



Strategisk planläggning av verksamhetsmark är en av flera viktiga förutsättningar för att attrahera industrietableringar och få expansions- och nyinvesteringar

Business Sweden Invest
Klas Ericson och Kristina Boo
2019-10-10

Foreign companies have a significant impact on Swedish industry and economic development

50%

of Swedish export originates from foreign-owned companies

39%

of all employed in manufacturing industry employed by foreign-owned companies

2 909

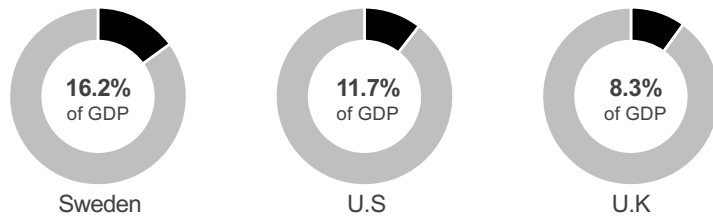
Billion SEK

Investments assets owned by foreign companies in Sweden (of which 1 1 81 billion SEK is within manufacturing)

The manufacturing industry in Sweden – the backbone of the Swedish economy

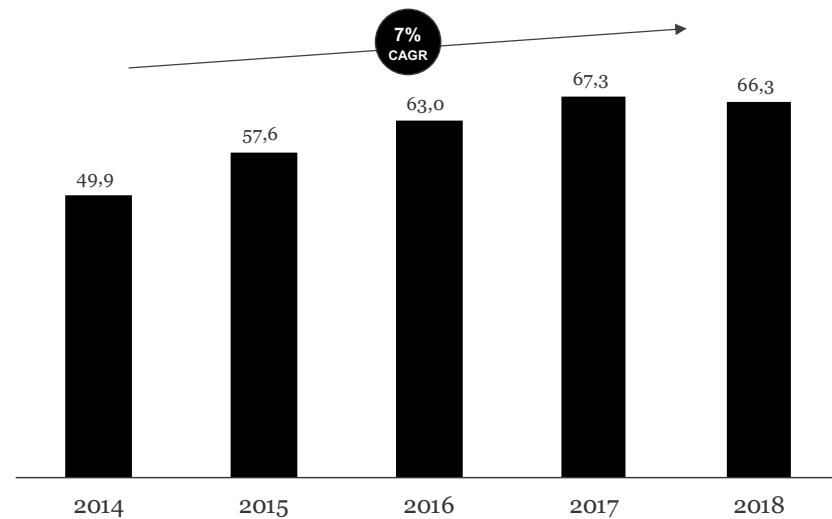
THE MANUFACTURING INDUSTRY'S CONTRIBUTION TO GDP

GDP Share
(Manufacturing, value added % of GDP, 2018)



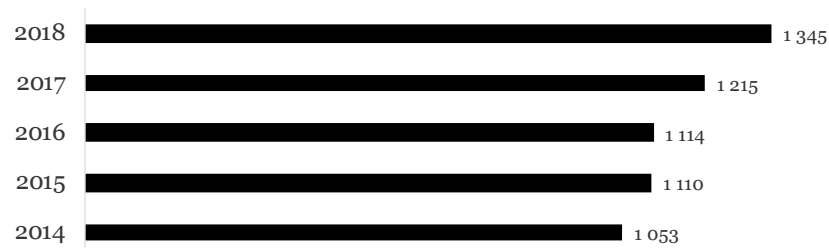
INVESTMENT GROWING AT AN AVERAGE ANNUAL RATE OF 7%

Investments in buildings, machinery and equipment
BSEK



STEADY INCREASE IN EXPORTS DURING THE PAST 5 YEARS

Exports
BSEK



Advanced manufacturing is thriving in Sweden: 6 reasons why



Top competence

- High skills in automation, lean and flexible manufacturing
- Advantageous employer/labor relations – low risk for strikes
- Very high English proficiency level: #1 globally



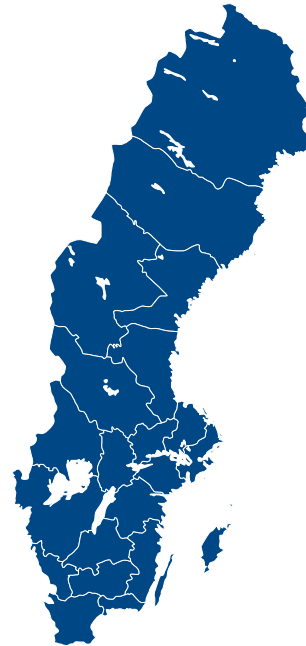
Cost competitive & productive

- Top 3 lowest electricity costs in Europe
- Competitive labor costs for highly skilled employees
- European leader in manufacturing productivity



Innovative & digitalized

- #1 European Innovation Scoreboard
- Frontrunner in implementing 5G, IoT and Digital tools
- Invests 3,3% of GDP in R&D



Strong industrial focus

- € 208B exports with positive trade balance
- Diversified industry and subcontractor network
- 6.8 € Billions in capacity investments 2018



Leader in sustainability

- 97% of electricity CO₂ free
- 11% GDP Growth and 18% CO₂ cut since 2010
- Leader in implementing UN Agenda 2030



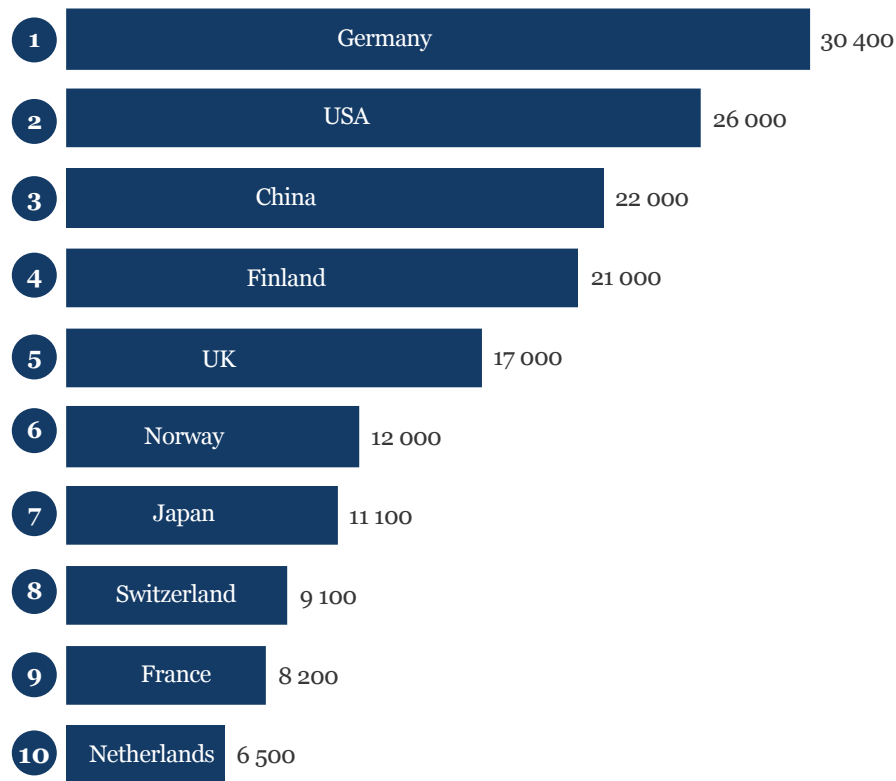
Stable business infrastructure

- Favorable tax legislation
- AAA credit rating by all major institutes
- Committed EU & WTO member

Source: Business Sweden Analysis

Foreign owned-manufacturing companies are located across the country but with higher concentration around the three largest regions

Top 10 countries based on employment



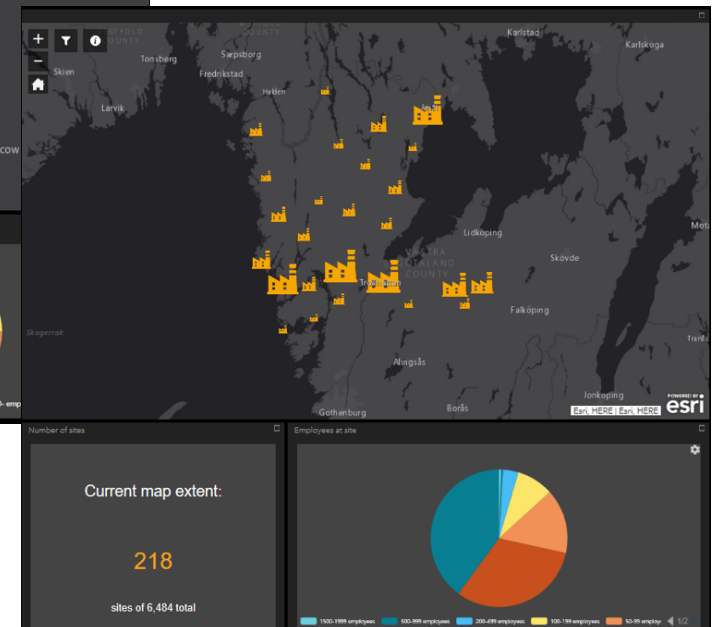
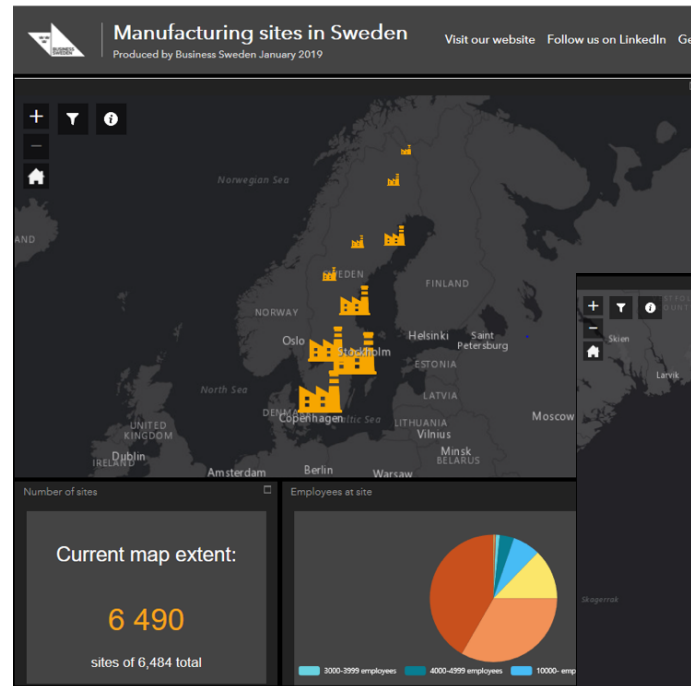
Top counties

Top 10 counties (based on foreign employers)	No. of employees
Västra Götaland	48 800
Stockholm	30 500
Skåne	23 400
Västmanland	10 400
Jönköping	10 100
Östergötland	10 000
Örebro	7 800
Dalarna	7 700
Värmland	7 000

Source: SCB 2019, Business Sweden Analysis Note: *Approximate numbers ** Volvo Cars employ 21,000 out of the total

Manufacturing sites in Sweden

Interactive map available on our website

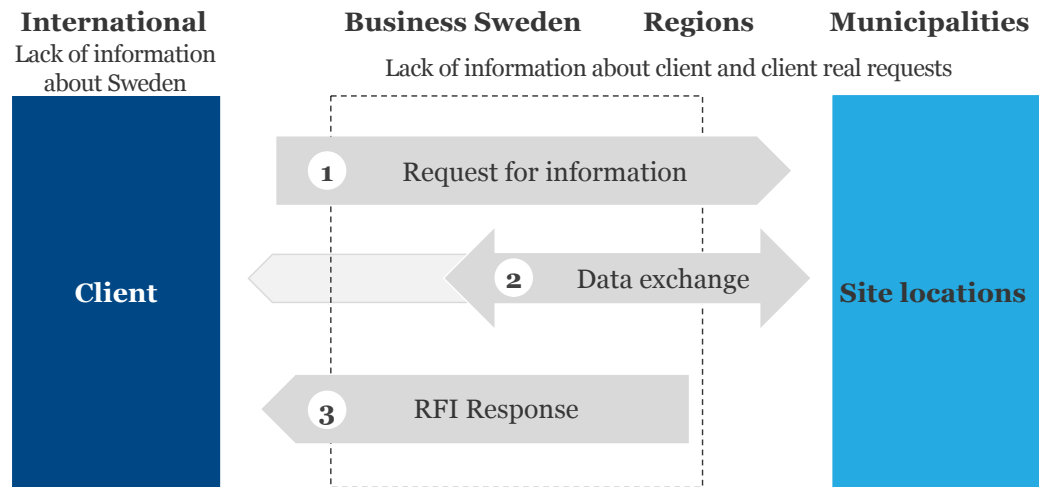


“In a global organization you are constantly exposed to competition both externally and internally”

Lotta Ljungqvist, President and CEO GE Nordic

The first step of the site selection process is often time sensitive and with a number of unknowns

Available and zoned land is a cut-off criteria for most companies in site selection processes

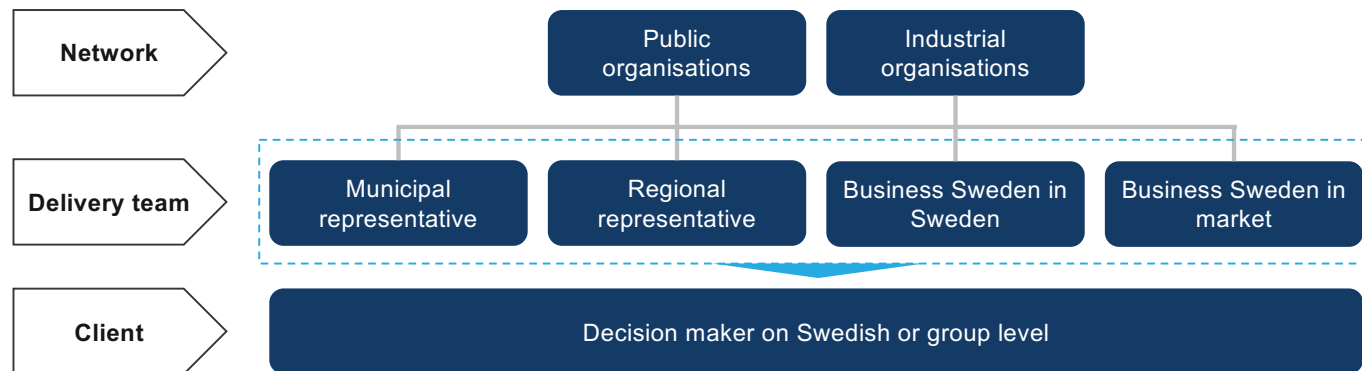


- 1** Request for information
- The client defines and confirms site needs and preferred locations
 - Knockout criteria are set in order to send an RFI document to selected regions

- 2** Data exchange
- RFI is sent to applicable regions that in turns send out information to municipalities
 - Important coordination of questions and gathering of data in the RFI process
 - Often lack of all information in this process and short of time

- 3** RFI Response
- Data is presented to client and commonly returns with more detailed questions
 - Site are sorted out quickly by client if not meeting demands

A structural approach and cooperation is key to reach success in investment decisions



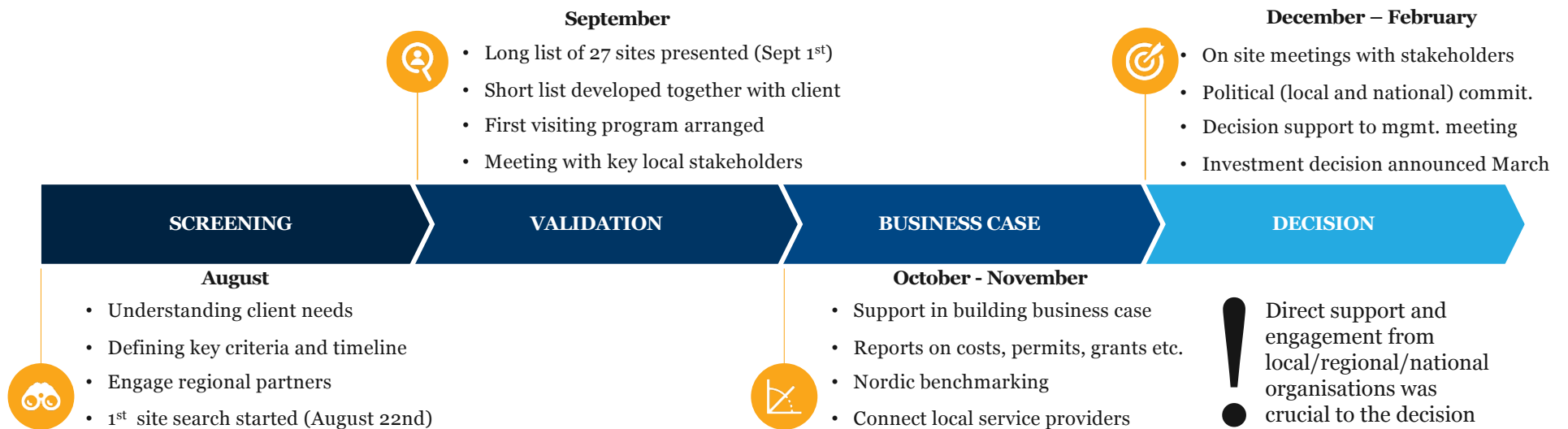
Case example: New establishment

Project Iron

About the client and project scope

- Listed multinational company developing and manufacturing products for the construction industry
- Asked Business Sweden to identify site and facilitate conditions for the construction of a new factory with a total investment sum of ~ €40 millions
- In parallel the client was also evaluating other international locations and needed solid evidence in favor of Sweden to convince group level board

Process, key deliverables and milestones



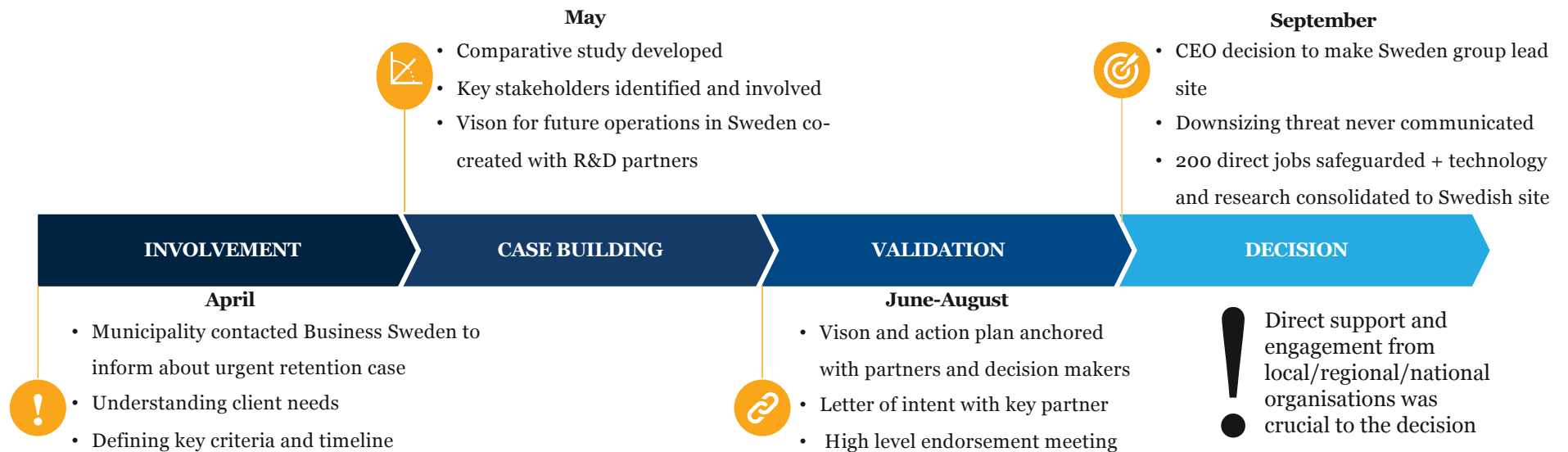
Case example: Consolidation

Project Industristrategi

About the client and project scope

- Multinational company within the transport industry
- 3 R&D sites in Europe to be consolidated into 1 group lead site for R&D. The Swedish city was one of the sites evaluated
- Project scope: The site management in Sweden needed strategic and hands-on support to build the business case and elevate Sweden's advantages

Process, key deliverables and milestones



Lessons learned

The value of being a team
delivering in a case

Decision makers need our full
support to understand and present
the strengths of Sweden

Things can be done to improve a
business case regarding an
investment in Sweden




**BUSINESS
SWEDEN**

THE SWEDISH TRADE & INVEST COUNCIL