		3	1	1

Although the experts mentioned the local authorities' openness regarding logistics concerns, their competences in the field of logistics were considered very poor compared to other regions in the BSR and to South Germany.

When it comes to evaluating the logistics competences of the employees or the staff where the experts worked, the rating of these

competences was rather 'acceptable' towards 'high'. But when it came to evaluate the logistics competences of local authorities, the rating fell a little.

3.3.7 Participation of the interviewed companies in logistics support agencies, networks or initiatives

One of the interviewed experts representing a logistics service provider said that the company he represents formed regional networks. One of the local authorities is participating in the State Association of Port Economy. The Chamber of Commerce in Schwerin is helping launch the 'Logistics Initiative Westmecklenburg', together with some companies and other institutions.

Research institutions are participating in Joint Research Networks.

3.3.8 Assessment of local authorities' support and policy concerning logistics issues

Table 7 Level of satisfaction concerning local authorities' support and policies regarding logistics

very unsatisfied	rather unsatisfied	neither unsatisfied nor satisfied	Satisfied	fully satisfied
1	2	4	3	

Comparing the results obtained in Table 6 with the experts' opinions about the local authorities competences in the field of logistics, it is no surprise to see a rather average rating of the support policies concerning logistics. Only three experts were satisfied. Nearly half of the experts who answered this question were impressed either in a positive or in a negative way by the policies. But three were unsatisfied, whereas one of the associations was very unsatisfied, because most of the policies depend from Hamburg.

3.3.9 Assessment of local authorities' support and policy concerning ICT issues

Table 8 Level of satisfaction concerning local authorities' support and policies regarding ICT

Very unsatisfied	rather unsatisfied	neither unsatisfied nor satisfied	Satisfied	fully satisfied
2			2	

Concerning the ICT policies, opinions were split. From the four experts who answered to this question, two were very unsatisfied, while the other two were satisfied. The latter, mainly because they believed the authorities have done a good job regarding the ICT infrastructure in the region.

3.3.10 Proposals for improvement

The experts were also asked to list possible situations in everyday life where improvements can be done, and suggest proposals that would benefit their company / institution. In this sense, following are some of those proposals:

- Flexible opening times for stores
- Better online offers
- Develop a logistics strategy for the region, representing as many interests as possible
- Increase education offers related to logistics
- Stronger standardisation of particular processes
- Harmonize logistics regulations at an EU-level
- Eliminate some bureaucratic costs
- Promote and develop competences at higher levels
- Create a logistics initiative for the region
- Develop and promote policies for the regional airports
- Develop and promote premises around the ports, to favour the settlement of companies
- Development of business relations with Russia

Regarding this last point, it is necessary to detect the regional key players together with their products and potential customers in Germany or Central Europe to be able to develop and prepare logistical offers in Mecklenburg-Vorpommern. The experts suggested not concentrating the efforts only on Russia. The logistic sector in the region should be oriented strategically to become a “Gateway to Central Europe” and focus on “Short-Sea-Shipping”.

3.3.11 Roles and responsibilities in regional development

Several experts agreed on this point, that the policy to decide future development measures should follow a ‘bottom-up’ strategy, where key actors of the local economy (companies and associations) take the lead, and determine the needs of the region, and then inform the political decision-making level, so they can transform the existing needs into policies, in order to promote the economic development of the region.

From the researchers’ side, a Public-Private-Partnership (PPP) should function only as an engine.

3.4 Findings regarding education and skills in the regions

3.4.1 Qualification level in logistics

Table 9 Logistics qualifications of own employees

	In the company				
	very low	rather low	Acceptable	high	very high
blue-collar worker		2	1	4	1
White-collar worker			3	5	1
management			2	2	3

A big majority of the experts rated the logistics qualifications of the own workers / co-workers ‘acceptable’ or better, at all three levels of

the enterprise: blue-collar workers, white-collar workers, and management. Only in two cases, the experts thought that the qualification level of the blue-collar workers was rather low.

Table 10 General logistics qualifications in the region

In the region					
	very low	Rather low	acceptable	high	very high
blue-collar worker		2	3	2	
White-collar worker			5	2	
management			4	3	

Here again, a big majority of the experts rated the logistics qualifications in the region in general as 'acceptable' or better, at all three levels of the enterprise: blue-collar workers, white-collar workers, and management. Except for two, who rated these qualifications rather low.

3.4.2 Qualification level in ICT

Table 11 Qualifications of own employees

In the company					
	Very low	rather low	acceptable	high	very high
blue-collar worker			3	3	1
White-collar worker			2	4	2
management			3	3	2

In the case of the ICT qualifications of the own workers / co-workers, the level was considered by all experts as 'acceptable' or better, at all three levels of the enterprise: blue-collar workers, white-collar workers, and management.

Table 12 General ICT qualifications in the region

In the region					
	very low	rather low	acceptable	high	very high
Blue-collar worker		3	2	2	
White-collar worker			5	2	
management			5	2	

Similar to the qualification level of logistics in the region, but a little bit different than the qualification level of ICT in the own company / institution, most of the experts rated the qualification level of ICT as 'acceptable' or better at all three levels. But this time, three rated this qualification level rather low.

3.4.3 Expectations for future educational training in logistics and ICT

At the top of the list, the experts demanded a better education regarding language skills, especially in English. Of course it will be very helpful to know another of the many languages spoken around the BSR.

Not only are languages important: the experts also asked for a wider spectrum of study possibilities regarding logistics. In general, more technical specialists are needed in the region. At this point the experts pointed out the necessity to form interdisciplinary thinking specialists.

The continuous education of the employees was also regarded as very important.

3.5 Findings regarding company expectations

3.5.1 Expectations and wishes for further logistics and ICT development

Following is a list of some expectations and wishes expressed by the interviewed experts:

- Standardization of application interfaces and offers

- Inclusion of private competence and PPP-structures
- Port development: deepening of navigation channel, extension of berths
- Speed-up termination of the connection with the highway A14
- Optimization of the SCM
- Better utilization of capacities
- Development and extension of the general infrastructure

3.5.2 Policy recommendations

Among the concrete policy recommendations made by the experts, from the retail industry the outsourcing of competence-intensive areas in specified service providers and PPP-structures was suggested.

The logistic service providers asked for the creation of efficient interfaces between harbour railway, forwarding agencies, and carriers.

As mentioned repeatedly before, the development of an overall strategy (or concept) for the region constitutes one of the top priorities according to the experts.

3.6 Interpretation of results and conclusion

Despite of the good location of Mecklenburg-Vorpommern in the BSR, and the increasing improvement of the logistical, as well as the ICT infrastructure, the exodus of qualified workforce – and therefore also of companies – has influenced the industrial density in the region negatively.

After the reunification of Germany in 1990, many people left East Germany in search of a better living standard. This had an important impact on the quality of the remaining workforce.

With the EU-enlargement towards East in 2004, and with the future incorporation of countries like Bulgaria and Romania – where production costs (mainly labor costs) are lower – many companies have left Mecklenburg-Vorpommern, contributing to the deindustrialization of the region.

Both of these issues have probably influenced strongly in the fragmentation of the different local authorities concerning integration and creation of a common supraregional economic strategy.

The regional authorities are now confronted with the tough task of getting qualified workers and companies back to settle in the region.

They have to transform Mecklenburg-Vorpommern into an attractive region for qualified workers and big industrial companies to settle.

From the experts' statements it is clear that a closer cooperation among the key players of the regional economy: local authorities, companies, educational institutions, etc., should exist.

To keep up with the growing internationalization in business, it is very important to improve the English skills of the workforce. And to take advantage of the regions' strength as a logistical hub, it is very important to increase the offer of logistic-related careers.

In the field of logistics, local authorities should undergo an update concerning their competences, in order to be a more effective key player in the cooperation among the different economic players in the region.

In the field of ICT, the extension of the high-speed-connections can be improved. Companies working in this sector should cooperate more together, and develop a stronger ICT-cluster. On the other hand, the actual IT solutions / services should be adapted to be able to offer them in other markets other than only in Mecklenburg-Vorpommern.

At a more general level, cooperation in international projects (i.e. EU-projects) and town twinning has had very positive influence for the establishment of new contacts.

Although much has been – and is being done – for the development of the traffic networks (road, rail, air, water), it is advisable to continue with this effort. A special mention goes to the development of the railway connections from the seaport of Rostock, due to the rapidly increasing cargo volumes.

The different tariff regulations between some countries in the BSR are becoming an obstacle for the increasing movement of goods. Therefore, the local, regional, and national authorities should make an effort to standardize a little bit more these regulations.

4 SUMMARY AND OUTLOOK

Recapitulating the central themes which the experts believe will influence the future scenario of Mecklenburg-Vorpommern regarding logistics and ICT, here we will present a summary of those ideas.

Despite of the existing fast connections and a relatively high technology, the experts think there is still plenty of space to grow, and extend the existing networks and DSL-connections.

In the field of logistics there are several more issues to tackle. The most important of them is probably the development of a regional strategy, which will help solve several of the other problems directly depending from this one.

With the reunification of Germany, the qualified workforce started looking for better job opportunities in West-Germany; professionals and specialists started leaving the companies.

Parallel with the exodus of the workforce, and as a consequence of the EU-enlargement towards East, many companies saw the possibility to establish a company in these new EU-members where costs are in general lower. With workforce and companies leaving the region, the industrial density in Mecklenburg-Vorpommern started diminishing. With this scenario, and in order to be competitive, it is necessary to:

- develop the existing infrastructure
- intensify the language skills of the existing workforce
- offer more possibilities to study logistic-related careers

At an EU-level, the experts asked for better and uniform safety regulations.

And as a general problem, the experts mentioned the increasing fuel prices that directly affect the transport costs.

APPENDIX

Appendix 1 Interview guideline

Structure

Introduction:

<i>Introduction of the interviewer</i>
<i>Short presentation of the LogOn Baltic project and its objectives</i>

Question clusters:

<i>I: Trends (1 question)</i>	Σ min 5 min
<i>II: Business Connections (3 questions)</i>	Σ min 12 min
<i>III: Regional Development (9 questions)</i>	Σ min 30 min
<i>IV: Education/Skills (2 questions)</i>	Σ min 5 min
<i>V: Outlook (2 questions)</i>	Σ min 8 min

Interview – Basic information

<p><u>Interviewer</u></p> <p>Name:</p> <p>Institution:</p>

<p><u>Interviewee</u></p> <p>Name:</p> <p>Function:</p> <p>Name of institution:</p> <p>Type of institution:</p> <table style="width: 100%;"> <tr> <td><input type="checkbox"/> Manufacturing industry</td> <td><input type="checkbox"/> Local authority</td> </tr> <tr> <td><input type="checkbox"/> Retail industry</td> <td><input type="checkbox"/> Support initiative</td> </tr> <tr> <td><input type="checkbox"/> Logistics service provider</td> <td><input type="checkbox"/> Research institution</td> </tr> <tr> <td><input type="checkbox"/> Logistics consultant</td> <td></td> </tr> </table>	<input type="checkbox"/> Manufacturing industry	<input type="checkbox"/> Local authority	<input type="checkbox"/> Retail industry	<input type="checkbox"/> Support initiative	<input type="checkbox"/> Logistics service provider	<input type="checkbox"/> Research institution	<input type="checkbox"/> Logistics consultant	
<input type="checkbox"/> Manufacturing industry	<input type="checkbox"/> Local authority							
<input type="checkbox"/> Retail industry	<input type="checkbox"/> Support initiative							
<input type="checkbox"/> Logistics service provider	<input type="checkbox"/> Research institution							
<input type="checkbox"/> Logistics consultant								

Date, duration and location of interview

Date:

Duration:

Location:

Interview – Questions**I: Trends**

I.1.) What do you think are currently the most important trends relevant for logistics and ICT that will influence:

a) your company / institution / organisation?

Logistics:

ICT:

b) your region?

Logistics:

ICT:

II: Business Connections

II.1.) Do you have any business contacts to the Baltic Sea Region? If so, please differentiate among:

Number of contact	0-5	6-15	16-25	>25
Federal Republic of Germany	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poland and Baltic States (Lithuania, Latvia, Estonia)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Russia	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scandinavia (Denmark, Sweden, Finland, Norway)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Why do you have so many / no contacts?

II.2.) Are there any logistic projects planned with new suppliers / customers in the BSR in the next year(s)? *[for industry and research]*

Number of logistics projects	0-2	3-5	6-10	>10
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What kind of projects?

II.2.) Are there any (state-run) cross-national projects planned with local authorities / institutions / companies in the BSR in the next year(s)? [for local authorities and support agencies]

Number of cross-national projects	0-2	3-5	6-10	>10
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

What kind of projects?

II.3.) When cooperating with partners from Eastern Europe, new EU member countries, Russia, Scandinavia¹ respectively what kind of challenges did emerge?

Please describe inhibitors or possible constraints when dealing with these foreign business partners:

- a) concerning the business relations (e.g. intercultural differences, business performance factors, skills of workforce, management skills)
- b) concerning institutional setup (e.g. transport and ICT infrastructure, general political conditions, ...)

III: Regional Development

III.1.) Do you know of any regional development activities in your region?

III.2.) What are the key regional development issues (e.g. concerning infrastructure, location, training, local support ...) for:

- a) logistics in your region?
- b) ICT in your region?

III.3.) What kind of former regional development projects in your region have been successful?

Number of successful regional development projects	<25%	25-50%	51-75%	>75%
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

How did you come to this judgement?

III.4.) In your opinion, what are the strengths and weaknesses in the area of logistics and ICT in your region? What determined your decision to

¹ Eastern European countries, Russia, Scandinavia will add Federal Republic of Germany respectively and cancel their home country.

locate in this region (please refer to special regional logistics competences, locational factors, infrastructural conditions, support programs, skilled workforce ...)?

	of Logistics	of ICT
Strengths		
Weaknesses		

III.5.) How do you think is the logistics competence level...

	very low	question-able	accept-able	high	very high
of your company/institution in comparison to leading companies in your branch?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
of your region in comparison to other regions in the Baltic Sea Region	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
of the local authorities in the region?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
of the support agencies in the region?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please comment.

III.6.) Is your company participating in logistics support agencies, networks or initiatives (e.g. for Hamburg Region: Logistics Initiative Hamburg, Süderelbe etc.²)? Why?

III.7.) How satisfied are you with the local authorities' support and policy (e.g. for Hamburg³: Wirtschaftsbehörde) concerning logistics and ICT issues?

Logistics:

very unsatisfied	rather unsatisfied	neither unsatisfied nor satisfied	satisfied	fully satisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please comment.

² please add locally the most important local agencies

³ please adapt locally

ICT:

very unsatisfied	rather unsatisfied	neither unsatisfied nor satisfied	satisfied	fully satisfied
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please comment.

III.8.) Where do you see room for logistical and ICT improvements?

Improvement	of Logistics	of ICT
a) in your company / organisation		
b) in local authorities		
c) in support agencies		

III.9.) How do you see the different roles and responsibilities for regional development (e.g. who should start development activities: state, public-private-partnerships, companies by themselves, associations, etc.)?

IV: Education/Skills

IV.1.) How would you value the employees' qualification level in logistics / ICT

a) in your company?

Qualification level in logistics					
	very low	rather low	acceptable	high	very high
blue-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
white-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qualification level in ICT					
	very low	rather low	acceptable	high	very high
blue-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
white-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

b) in the region?

Qualification level in logistics					
	very low	rather low	acceptable	high	very high
blue-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
white-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Qualification level in ICT					
	very low	rather low	acceptable	high	very high
blue-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
white-collar worker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide some background information on the professional qualification of your employees.

IV.2.) What educational training do you expect to be relevant in the future and how do you support further education and training in the area of logistics and ICT?

V: Outlook

V.1.) What are your expectations and wishes for further logistics and ICT development (from local authorities, support agencies...)?

V.2.) Do you have any concrete policy recommendations in the area of logistics / ICT?

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