

*LogOn Baltic Regional reports*  
48:2007



**EXPERT INTERVIEWS IN  
ÖSTERGÖTLAND, SWEDEN -  
Results and analysis of the  
intersectoral expert interviews in  
the field of logistics and ICT**

**Håkan Aronsson,  
Staffan Eklind and  
Naveen Kumar**



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## EXECUTIVE SUMMARY

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

The aim of Log on Baltic is to present ideas and solutions to improve and encourage interactions between logistics and ICT competence and spatial planning. This will lead to opportunities for Small and Medium-sized companies (SMEs) to strengthen competitiveness in the BSR.

One of the main methodologies used within the Log on Baltic project are expert interviews. In this study 13 companies and institutes were interviewed.

All interviewees seem to have a common opinion that globalization is the overall trend. Centralization of distribution centres and outsourcing are other significant trends.

The interviews conducted that the region of Östergötland has a strong position as logistic centre and leading in the area of ICT both when it comes to develop and commercialise new ICT software products.

Even if the infrastructure is well developed and the geographical position is very good there is still a need for a strong regional actor that actively could support initiatives related to regional growth.

The logistics and ICT competence in the region is quite high according to the experts. Compared to leading companies in same business sector competence level is competitive. Competence level at local authorities however needs improvement.



## SAMMANFATTNING

Den här studien är en del av Log on Baltic projektet. Log on Baltic är ett projekt in The Baltic Sea Region (BSR) INTEREG III B Neighbourhood Programme, som stöd av European Regional Fund (ERDF), som en del av Strukturfonderna och är motfinansierat av nationella projektpartners.

Syftet med projektet är att utveckla interaktionen mellan logistik & ICT och infrastrukturplanering samt stärka små- och medelstora företags (SME`s) konkurrenskraft i Östersjöområdet.

En av metoderna som används i projektet är att göra intervjuer med experter inom dessa områden. I studien genomfördes 13 intervjuer.

Alla intervjuade verkar överens om att den övergripande trenden är globalisering. Centralisering av distributionscenter och outsourcing är andra tydliga trender.

Experterna är eniga om att regionen Östergötland har en mycket stark position som logistik center och regionen är ledande inom ICT både vad gäller utveckling och kommersialisering av mjukvaruprodukter.

Infrastrukturen i regionen är relativt väl utvecklad och det geografiska läget är utmärkt så behövs en stark regional aktör som aktivt kan arbeta med och stödja olika initiativ för tillväxt i regionen.

Kompetensnivån för logistik & ICT i regionen är hög enligt experterna. Om man jämför med ledande företag i motsvarande branscher bedöms kompetensen ligga på samma nivå. Kompetensnivån inom lokala myndigheter behöver dock utvecklas till en högre nivå.



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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

The regional partners in Sweden, Östergötland are Linköping University, Transportcentrum and Östsam.

The division **Logistics Management at Linköping University** is one of the leading academic institutions in the Nordic countries in management research within the field of logistics. Courses are given both at the Master of Science programmes at the Institute of Technology as well as at the Master of Business Administration programmes. Since the division was established in 1971/72, it has developed into one of the profiles of the Institute of Technology with international research and education of high quality as a signature.

**Transportcentrum AB** is a development company for free enterprise and competence within the logistic and transport area. The role is to offer advice and support in the establishment and development of all types of businesses seeking efficient logistic solutions. The assistance is not restricted to pure logistic companies but also those businesses interested in establishing their operations in the Norrköping region to take advantage of infrastructure, cost position, competence requirements etc.

**Östsam Regional Development Council** works towards the achievement of an enduring economic, social and cultural development of Östergötland and contributes to give the inhabitants a good life. Östsam has been given the assignment by its members – Östergötland's 13 municipalities and the County Council – to work with regional development from the perspective of four principal areas of work: communications and IT, lifelong learning, culture, nature and leisure, development of trade, industry and tourism.

### 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 Östergötland 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 numerous 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. Finally, 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.

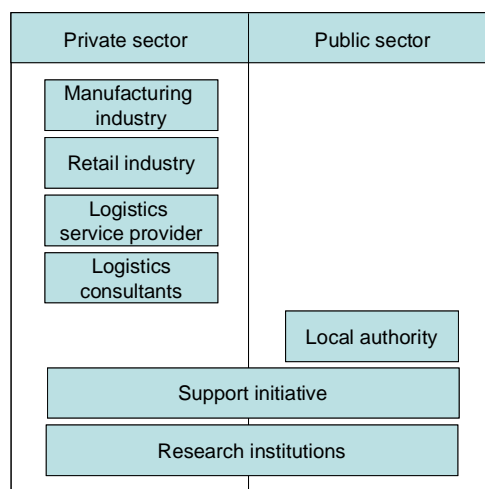


Figure 1 Target groups for the interview

In total 13 interviews was conducted in the region of Östergötland in Sweden mainly during March and April 2007. Distribution of the interviews by category looks as follows:

- Manufacturing industry, 2 interviews
- Retail industry, 1 interview
- Logistics service provider, 5 interviews
- Logistic consultants, 1 interview
- Local authority, 1 interview
- Support initiative, 1 interview
- Research institute, 2 interviews

The majority interviewed experts preferred to have their identity anonymous. They considered themselves to give their personal opinion as an expert rather than to give the respective organisations view on the discussed issues. For that reason the organisations will not be revealed in this report.

## 2.2 Main topics covered in the interview

The interviews were conducted according to a semi structured interview guideline. Most questions were open ended questions. A quantitative scale was used in addition to qualitative answers, when it seemed useful for a later comparison between 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 4.1 to 4.5 refer to the five parts of the guideline. Section 4.6 summarizes and interprets the most important results.

#### **3.1 Findings regarding trends in logistics and ICT**

##### **3.1.1 Trends in logistics**

All interviewees seem to have a clear view that globalisation is the overall trend. This will lead to pressure for internationalization and cost competitiveness. Retail industry as well as service providers and consultants also in connection to internationalisation see that centralization of warehouses is increasing. This trend towards “Nordic distribution centres is obvious. The region of Östergötland has been successful in capitalising from this development. Companies like Good Year, Thomson, Philips, Samsung and Café Bar will exemplify this and they have recently located their logistics hub/facility in the region. Outsourcing of logistics for example TPL (Third Party Logistics) continues to be a strong trend. As a consequence there will be an increase in transport frequency and logistic cost efficiency will become an important issue.

Consultants also mentioned the need for specialization and networking. Companies either go towards to become “big players” or niche companies.

Research institute considered there is a need for better use of the transport network. The trend is towards co-operation by using each others networks. The concept is called “city logistics”.

Support initiative and also local authorities expect environmental concern to become more important in the near future. The increase in

intermodal transport solutions is indicative in this direction. It is obvious that modal shift from truck to rail transportation is taking place.

In Sweden there is need to give priority to infrastructure for hinterland access to the ports. At present time Swedish government conducts a study in order to prioritize among the ports regarding infrastructural needs. In order to make this infrastructure investment plan there is a need to define transportation nodes of strategic importance. Service providers, support initiative and local authorities agree that port of Norrköping has a potential to become a “strategic node” in the Swedish transportation network supported by the government.

### 3.1.2 Trends in ICT

Regarding trends related to ICT the interviewees generally did not have much to say. Probably because of they are more logistics specialists than ICT experts. However some trends could be identified. ICT will play an increasingly important role. Among service providers the customer order winner might be those companies who provide “best” ICT solutions to clients.

E-trade or internet web-shop selling will increase and also become a new sales channel for traditional retail companies. Service provider said that over time RFID will come and become important factor to simplify and secure quality. The security issue was also mentioned by manufacturing companies. Need for standardisation and transparency were other keywords mentioned. Research institute claimed that ICT sector in the region has a high maturity with a strong ability to commercialize new technology and ideas.

## 3.2 Findings regarding business connections in the Baltic Sea Region

### 3.2.1 Current business contacts and projects in the BSR

The newly opened markets on the other side of the Baltic Sea opens up promising and fast growing business potential. Earlier problems concerning Baltic States and Poland related to business culture are

more or less eliminated today. Regarding Russia however some obstacles' are mentioned.

Support initiative as well as port of Norrköping has ongoing and good connections to ports in Baltic Sea. As an example Port of Ventspils could be mentioned and the relation was created in a joint European Union (EU) project some years ago.

Those contacts have helped manufacturing companies in the region to establish transport solutions in Baltic States and Russia. A service provider interviewed also have the business idea to offer "industrial shipping" in the Baltic region. Other service provider said that their contacts often were indirectly via business partners or the customer's customer.

Research institute have many contacts in BSR as a natural part of its business/operation but did not specify.

Table 1 Number of current business contacts & projects in the BSR

Number of contact	0-5	6-15	16-25	>25
Federal Republic of Germany		5		3
Poland and Baltic States (Lithuania, Latvia, Estonia)	4		1	3
Russia	4	3	1	
Scandinavia (Denmark, Sweden, Finland, Norway)				8

### 3.2.2 Planned business contacts and projects in the BSR

Manufacturing companies as well as retail companies will increase activities in BSR in next couple of years. Research industry is planning to apply for EU funding for three joint projects with partners from Baltic Sea countries. Service providers as well as support initiatives have business connections and contacts that are constantly being developed.

Table 2 Number of logistics projects in the BSR

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

Table 3 Number of cross-national projects in the BSR

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

### 3.2.3 Constraints and problems of co-operations in the BSR

Experts mentioned that Baltic States and Poland are nowadays working more or less similar to Sweden. Estonia seems to have the most functioning transportation network in Baltic States. In terms of difficulties and constraints the interviewees mentioned dealing with Russia. Of course this also has to do with lack of knowledge and experience about Russia. Problems mentioned have to do with:

- Difficulties to find correct officials
- Customs procedures/practices
- Language skills
- Structure in business relations

The main problem according to service providers is because of the changes that continuously take place in laws and regulations. To handle these issues service providers need to have central experts to handle transports to Russia.

## 3.3 Findings regarding regional developments

### 3.3.1 Known regional development activities

The interviewees seem to have relatively good understanding of some major development activities in the region. The so called "Ostlänken" and "Norrköpingspaketet" were mentioned by almost all respondents.

Ostlänken is a high speed railway project to connect to Stockholm and Norrköpingspaketet include new and complimentary infrastructure to Port of Norrköping.

### 3.3.2 Key regional development issues

The major regional development issues are related to infrastructure and how regional bodies can promote and support growth and private sector.

The port of Norrköping has a potential to be a vehicle for growth in the region. In order to achieve this, the infrastructure needs to be improved. Norrköpingspaketet consists of three main subprojects. A deeper and broader seaway approach to the port, new railway facility including a combi-terminal and a new road connection to E 4. This will in an efficient way link the port to the Trans European Network (TEN).

This development is a necessity to support all new distribution centres recently located in Norrköping in order to create sustainable and efficient transport solutions.

A main responsibility for regional development agencies is to create a good business climate. This could be done by investment in infrastructure and creating local development arenas. Activities related to this matter are also city planning, availability of land to enable companies to grow as well as new business to locate and so on. A critical factor to achieve this comes with availability of right competence. Some interviewees claimed there is lack of a regional organisation to support the regions growth potential.

### 3.3.3 Successful regional development projects

The answers concerning success of regional development projects are somewhat difficult to conclude. Some of the interviewees have difficulties to answer the question because they did not have any connection to the projects or activities. Service providers encourage more of regional co-operations in order to develop the region in contradiction to develop the individual community. It can be interpreted as a lack of common regional projects.

Table 4 Number of successful regional development projects

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

### 3.3.4 Strengths and weaknesses of the regions

A majority of experts agreed that the region in general has a very strong position as a logistic centre. The geographical position is excellent; infrastructure includes all modes of transportation (sea, rail, road and air). Several companies run their distribution for Nordic market from the region. All major service providers are established and provide services. Logistic competence, research and training are in place. ICT strength includes a number of software companies that develop and market logistics systems in the region.

Weaknesses that could be mentioned are related to some road infrastructure projects. No major ICT weaknesses were mentioned.

### 3.3.5 The logistics competence level

The logistic competence level in general in the region is quite high. Benchmarking to leading companies in same business, the estimate is that companies and institute in the region play in the same industry.

Competence on the regional level needs to be improved. The situation is the same for local authorities. Most experts considered the competence level in the region of Östergötland as high, compared to other regions within Baltic Sea area.

Table 5 Level of regional logistics competence

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

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

Logistic service providers, local authorities and support initiatives participate in regional networks concerning logistics issues. As well do retailers and manufacturing companies participate especially in issues related to education and training.

### 3.3.7 Assessment of local authorities' support and policy concerning logistics and ICT issues

Table 6 Assessment of local authorities' support and policy concerning logistics

very unsatisfied	rather unsatisfied	neither unsatisfied nor satisfied	satisfied	fully satisfied
	2		3	

Table 7 Assessment of local authorities' support and policy concerning ICT

Very unsatisfied	rather unsatisfied	neither unsatisfied nor satisfied	satisfied	fully satisfied
	2	1	2	

In general local authorities support needs improvement and should focus more on activities of regional interest.

### 3.3.8 Proposals for improvement

Experts agreed that regional co-operation have to increase. Local authorities should increase their contacts with the private sector to get a better understanding of company needs. In general competence level needs to improve. A better understanding would make it possible to act more intelligently. Institutes should shift focus from transportation to logistics.

### 3.3.9 Roles and responsibilities in regional development

Try to create a regional arena where public actors and private companies can meet to discuss regional development issues. Initiative might come from companies in the region. Similar setup is made for the marketing work in the region. A public private partnership could be a successful initiative and could play a key role.

## 3.4 Findings regarding education and skills in the regions

### 3.4.1 Qualification of employees in logistics

The logistic competence level seems to be pretty high in companies. Reason for this is related to relevant education on strategic, tactical as well as operational level. University of Linköping and Programme in

Management and logistics play a major role as the leading institute in Sweden.

Table 8 Qualification level in logistics in expert companies

Qualification level in logistics					
	very low	rather low	acceptable	high	very high
blue-collar worker			2	3	
white-collar worker		1		5	1
management		1		3	4

Table 9 Qualification level in ICT in expert companies

Qualification level in ICT					
	very low	rather low	acceptable	high	very high
blue-collar worker			2	2	1
white-collar worker				4	2
management				4	3

Table 10 Qualification level in logistics in the Östergötland region

Qualification level in logistics					
	very low	rather low	acceptable	high	very high
blue-collar worker		1	3	4	
white-collar worker		1	2	5	
management		1	1	6	

Table 11 Qualification level in ICT in the Östergötland region

Qualification level in ICT					
	very low	rather low	acceptable	high	very high
blue-collar worker		1	3	3	
white-collar worker		1	1	5	
management		1	1	5	

### 3.4.2 Qualification of employees in ICT

Qualification in ICT is relatively high. This is natural due to tradition in the region, good education system and companies with high degree of ICT usage.

### 3.4.3 Expectations for future educational training in logistics and ICT

Increase the basic knowledge in logistics and ICT in larger groups of people. Young people “bring” these skills from school.

## 3.5 Findings regarding company expectations

No clear conclusions can be drawn. In general the competence level is regarded as high. There is however an expected need for further education in different areas depending on the situation for the companies.

### 3.5.1 Expectations and wishes for further logistics and ICT development

Most experts would like to see an increased regional co-operation. It was expressed as a move from just talking to action. Politicians and business people should think regional not local. More support from local authorities in the area of infrastructure development.

### 3.5.2 Policy recommendations

There is a need for a strong regional actor that promotes the region and actively tries to find new companies that want to establish business in the region and that also makes it easy for companies to move to the region, For example helping them with finding appropriate land, buildings and so forth that suits their business needs.

It is the region that should be promoted and not the cities, which calls for an increased regional cooperation. An increased regional cooperation would make it possible to use more resources on building professional and competent regional support organisations for contact with the business community. Today many of the interviewed persons believe that there is a lack of professionalism and competence among the local actors.

### 3.6 Interpretation of the results and conclusion

Conclusions from the interviews are that the region of Östergötland has a strong position as logistic centre and leading in the area of ICT both when it comes to develop and commercialise new ICT software products.

Even if the infrastructure is well developed and the geographical position is very good there is still a need for a strong regional actor that actively could support initiatives related to regional growth.

The logistics and ICT competence in the region is quite high according to the experts. Compared to leading companies in same business sector competence level is competitive. Competence level at local authorities however needs improvement.

In the area of logistics, the region is well situated geographically, with basically a good infrastructure for all modes of transportation, except for airfreight. Most airfreight is today flown to Copenhagen for further distribution. There is however the following needs for improvements

1. A new combi-terminal for road-train transfers of goods
2. Improvements of the port of Norrköping allowing larger ships to enter.
3. An improved railway connection to the region that decreases the travelling time to neighbouring regions.



## 4 SUMMARY AND OUTLOOK

The region of Östergötland has just over 500.000 inhabitants; half of them live in the cities of Linköping and Norrköping. It is an appreciable number, but in comparison to other regions around the Baltic Sea it is still a small region. Today the competition between regions is escalating making it more difficult to attract new business to the region. The competitiveness of Östergötland as a region has the following advantages.

The region is strong in the area of ICT both when it comes to develop and commercialise new ICT software products. The workforce is well educated, and the availability of specialists is high due to the University.

In the area of logistics, the region is well situated geographically, with basically a good infrastructure for all modes of transportation, except for airfreight. Most airfreight is today flown to Copenhagen for further distribution. There is however the following needs for improvements:

1. A new combi-terminal for road-train transfers of goods
2. Improvements of the port of Norrköping allowing larger ships to enter.
3. An improved railway connection to the region that decreases the travelling time to neighbouring regions.

Two projects are at the moment discussed in the region that addresses these needs and that is Norrköpingpaketet and Ostlänken.

Another aspect that has been pointed out in the interview is that it is good infrastructure alone is not sufficient. There is a need for a strong regional actor that promotes the region and actively tries to find new companies that want to establish business in the region and that also makes it easy for companies to move to the region, For example helping them with finding appropriate land, buildings and so forth that suits their business needs.

It is the region that should be promoted and not the cities, which calls for an increased regional cooperation. An increased regional cooperation would make it possible to use more resources on building professional and competent regional support organisations for contact with the business community. Today many of the interviewed persons

believe that there is a lack of professionalism and competence among the local actors.

One project is at the moment discussed in the region addressing these questions, named 4:e storstadsregionen. The general conclusion is that there is a lot of talk but very little action so far.

The consequences of the trend among companies to become more international and to further centralise facilities for production and distribution has consequences for Östergötland as a region. The governmental bodies have to be centralised to meet these changes. One way of expressing that is that, today it is not cities competing with each other it is regions.

## 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>	$\Sigma$ min 5 min
<i>II: Business Connections (3 questions)</i>	$\Sigma$ min 12 min
<i>III: Regional Development (9 questions)</i>	$\Sigma$ min 30 min
<i>IV: Education/Skills (2 questions)</i>	$\Sigma$ min 5 min
<i>V: Outlook (2 questions)</i>	$\Sigma$ min 8 min

#### Interview – Basic information

<p><b><u>Interviewer</u></b></p> <p>Name:</p> <p>Institution:</p>
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<p><b><u>Interviewee</u></b></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	
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<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, Scandinavia<sup>1</sup> 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

<sup>1</sup> 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.<sup>2</sup>)? Why?

III.7.) How satisfied are you with the local authorities' support and policy (e.g. for Hamburg<sup>3</sup>: 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.

<sup>2</sup> please add locally the most important local agencies

<sup>3</sup> 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.)?

<b>IV: Education/Skills</b>
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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?

**LogOn Baltic Publications** (as of 21.9.2007)**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 REGIONAL DEVELOPMENT IN LITHUANIA - Development Measure Impact Analysis (DEMIA) on regional development related to logistics and ICT  
NN
- 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  
Naveen Kumar, Håkan Aronsson and Tomi Solakivi

### **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  
Eric Kron, Gunnar Prause and Tomi Solakivi
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- 34:2007 LOGISTICS SURVEY IN LITHUANIA  
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- 35:2007 LOGISTICS SURVEY IN SOUTHWEST FINLAND  
Tomi Solakivi
- 36:2007 LOGISTICS SURVEY IN POLAND  
Anna Trzuskawska and Tomi Solakivi
- 37:2007 LOGISTICS SURVEY IN SAINT PETERSBURG, RUSSIA  
Valeri Lukinsky, Natalia Pletneva and Tomi Solakivi
- 38:2007 LOGISTICS SURVEY IN ÖSTERGÖTLAND, SWEDEN  
Håkan Aronsson, Naveen Kumar and Tomi Solakivi

### **Expert interviews**

- 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  
Wolfgang Kersten, Meike Schröder, Carolin Singer and Mareike Böger
- 41:2007 EXPERT INTERVIEWS IN MECKLENBURGVORPOMMERN, 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
- 42:2007 EXPERT INTERVIEWS IN ESTONIA - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
Ain Kiisler and Seren Eilmann
- 43:2007 EXPERT INTERVIEWS IN SOUTHWEST FINLAND - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
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.
- 45:2007 EXPERT INTERVIEWS IN LITHUANIA - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
NN
- 46:2007 EXPERT INTERVIEWS IN POMERANIA, POLAND - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
Anna Trzuskawska
- 47:2007 EXPERT INTERVIEWS IN SAINT PETERSBURG, RUSSIA - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT Russia  
Natalia Ivanova

- 48:2007 EXPERT INTERVIEWS IN ÖSTERGÖTLAND, SWEDEN - Results and analysis of the intersectoral expert interviews in the field of logistics and ICT  
Håkan Aronsson, Staffan Eklind and Naveen Kumar

#### **Regional Profiles**

- 50:2007 REGIONAL LOGISTICS & ICT PROFILE: THE SOUTHERN METROPOLITAN REGION OF HAMBURG, GERMANY  
Wolfgang Kersten, Meike Schröder, Mareike Böger and Carolin Singer
- 51:2007 REGIONAL LOGISTICS & ICT PROFILE: MECKLENBURG-VORPOMMERN, GERMANY  
Eric Kron, Gunnar Prause and Gertraud Klinkenberg
- 52:2007 REGIONAL LOGISTICS & ICT PROFILE: ESTONIA  
Ain Kiisler
- 53:2007 REGIONAL LOGISTICS & ICT PROFILE: SOUTHWEST FINLAND  
Jarmo Malmsten
- 54:2007 REGIONAL LOGISTICS & ICT PROFILE: LATVIA  
Telematics and Logistics Institute Ltd.
- 55:2007 REGIONAL LOGISTICS & ICT PROFILE: LITHUANIA  
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- 56:2007 REGIONAL LOGISTICS & ICT PROFILE: POMERANIA, POLAND  
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- 57:2007 REGIONAL LOGISTICS & ICT PROFILE: SAINT PETERSBURG, RUSSIA  
Elena Timofeeva
- 58:2007 REGIONAL LOGISTICS & ICT PROFILE: ÖSTERGÖTLAND, SWEDEN  
Håkan Aronsson, Naveen Kumar and Staffan Eklind

#### **LogOn Baltic Master reports**

- 60:2007 STRUCTURAL CHANGES AND TRANSPORT CHALLENGES - A report about the Danish structural reform  
Kent Bentzen and Michael Stie Laugesen

#### **LogOn Baltic Regional reports**

- 70(FI):2007 VARSINAIS-SUOMEN LOGISTINEN KILPAILUKYKY  
Matti Takalokastari (toim.)
- 71:2007 AIR TRAFFIC SERVICE DEVELOPMENT IN TURKU REGION (*working title*)  
Pekka Jaakkola
- 72:2007 ENTERPRISE ICT (*working title*)  
Kalle Luhtinen

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