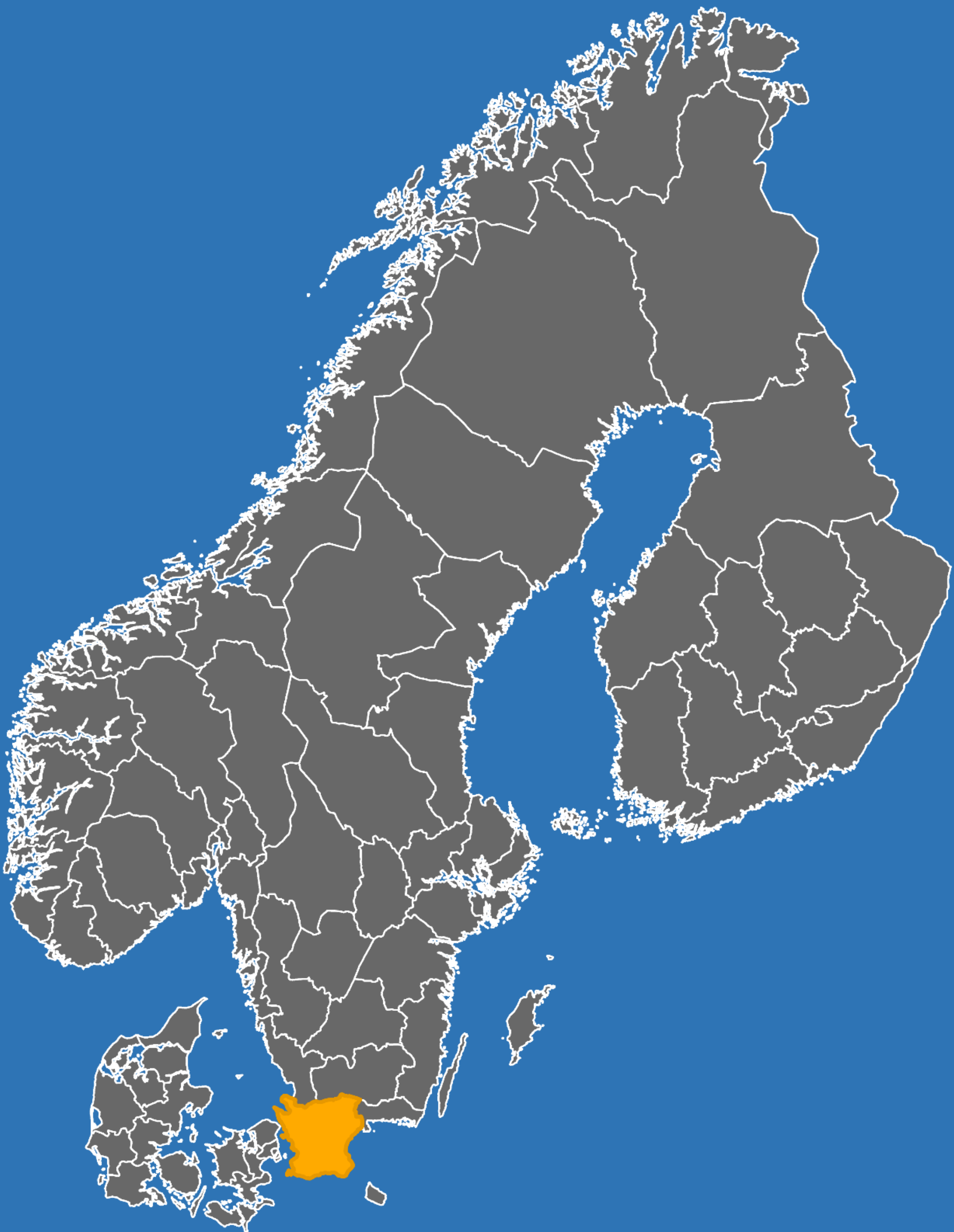

SKÅNE

FACTS AND KEY TRENDS

SKÅNE – FACTS AND KEY TRENDS

Utgivningsår: 2017

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Foreword

Region Skåne and the City of Helsingborg, together with partners in Western Sweden and the Oslo region, have commissioned the OECD to conduct a so-called Territorial Review of the Megaregion Western Scandinavia. A review of opportunities and potential for greater integration and cooperation between the regions and cities in Western Scandinavia.

This report is a brief summary of the supporting data submitted by Skåne to the OECD in December 2016 and mainly contains regional trends, strengths and weaknesses. The report largely follows the arrangement of all the supporting data submitted to the OECD, however, the policy sections have been omitted. All the data sets have been produced by a number of employees of Region Skåne and the City of Helsingborg. During the spring, corresponding reports have been produced for both Western Sweden and the Oslo region.

The first study mission was conducted by the OECD in January 2017, where they met with experts and representatives from Skåne and the Megaregion. In late April, the OECD will be visiting Skåne and the Megaregion again with peer reviewers from Barcelona, Vienna and Vancouver for a second round of study mission. The OECD's final report will be presented and decided upon within the OECD Regional Development Policy Committee (RDPC) in December 2017, and subsequently the OECD Territorial Review Megaregion Western Scandinavia will be published.

Malmö, April 24, 2017

Anna Bjärenlöv	Angelica Nilsson
Region Skåne	City of Helsingborg

Members of the Skåne steering committee for the review of the Megaregion Western Scandinavia

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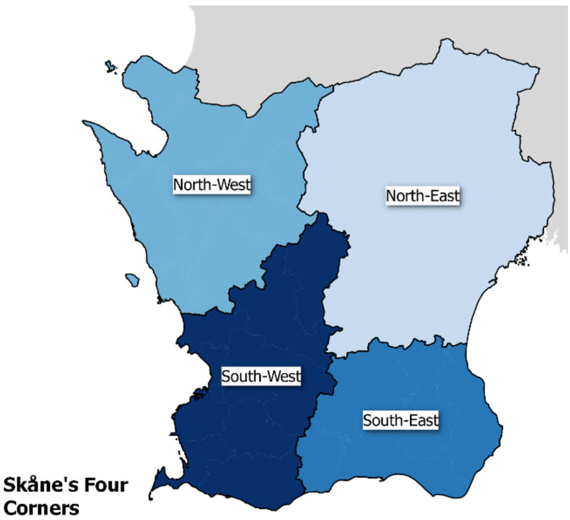
1.1 Skåne general facts

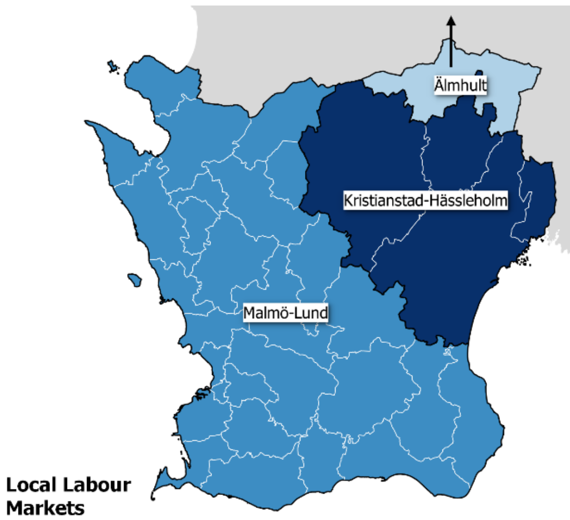
Skåne is Sweden's southernmost region and consists of 33 municipalities with a total of 1.3 million inhabitants. The largest cities are Malmö with 319,000 inhabitants, Helsingborg with 136,000, Lund with 116,000 and Kristianstad with 82,000. The land area of Skåne is 10,967 square kilometres and it borders the provinces of Halland and Småland in the north and Blekinge in the east.

Skåne has two regional labour markets, of which the largest is Malmö/Lund/Helsingborg, comprising 28 of Skåne's 33 municipalities. In north-east Skåne is the Kristianstad-Hässleholm labour market, which consists of the municipalities of Hässleholm, Kristianstad, Östra Göinge and Bromölla in Skåne, as well as Sölvesborg in Blekinge County. Osby municipality belongs to the labour market of Älmhult in the County of Kronoberg. In many contexts, we usually refer to “Skåne’s four corners" which is a division of Skåne into north-western, north-eastern, south-western and south-eastern areas.

Skåne´s four corners



Skåne’s regional labour markets



Source: Region Skåne

Polycentric Skåne

Of the 250 urban areas located in Skåne, eight have been identified as regional centres: Malmö, Lund, Helsingborg, Landskrona, Ystad, Trelleborg, Hässleholm and Kristianstad. These eight urban areas are geographically scattered across Skåne. The geographical context in combination with the size of these centres has influenced the selection. Of these eight regional centres, three have been identified as growth engines based on the fact that they have larger population and employment growth than Skåne on average, providing growth potential for the entire region. These are Malmö, Lund and Helsingborg, cities that have considerable significance for the development of Skåne. They have a unique appeal due to their city character. Research and development, universities, the knowledge-intensive service sector and major cultural institutions are located here, as well as a wide range of retail. The growth engines are home to a significant part of the region's employment opportunities, and business is driven by a high degree of specialisation.

Skåne's regional developmental Strategy – Open Skåne 2030

In accordance with Swedish legislation on regional development, Region Skåne has a permanent mandate from the Swedish state to coordinate regional development issues and head the work to draw up a regional development strategy for Skåne.

The regional development strategy formulates and creates a broad joint approach to a common strategic objective for Skåne up until 2030. A strategic objective that strengthens cooperation between different stakeholders and contributes to the creation of a context, a story, for people living in Skåne. Skåne has adopted a joint strategic objective for "The Open Skåne" and selected five priority positions to realise that objective. Each position is associated with a number of sub-strategies and goals. By 2030, Skåne will have grown stronger in several areas.

The five priority positions are:

- Skåne will offer optimism and quality of life
- Skåne will be a strong, sustainable growth engine
- Skåne will benefit from its polycentric urban structure
- Skåne will develop the welfare services of the future
- Skåne will be globally attractive

Greater Copenhagen

Greater Copenhagen is a region that encompasses the area of eastern Denmark and Skåne in Sweden. The 79 municipalities in Greater Copenhagen, 46 Danish and 33 Swedish, are home to 4 million inhabitants and Scandinavia's largest recruitment base of high-skilled employees. The region offers world class research facilities and a creative business environment with access to the markets of two countries. The Greater Copenhagen & Skåne Committee is a political platform that was founded in January 2016.

Source: Greater Copenhagen

In close dialogue with business and other key stakeholders in Greater Copenhagen, the Greater Copenhagen & Skåne Committee launches strategic initiatives to generate economic growth and create jobs in Greater Copenhagen. The Greater Copenhagen & Skåne Committee is aiming to eliminate the cross-border barriers that prevent economic growth and business development in the region – aiming to connect people across countries and cultures.

1.2 Demographic structure, trends and population flows.

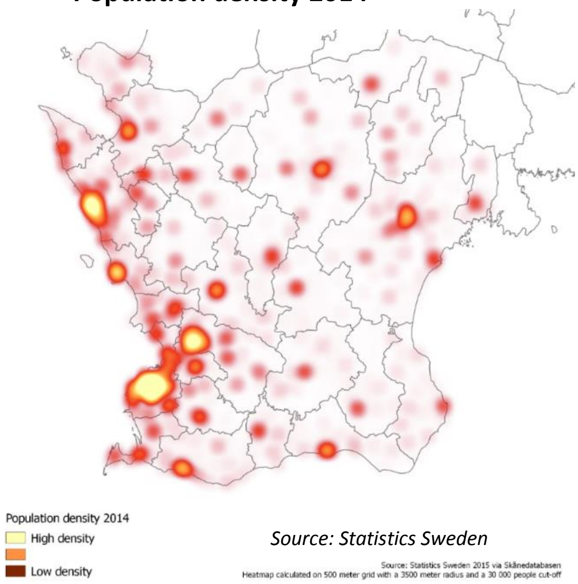
In 2016, Skåne's population growth was at record levels. The total population increased by 20,938 people, which was an increase of 6,200 compared to 2015, which also had historically high population growth. At the turn of the year 2016/2017, Skåne had 1,324,565 inhabitants. The largest part of Skåne's population growth is due to foreign net migration. What we are seeing now is that the large group of asylum seekers who arrived in 2015, are being granted residence permits in Sweden. Skåne also has a natural population growth and positive net migration in relation to other counties in Sweden. In 2016, all Skåne's municipalities saw an increase in their populations. The biggest municipalities of Malmö, Helsingborg and Lund saw the largest increases. The western part of Skåne is increasing faster than the eastern part.

Population density

Skåne has a relatively high population density with 121 people per km^2. This is the second highest In Sweden after Stockholm, with 348 people per km^2. Western Sweden has a population density of 70 people per km^{2}-. The average population density in Sweden is 25 people per km^2.

The most densely populated part of Skåne is found along the west coast, were the major cities of Malmö, Lund and Helsingborg are located. The most sparsely populated areas are in the north and east of Skåne, e.g. Osby in the north-eastern part of Skåne, with less than 23 people per km^2.

Population density 2014

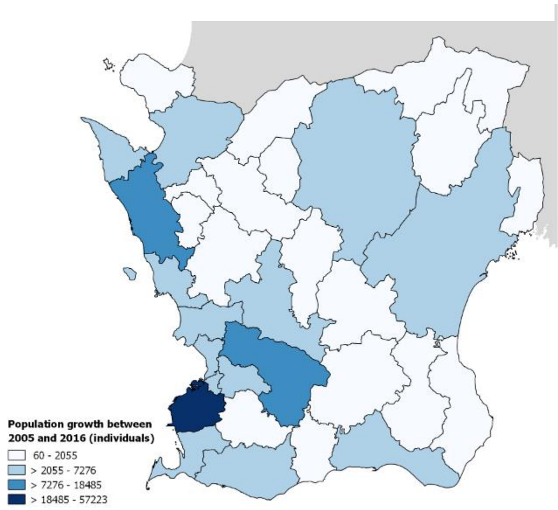


Source: Statistics Sweden

Population growth in Skåne

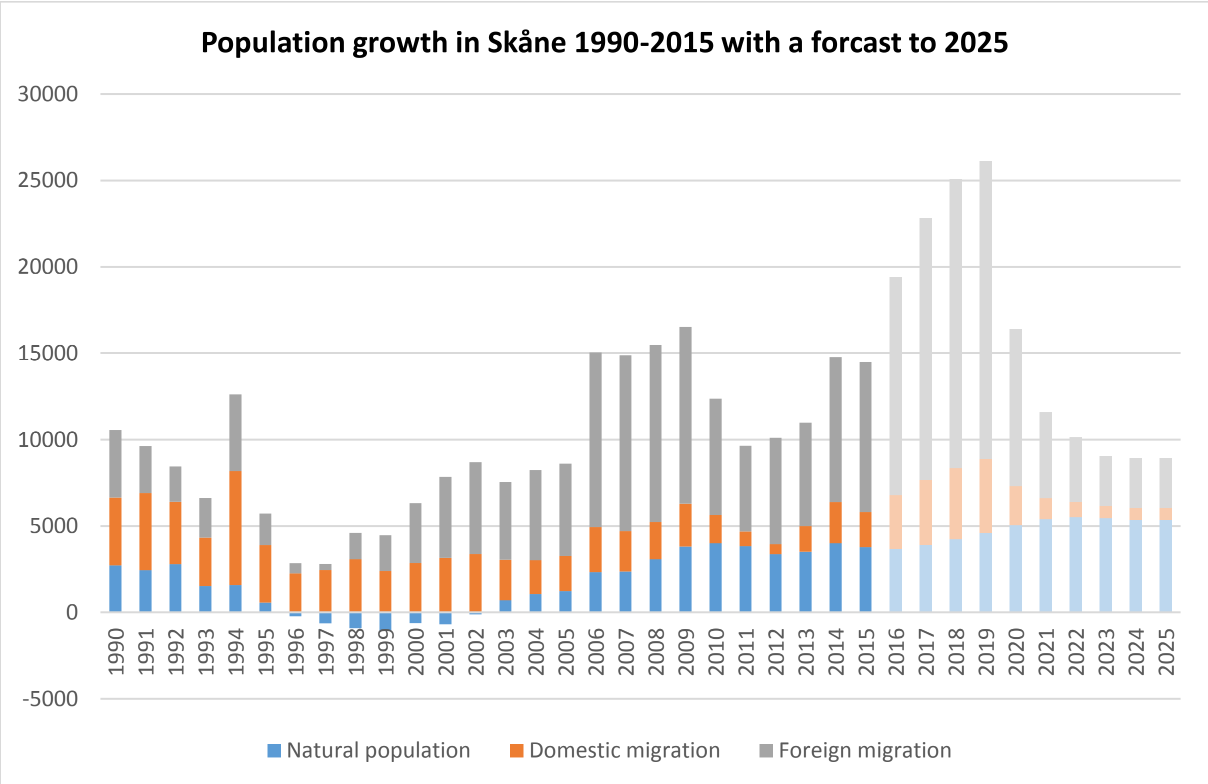
Skåne's population is growing rapidly, in 2016 the population growth hit record levels. The total population increased by 20,938 people and at the turn of the year 2016/2017, Skåne had 1,324,565 inhabitants. The increase in 2016 was historically high and was an increase of 6,219 compared to 2015, which was also a year of high population growth. In percentage terms, Skåne's population increased by 1.6 percent in 2016. Relative population growth was faster in both south-west and north-west Skåne compared to the eastern part of the county. In total, the population in south-west Skåne increased by over 11,400 and in north-west Skåne by 5,765, which corresponds to 55 and 28 percent respectively of the population growth in Skåne in 2016. The largest municipalities saw the largest population growth. For example, the population of Malmö increased by 5,920, Helsingborg by 2,638 and Lund by 1,708. As a whole, the population of Sweden increased by 144,136 inhabitants, with the largest increase in Stockholm County at 37,621 inhabitants. Skåne's population growth is in third place just behind the county of Västra Götaland, which increased by 23,101.

Population change 2005-2016



Source: Statistics Sweden

In 2016, 70 percent of the population growth in Skåne consisted of net migration of people moving from other countries. This is a consequence of the large number of people who applied for asylum in Sweden in the autumn of 2015, and they are now being granted residence permits and being registered in Skåne. The Swedish Migration Agency's processing times are between 15 and 24 months and continued high population growth is therefore expected in 2017. The net surplus in migration over the past 15 years has led to an increase in the number of people born abroad as a share of the population in Skåne, from 13 percent in 2001 to approximately 20 percent in 2016. It is important to identify the different aspects of international migration. For example, high living costs in Copenhagen created a migration wave to the south-west of Skåne and Malmö, particularly in the early years of the past decade. There is also significant migration between the other Nordic countries and the rest of the EU.



Source: Statistics Sweden and Region Skåne

Apart from the net surplus in migration, two other aspects have contributed to the population growth. Firstly, the net surplus in internal migration has steadily been just over 2,000 people from 2003 to 2016. However, it was a bit lower between 2010 and 2013, the cause of which is believed to be the overall financial situation, both globally and in Sweden. In relation to the other counties in Sweden, Skåne has a net surplus in internal migration. This is particularly clear in relation to Blekinge, Kronoberg and Kalmar, which could be considered catchment areas for Skåne. Skåne has a migration deficit in relation to Stockholm and Copenhagen, and over the past few years the numbers for Västra Götaland have been fluctuating.

Natural population growth, i.e. births exceeding deaths, has seen a constant increase due to an increasing number of births from 1999 onward. Since 2009, this increase has accounted for 3,000 - 4,000 people annually. Overall, Skåne's share of the total population of Sweden has been constant at around 13 percent.

Population growth in Skåne's four corners

The population growth in Skåne is concentrated to the bigger cities and especially the western and south-western parts. However, a few municipalities have seen a decline in population during certain years. There are other minor municipalities in the middle and eastern parts of Skåne with a small population increase. One demographic challenge is the ageing population in the smaller municipalities, particularly in the eastern part of Skåne.

There is a difference in the age structure between the western and eastern parts of Skåne, which impacts the natural population growth. In western Skåne, particularly in the south-west, the population is younger and the birth rate is high, which contributes to natural population growth. The eastern part of Skåne has almost no natural population growth whatsoever. Western Skåne has had a more favourable demographic trend, which creates good conditions for the future supply of labour.

Just over half of Skåne's population live in south-west Skåne. It is south-west Skåne that has seen the strongest growth in population of the four sub regions since the late 1980s. Migration to the area has been high in recent years, mainly from abroad but also from the rest of the country. The people moving to the region are young and the birth rate is higher than the mortality rate in the area.

A quarter of Skåne's population live in north-west Skåne. Population growth has been considerable over the past fifteen years, but around the year 2000, the sub region experienced a natural population decrease, as the mortality rate over the period was higher than the birth rate.

North-east Skåne, which has 15 percent of Skåne's population, has had the weakest relative population growth of the sub regions since the late 1980s. In the late 1990s, this sub region saw a relatively sharp decline in population, partly due to the fact that internal migration from the region was relatively high in the 1990s. This trend reversed in the early 2000s and the sub region experienced positive internal net migration. The past few years has seen negative net migration.

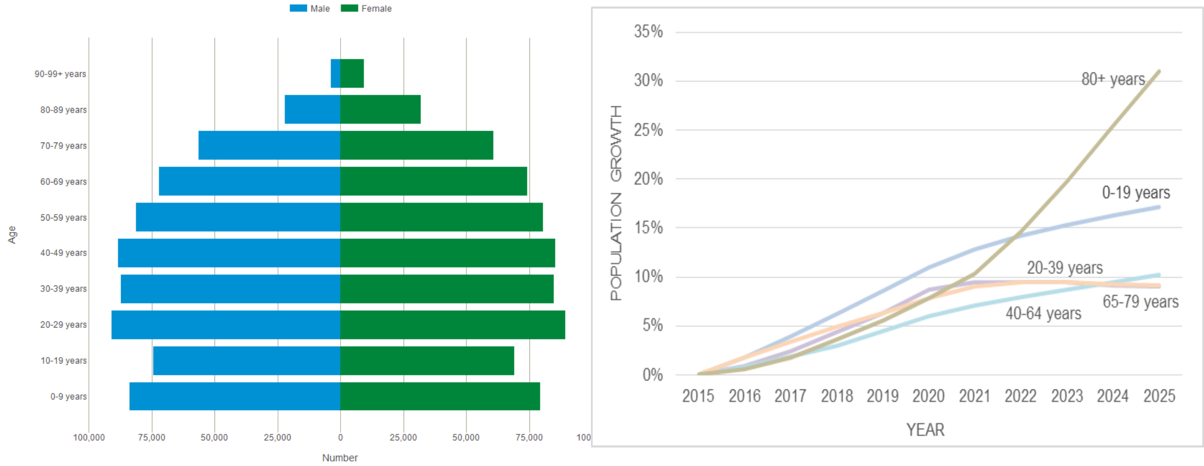
The population of south-east Skåne (which corresponds to 7.5 percent of the population of Skåne) decreased during the late 1990s, but since then, the trend has turned upwards. South-east Skåne has the oldest population of the sub regions and this is the main reason for the weak population growth. Every year, the mortality rate is higher than the birth rate. Over the past ten years however, the number of people moving there has been so high that the population has increased despite the natural population decline. The age distribution of the people moving to the area is considerably older than the other sub regions.

Population projection 2025

By 2025, Skåne is expected to have almost 1.5 million inhabitants. Over the next ten years, the age structure of Skåne will change quite significantly. Despite this, the average age is only expected to increase by less than half a year. It is primarily the number of children, young people and people aged 80 and older that are expected to increase the most until 2025. The number of people aged between 20-64 years of age is expected to increase by about 73,000 by 2025, largely due to immigration to the county, but this group is still not increasing as rapidly as the population overall.

The number of elderly people is expected to increase during the forecast period, where a significant factor is that those 80 years and older are expected to increase by over 30 percent over the forecast period. Although the number of older people is increasing, the mortality rate at different ages has declined and more people are living longer. The changing age structure of the population in Skåne will affect different sectors of the labour market, including childcare, schools and elderly care. The age structure will probably also affect the demand for different types of housing.

Population pyramid in Skåne 2016 and Projection of population growth per age group compared to 2015, Skåne



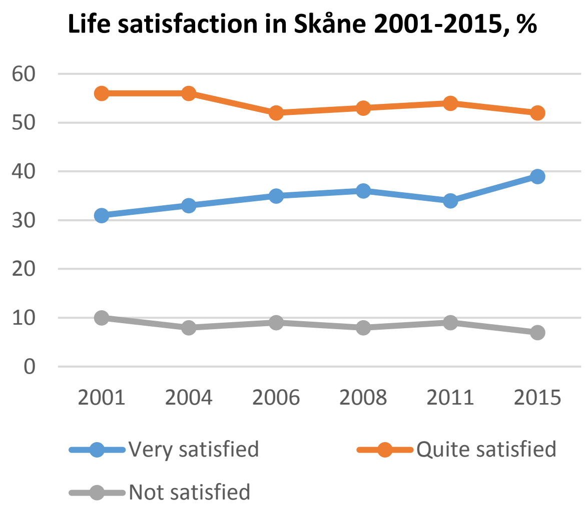
Source: The Öresund Databank and Region Skåne (2016) Skåne's population forecast 2016-2025

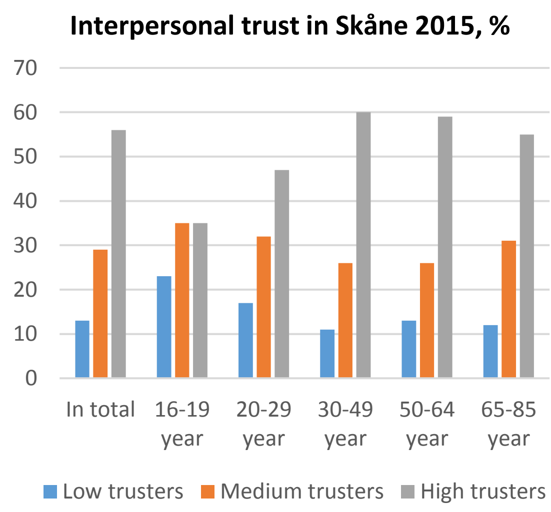
It is primarily south-west and north-west Skåne that are expected to see the strongest population growth in Skåne up until 2025, with high birth rates and migration into the area, especially from abroad. However, the number of people leaving north-west Skåne is expected to increase slightly. Population growth in both south-east and north-east Skåne will not be as strong, but the population will increase slightly, mainly due to foreign net migration.

1.3 Life satisfaction, trust and health

The general quality of life in Skåne is high. More than nine out of ten inhabitants of Skåne are very or fairly satisfied with their lives. The level of interpersonal trust is low among younger inhabitants and highest among the middle aged. Good health is important for quality of life and interpersonal trust. The state of health in Skåne is in line with the national average and more than seven out of ten inhabitants are in good self-reported health. The younger generations are in poorer mental health, and ill-health among the young is increasing over time.

Like Swedes in general, inhabitants of Skåne are satisfied with their lives. 39 percent of people in Skåne say they are very satisfied with their lives and a further 52 percent feel fairly satisfied. Over time, the proportion of people who are satisfied with life has increased from 87 percent in 2001 to 91 percent in 2015, and it is mainly the group that feels very satisfied with life that has grown. The highest level of life satisfaction is found among people with a high income, 98 percent, while the lowest level is among 16 to 19-year-olds. The level of interpersonal trust in Skåne is slightly lower compared to Sweden as a whole. In Skåne, 56 percent of people are "high trusters" and 29 percent "medium trusters". Trust increases with age and adolescents are the age group with the lowest levels of trust in other people. The higher the income and level of education, the higher the level of trust and quality of life.





Source: The SOM Institute, SOM survey in Skåne 2015 (SOM-undersökningen i Skåne 2015)

Most adults in Skåne feel well or very well according to Region Skåne's public health report in 2013. The percentage of men that feel well or very well is slightly higher than for women. As expected, there is a clear age gradient, with the highest proportion of people with a good self-reported health among the youngest inhabitants and the lowest proportion among the oldest inhabitants. The proportion of people in Skåne who feel well or very well is in line with national figures. National studies have found poorer mental health among young adults and adolescents in primary school and upper secondary school. The higher proportion of mental ill-health among young people has been evident since 2000, and is more prevalent among girls than boys.

1.4 Economic structure

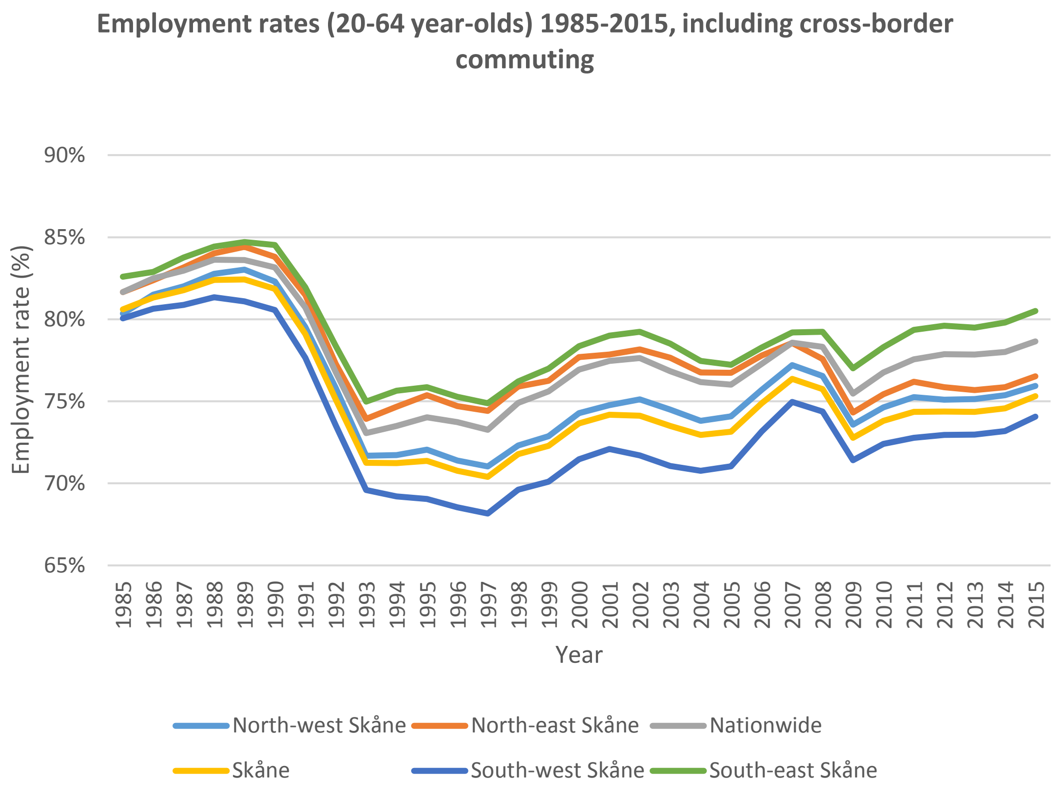
Structurally, Skåne's industry and labour market is similar to that of the rest of the nation. The region tends to be close to the national averages for unemployment and education, as well as employment by industry. However, this masks wide intra-regional disparities. The financial crises that affected Sweden in the early 90s and in 2008/09 impacted Skåne's municipalities differently due to the fact that the structure of industry varies between different parts of Skåne. The major financial crises have mainly affected the manufacturing industry, which was strongest in northern Skåne. The service-driven growth that has taken place has mainly developed around the major cities in the vicinity of universities and colleges. This section provides a general presentation of the trends that have characterised the economy and the labour market in recent decades.

Labour market

The financial crisis of the early 1990s severely impacted Skåne's labour market. Between 1990 and 1993, employment fell in Skåne and approximately 70,000 jobs were lost. The employed proportion of the population aged 20-64 fell from 82 percent to 71 percent. The recovery gained momentum in 1997/98, when both the private and the public sector began to grow simultaneously. It was not until 2005 that employment figures – in absolute numbers – reached the same level as in 1990. In connection with the financial crisis, extensive restructuring and radical changes occurred. The financial crisis mainly affected the manufacturing industry. Initially, low-productive industrial companies closed down while other companies were forced to increase their productivity in order to survive. Rising unemployment entailed increased expenditure within the public transfer systems, which triggered cuts in the public sector, which did not start to grow again until the late 1990s. One way to address extensive youth unemployment was to greatly expand higher education, which included the opening of a college in Malmö in 1998. The result was a sharp rise in the level of education, particularly among young people.

The trend since the late 1990s has been characterised by growth in business services in the broad sense (ICT, R&D, but also basic administration and cleaning services, etc.), the retail sector, the hotel and restaurant sector, the construction sector, as well as in education and health and social care. Whereas the number of people employed in the agricultural sector, forestry and the manufacturing industry has dramatically declined.

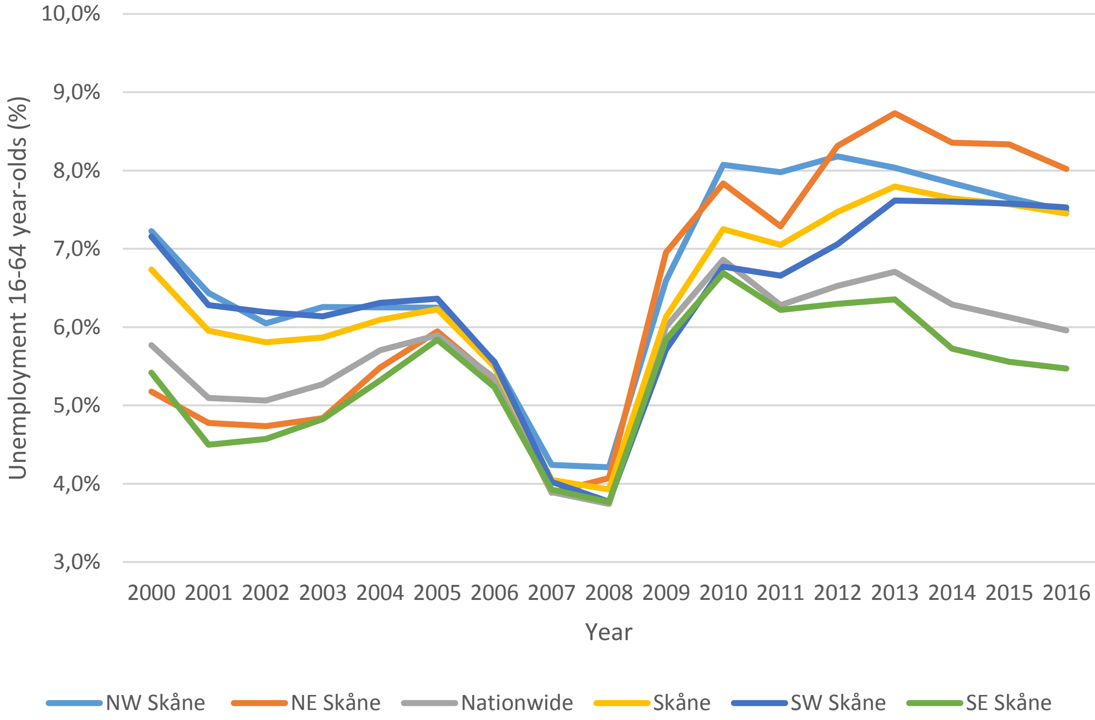
Employment in Skåne as a whole has grown rapidly in the 2000s. Between 2000 and 2015, employment rose in Skåne and approximately 79,000 jobs were created. Structural change has led to a redistribution of employment in Skåne. The financial crises of the early 90s and 2008/09 impacted the manufacturing sector the hardest, which meant that the north-east and certain parts of north-west Skåne, which was Skåne's industrial heartland, were hardest hit. Growth occurred primarily in service industries, which have other localisation requirements than the manufacturing industries that disappeared in connection with the financial crises. The result was a relocation of employment that favoured urban centres with access to highly skilled labour. This restructuring led to relatively rapid growth in employment in south-west Skåne. But even if the working age population is growing rapidly in south-west Skåne, the employment rate remains at a relatively low level.



Source: Statistics Sweden

Structural change and the financial crisis have also resulted in changes to the level of unemployment and its geographical distribution. The number of unemployed in Skåne fell sharply until the financial crisis in 2008/09, when unemployment rose from four to seven percent of the population between the ages of 16-64. The proportion of the population who were unemployed continued to rise until 2013, when nearly eight percent were unemployed or in a programme with activity support. Unemployment in Skåne has declined somewhat since then, but remains at a relatively high level. Unemployment has also been redistributed within Skåne. Before the financial crisis, unemployment was lowest in north-east and south-east Skåne, but after the financial crisis, unemployment rose sharply in the north-east sub region, where it is currently the highest. In large part, this is since the financial crisis mainly affected the manufacturing industry, which was more prevalent in northern Skåne. Unemployment in south-west Skåne has approached the average for Skåne. The unemployed in Skåne, as well as in the country as a whole, currently consist mainly of people who lack an upper secondary education, are long-term unemployed or were born abroad.

People unemployed or in a programme with activity support as a share of the population aged 16-64



Source: Statistics Sweden

A breakdown of economic sectors in Skåne

In Skåne, approximately three percent of the value added and one percent of the employment is generated in the primary sector. The secondary sector generates 27 percent of the value added and about one fifth of the employment in the region. Skåne's tertiary sector is the largest of the economic sectors. 66 percent of the value added in the region and 80 percent of the employment belong in the tertiary sector. In total for all sectors, Skåne generated SEK 442 billion in added value and approximately 522,000 were employed in the region. The main sectors generating added value are less knowledge-intensive market services (34% of total) and knowledge-intensive market services (14% of total), whereas the main sectors in terms of employment are other knowledge-intensive services (38% of total) and less knowledge-intensive market services (26% of total).

Breakdown of value added and employment by economic sector in 2014

	Value added		Employed	
Sector	**in SEK billion**	**Share of total**	**in figures**	**Share of total**
Primary (SNI 01-09)	12	3%	7,608	1%
Secondary (SNI 10-43)	119	27%	95,794	18%
Total tertiary (SNI 45-99)	292	66%	418,530	80%
Total unknown (SNI 00)	19	4%	92	0%
Total all sectors (SNI 00-99)	442	100%	522,024	100%

Source: Statistics Sweden

The data for Skåne doesn't allow comparison of value added over time. The fastest growth of employment occurred in "Other less knowledge-intensive services" followed by "Knowledge-intensive market services”. The fastest decline of employment occurred in Low-technology manufacturing.

Skåne has declining employment in all types of manufacturing and in High-tech knowledge-intensive services. The largest companies in ICT (Sony and Ericsson) have been in trouble over the past decade and the largest life science company (AstraZeneca) closed its facility in Lund in 2011. Since the financial crisis in 2008-09, the fastest growing employment in absolute numbers has been in human health and social work establishments and education, as well as in different types of business services, both knowledge-intensive and less knowledge-intensive.

Subsector dynamics in Skåne

Skåne, as well as the Western world in general, is characterised by a falling employment in the agricultural sector, as well as in the forestry and manufacturing industries, while the proportion of people employed in the service sector is rising sharply. This is partly due to an increased global division of labour, where countries such as China and other low-cost countries have taken over the production of goods, but also a to substantial increase in the level of productivity in the agricultural sector and manufacturing industry. Manufacturing has declined significantly more in terms of employment rate than in terms of reduced economic importance.

Industry and the service sector are also becoming increasingly intertwined. Activities previously carried out within industrial companies, such as transport services, marketing and administration are being hived off or purchased externally, and are thereby reclassified as being part of the service sector.

R&D staff, administrators and sales staff account for an increasingly large proportion of staff even in manufacturing companies, which can result in manufacturing companies being reclassified as service industries, such as wholesale trade or R&D.

A break in the series of the sectoral distribution of employment statistics unfortunately makes it impossible to trace the employment rates for each industry further back than 2008. The table below shows the significant impact that the financial crisis of 2008/09 (which began to affect employment in 2009) had on employment. Between 2008-2014, employment in industry fell by 19 percent. During the same period, there was significant growth in public services, the hotel and restaurant sector, real estate and business services.

Employment in Skåne in 2014, and the change from 2008-2014

Industry	Employment rate Skåne 2014	Share of employment in Skåne	Share of employment nation wide	Change 2008-2014	Growth in Skåne 2008-2014
companies in agriculture, forestry and fishing	9 422	1,8%	1,5%	-278	-2,9%
mining, quarrying, manufacturing	57 765	10,7%	12,4%	-13 678	-19,1%
energy and environmental companies	5 396	1,0%	1,1%	241	4,7%
construction industry	38 065	7,1%	7,0%	1 022	2,8%
trade	75 099	14,0%	12,4%	2 537	3,5%
transport and storage companies	27 077	5,0%	4,8%	-1 135	-4,0%
hotels and restaurants	17 597	3,3%	3,6%	3 164	21,9%
information and communication companies	17 898	3,3%	3,9%	873	5,1%
financial institutions and insurance companie	7 727	1,4%	2,0%	-215	-2,7%
real estate companies	8 849	1,6%	1,5%	848	10,6%
professional, scientific and tech.; administrat	62 482	11,6%	11,4%	4 128	7,1%
public authorities and national defence	27 093	5,0%	5,9%	2 439	9,9%
educational establishments	62 918	11,7%	10,7%	6 577	11,7%
human health and social work establishment	91 904	17,1%	16,6%	6 207	7,2%
arts, entertainment and recreation; other ser	23 566	4,4%	4,4%	2 570	12,2%
okänt	5 407	1,0%	0,9%	51	1,0%

Source: Statistics Sweden (RAMS/raps-ris)

Company size in the private and public sector

63 percent of employees in Skåne work within the private sector. Organisations with 10-49 employees have the largest share of the region's total employees, followed by organisations with 50-199 employees. About one fifth of employees work in organisation with 1-9 employees.

Employment by private and public companies according to company size in 2014

	Employment by company size based on the number of employees					
Sector	**0**	**1-9**	**10-49**	**50-199**	**200-**	**Total**
Private sector	0	90,629	106,986	78,666	51,652	327,933
Public sector	0	16,133	56,489	65,588	55,789	193,999
Unknown	0	92	0	0	0	92
Total category	0	106,854	163,475	144,254	107,441	522,024
Category's share of total	0%	20%	31%	28%	21%	100%

Source: Statistics Sweden

The 5 largest employers in the private sector in Skåne, 2015

Rank	**Company**	**Industry**	**Employees**
1	PEAB Sweden	Construction	2,625
2	Nobina Sweden	Transport	1,725
3	Peab Anläggning	Construction	1,575
4	Tetra Pak Packaging Solutions	Packaging	1,375
5	Attendo Sweden	Healthcare and care sector	1,325

Source: Statistics Sweden

The largest privately owned employer in Skåne is PEAB (a construction company) followed by Nobina (operates buses and trains), Tetra Pak (packaging) and Attendo (social services). Skåne has a growing number of high-tech companies but few of them has managed to grow and become large companies. Most of the large companies in the region operate in social services, transportation, low-tech business services, trade and construction. But there are a few examples of large ICT companies (Sony, Ericsson, Axis, Qlick Tech) and large manufacturing companies such as Tetra Pak, Sandvik and Trelleborg AB.

International trade to and from Skåne

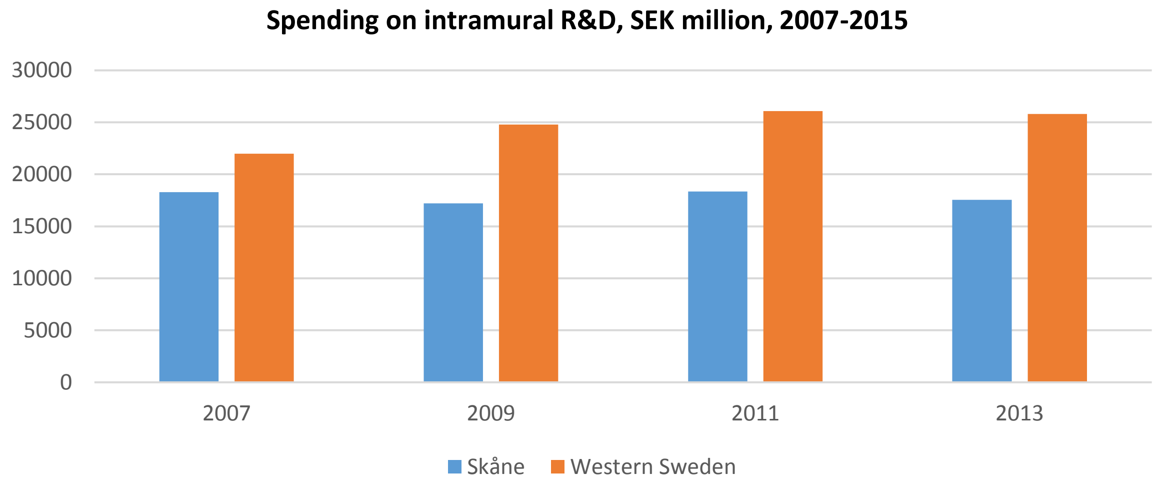
The export of goods from Skåne is low compared to Western Sweden and Stockholm. This is due to an industry structure that is more focused on food, which mainly has a domestic market. There are some large manufacturing firms that have a global market. One of the most important companies is probably TetraPak, which has high levels of export in machinery and papers for packaging. The region has a relatively small manufacturing industry that is specialised on services. The most important export countries are the neighbouring countries of Norway, Germany, Denmark and Finland, as well as the United States. Unfortunately, it is not possible to measure service exports at the regional level. The import of goods to Skåne is less concentrated to the neighbouring countries than the export. The most important import countries are Germany, Denmark, China, the Netherlands and the UK.

Goods exports from Skåne – top 10 destinations 2015		
Country	**Goods exports, SEK billion**	**Share of goods export**
Norway	12.2	12.9%
Germany	12.2	12.8%
Denmark	9.7	10.3%
Finland	6.1	6.4%
USA	5.4	5.7%
China	4.2	4.5%
United Kingdom	4.1	4.3%
Poland	3.7	3.9%
France	3.3	3.4%
Rest of the world	33.9	35.8%
Total	94.7	100.0%

Source: Statistics Sweden

Research and Development in Skåne

In 2013, the total spending on intramural R&D was SEK 43 billion, accounting for 35 percent of total R&D expenditure in Sweden. R&D investment in Skåne declined from 2007-2013, particularly in the private sector. No regional R&D statistics broken down by industry were published, but a likely explanation is the cutbacks in telecommunications and pharmaceutical research that were made by major companies in Skåne.



Source: Statistics Sweden

Spending on R&D in Skåne, share per sector, 2007-2013				
	2007	**2009**	**2011**	**2013**
Business	78.9	73.4	72.0	66.7
Regions and municipalities	1.5	1.8	2.7	3.1
Private non-profit sector	0.0	0.0	0.0	0.0
Government	0.1	0.2	0.0	0.0

Higher Education	19.5	24.6	25.3	30.1

Source: Statistics Sweden

Clusters in Skåne

The region of Skåne has a large and varied cluster structure within, for example, life science, logistics and packaging, information technology (ICT), new media and the creative industries, the food industry as well as maritime technology and CleanTech. The clusters are primarily located in the South-western part of Skåne and have strong links with research at the University of Lund, Malmö University and SLU (the Swedish University of Agricultural Sciences). The food industry is also strongly linked to a development node in the North-eastern part of Skåne, connected to Kristianstad and Kristianstad University.

To provide support and help to both large companies and SMEs within these clusters, several cluster organisations and cluster initiatives have been set up. PackBridge, Mobile Health, Media Evolution, Skåne Food Innovation Network, Swedish Maritime Technology Forum, Sustainable Business Hub, Resilient Regions Association and finally IUC South, which promotes the reindustrialisation process). Several of these cluster organisations have both national and international reach and ambitions. Food Academy – based on a long history of collaboration to enhance competitiveness in the food sector (one of the region's strengths). Became part of Vinnova Vinnväxt programme in 2003, which secured 10 years of national funding with a view to developing a strong innovation environment, achieving an international position for the region’s food.

Medicon Valley Alliance – a cluster initiative for Life Sciences in Sweden and Denmark that aims to make the Medicon Valley region an attractive destination for talent in Life Sciences. It has about 250 member companies with around 140,000 employees overall.

Media Evolution – whose overall objective is for southern Sweden to be recognized globally as a leading innovation and production environment for motion pictures, computer games, television, internet and mobile platforms. It currently has around 350 members, of which 100 companies have their premises in the office building operated by the cluster.

Mobile Heights – focuses on wireless communication and mobile services (an established regional area of strength in terms of both know-how and companies) with the aim of becoming a world leader in research, innovation and entrepreneurship in the field of mobile communications.

Packbridge – working to develop next-generation packaging solutions. It currently has over 200 member companies in the packaging and logistics industry.

Sustainable Business Hub – a network of environmental technology companies in southern Sweden that aims to increase business opportunities in the domestic and export markets, as well as creating interfaces with the Academy. The network consists of approximately 100 members. In 2016, the cluster was part of the Vinnova Vinnväxt Programme.

Resilient Regions Association – a neutral arena where industry, academia, municipalities and government agencies come together to solve regional challenges, and to shape the robust features and flows to better overcome and recover from societal stresses.

IDC South – an industrial cluster and meeting place for industrial development, growth and collaboration aiming to strengthen the industrial competitiveness of companies. They have been around since 1997, but only recently became part of a more integrated part of the cluster and the regional innovation system.

The regional cluster development programme 2017-2021 aims to strengthen business development by developing the cluster initiative’s role in providing open innovation arenas related to the three innovation areas in Skåne's innovation strategy, An International Innovation Strategy for Skåne: Smart materials, Smart Sustainable Cities and Personal Health, as well as the vision of Skåne as Europe's most innovative region in 2020.

This cluster structure and the development of different cluster initiatives also aid the regional development strategies and the three focus areas of Smart and Sustainable Cities, Smart Materials and Personal Health. The investments in the MAX IV and ESS research facilities in Skåne lay the foundation for a continued position of strength within the three focus areas. The region has seen a transformation from larger companies towards SMEs and entrepreneurial activities but there is still a varied business structure with the establishment of several R&D departments in larger companies.

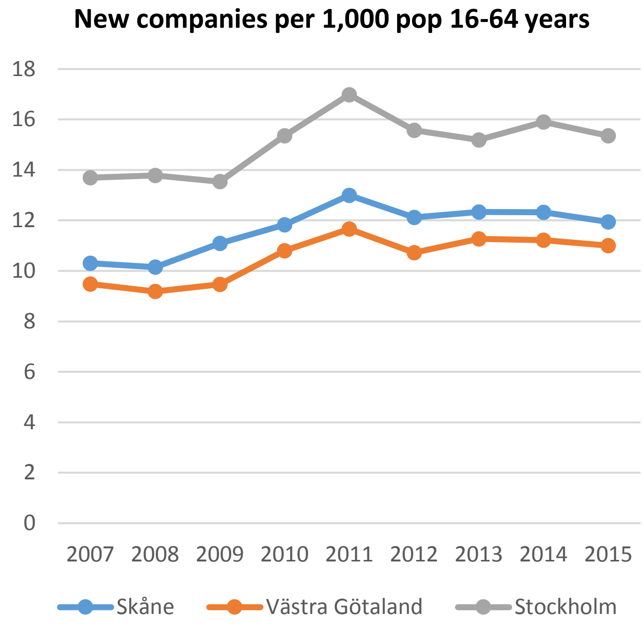
The greater region, which in an industrial sense includes Skåne, Copenhagen and part of the Island of Zealand, contains companies within life science that form the largest life science cluster in the Nordic region with over 35,000 employees in companies such as Novo Nordisk, Baxter/Gambro, Camurus and Alligator Bioscience. Within the logistics and packaging cluster with its full value chain perspective we have, for example, Tetra Pak, Ecolean and Smurfit Kappa. The food industry includes companies such as Orkla foods, Lantmännen and Skåne mejerier. The strong telecommunications and ICT cluster has seen considerable transformation over the past few years, and has dedicated highly qualified skills towards new development areas such as connected health and game development as well as within industrial areas, represented by companies such as Bosch, Volvo cars and Assa Abloy. Furthermore, the region has strong clusters within CleanTech and Maritime Technology.

The region has seen significant transformation over the past few years, first within life Science, then telecommunications and ICT, followed more recently by the food industry. This transformation mainly consists of the withdrawing from or down-sizing large global company facilities, leading to a rise in SME capacity. Nevertheless, this has put considerable strain on the region in terms of employment, skill development, etc.

Entrepreneurship

The number of start-up companies in Skåne is high. Skåne has the third highest rate of start-ups in the country in proportion to its population. Stockholm County always has the highest number of start-ups, commonly followed by a somewhat smaller county where a slight increase in the absolute number of companies can result in a high per capita level of new businesses. Just under a third of all new businesses have only women in the management team.

In 2015, the number of new companies per 1,000 inhabitants aged between 16-64 in Skåne amounted to 11.9 compared to 17.6 companies in Stockholm and 11.0 in Västra Götaland. For Sweden as a whole, the number of companies per 1,000 inhabitants was 11.5

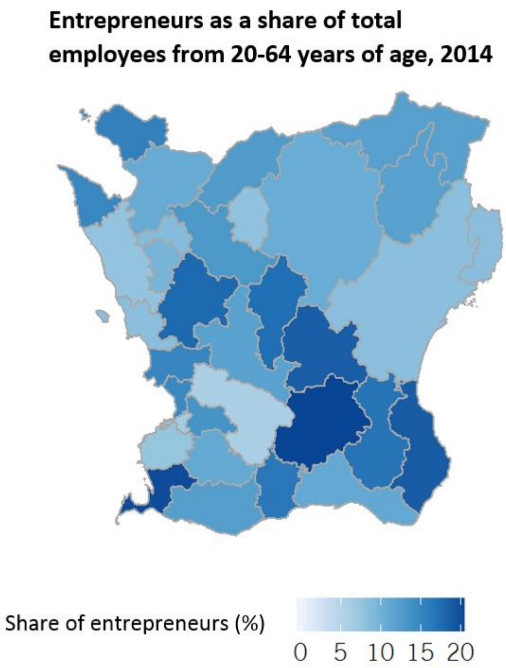


Source: Growth Analysis

The number of start-ups is commonly higher in larger cities and in relatively affluent municipalities in close proximity to larger cities. In 2015, the highest number of business start-ups per 1,000 inhabitants aged between 16-64 was in Båstad, where the number was 18.6 (146 companies). It was followed by Vellinge with 17.4 (342 companies), Höganäs with 15.7 (223 companies), Lomma with 14.9 (192 companies) and Simrishamn with 14.1 (145 companies).

Municipalities outside the area of influence of the major cities, often industrial in character, tend to have small numbers of start-ups. The lowest number of start-ups per 1,000 inhabitants was in Bromölla, where the number was 7.9 (57 companies). It was followed by Perstorp with 8.1 (35 companies), Osby with 8.6 (64 companies), Trelleborg with 8.6 (225 companies) and Östra Göinge with 8.8 (73 companies). Start-ups are strongly linked to levels of education and income.

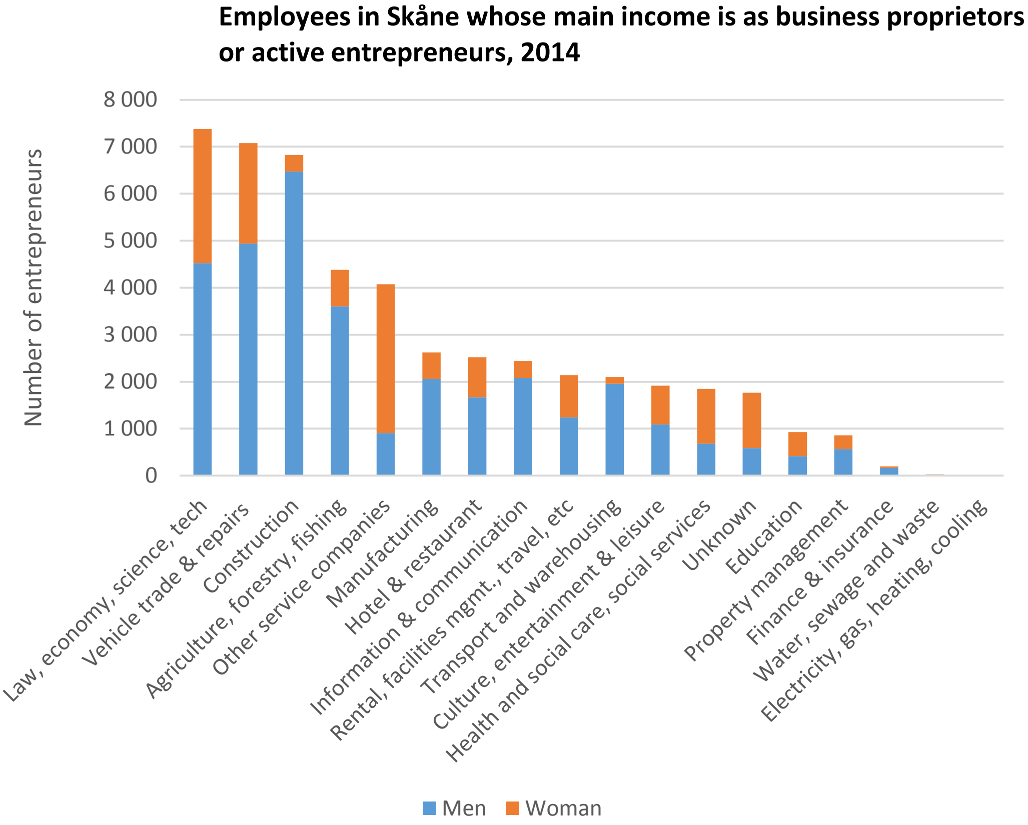
It should be noted that companies set up in and around the major cities, to a greater extent than in the more peripheral municipalities, are side-line businesses, while companies that operate in rural areas often constitute the owners' main source of income.



Source: Statistics Sweden and Growth Analysis

Many companies started as a side-line business and are not the main source of income for the owner. Statistics Sweden's register-based labour market statistics contain data about whether the main source of income for the working population is as an employee of a company, as the sole proprietor of a business or as a partner in a private limited company (referred to here as "active entrepreneurs").

There are significant differences regarding the industries in which women and men decide to start a business. Business start-ups in traditionally male-dominated industries such as “Agriculture” and “Construction” are largely dominated by companies owned by men, while industries under the somewhat vague designation “Other service companies” are predominantly run by women. The reason for the latter is that hair salons, which are predominantly run by women, can be found under "Other service companies".



Source: Statistics Sweden

Comments: Values of less than five people can differ slightly from the actual values because of privacy protocols.

In Skåne, in 2014, there were a total of 49,214 people whose main income was derived from running their own business. They accounted for 9.3 percent of the working population. 32.8 percent of all active business owners were women and 67.2 percent were men.

Previously it was noted that the number of start-ups were highest in urban municipalities and their surrounding municipalities. If instead we study the share of the working population who actually derive their main income from business ownership, a slightly different pattern emerges. The largest proportion of business owners as a share of the working population can be found in municipalities outside the major cities and their area of influence. The largest proportion of business owners were in Sjöbo, where the proportion of business owners among those gainfully employed, aged 20-64, was

20.6 percent. It was followed by Vellinge with 20.1 percent, Simrishamn with 18.8 percent, Hörby with 18.6 percent and Svalöv where it was 17.8 percent. The lowest proportion of business owners in the working population were in Lund, where the proportion of business owners among those gainfully employed, aged 20-64, was 5.7 percent. It was followed by Burlöv with 6.3 percent, Malmö with 7.4 percent, Helsingborg with 7.6 percent and Perstorp where it was 7.8 percent.

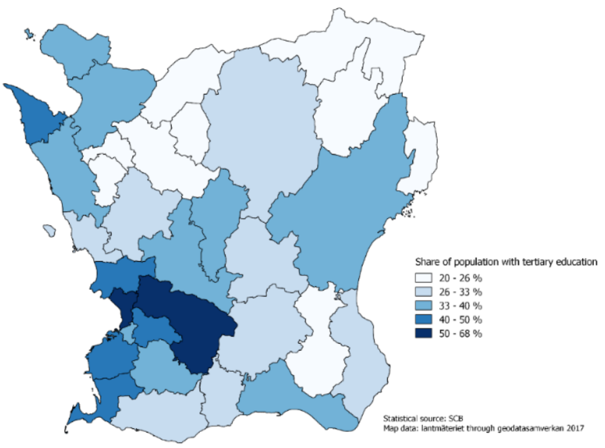
1.5 Education, human capital and inclusive development

The image of Skåne is both contradictory and multifaceted. A large percentage are university educated, while many lack upper secondary qualifications. Skåne has the lowest employment rate in Sweden but also many industries that are crying out for labour. There are considerable social inequalities, but labour growth is high. The complex image of Skåne is disconcerting, but it also inspires hope for the future.

Education

Every child has equal access to free education in Sweden. School is compulsory up to ninth grade (Elementary School). Upper secondary school is optional, and anyone that has completed upper secondary school may apply for post-secondary education. Skåne has one of the highest education levels in Sweden. However, there are large differences between municipalities in Skåne. For example, less than five percent of all people from 35-44 years old in Lomma, Vellinge and Lund had only attained secondary education in 2015. On the other end of the scale, in Perstorp, Bjuv and Landskrona, they accounted for at least 15 percent of the age group. This is significant, since there are very few jobs available in the Swedish labour market for low skilled workers.

Share of population with tertiary education in



Source: Statistics Sweden

In the early 1990s, Sweden was affected by a deep economic crisis with rapidly declining employment and widespread unemployment. One way to tackle extensive unemployment was to significantly expand higher education. In 2015, around 56 percent of the female population and 40 percent of the male population from 24-34 years of age had a tertiary education. This trend was mainly driven by an expansion of the university colleges in Kristianstad and Malmö, but Lund University, the second oldest university in Sweden, still has the highest number of students in Skåne.

Number of students in the autumn term					
University	**1995**	**2000**	**2005**	**2010**	**2015**
Kristianstad University	3,228	5,810	6,357	7,871	8,106
Lund University	28,331	24,849	28,811	31,439	29,831
Malmö University		9,574	12,611	15,045	14,999

Source: Swedish Higher Education Authority

In 2014/15, approximately 6,600 students from abroad were enrolled in higher education and most of them were studying at Lund University. The number of students from outside Europe has fallen significantly since 2011, when Sweden introduced tuition fees for students from outside the EU/EES.

Employment

Skåne has the lowest employment rate of all Swedish counties. It was 72.4 percent among those from 20-64 years old in 2014, compared to 77.3 percent for Sweden as a whole. It is especially low in Lund, Malmö, Perstorp and Landskrona, where less than 70 percent of all those from 20-64 years old where employed, according to statistics from SCB. However, the official statistics from SCB does not include the over 15,000 people from 20-64 years of age that were employed in Denmark but lived in Skåne in 2014. After adjusting for this, Skåne's employment rate increases by 1.9 percent to 74.3 percent and Malmö's employment rate increases by 4.2 percent, from 64.8 percent to 69.0 percent. The low employment rate among 20-64 year olds in Lund is mostly due to the reason that Lund is a student town, with many young adults not participating in the labour market.

According to the education forecast for Skåne 2016-2025, there will be a severe shortage of staff in healthcare (medical doctors, nurses), staff with a secondary education in geriatric care and all kinds of teachers, as well as staff with technical skills in both blue and white-collar jobs and workers in the construction industry. There will be low demand for people with only primary education and people with an education in journalism or the humanities.

Skills mismatch, 2013		
HDI	**Skåne**	**Sweden**
Native-born	74.6	73.7
The Nordic countries excluding Sweden	70.4	68.4
Countries with high HDI	68.4	66.8
Countries with low HDI	63.2	60.8

Source: Region Skåne (2016) Skåne 2025 Utbildnings och arbetsmarknadsprognos

Skåne has a brain drain in relation to Stockholm. More young people with a tertiary education move out than move in. This reflects a gap in terms of competitiveness between Skåne and Stockholm.

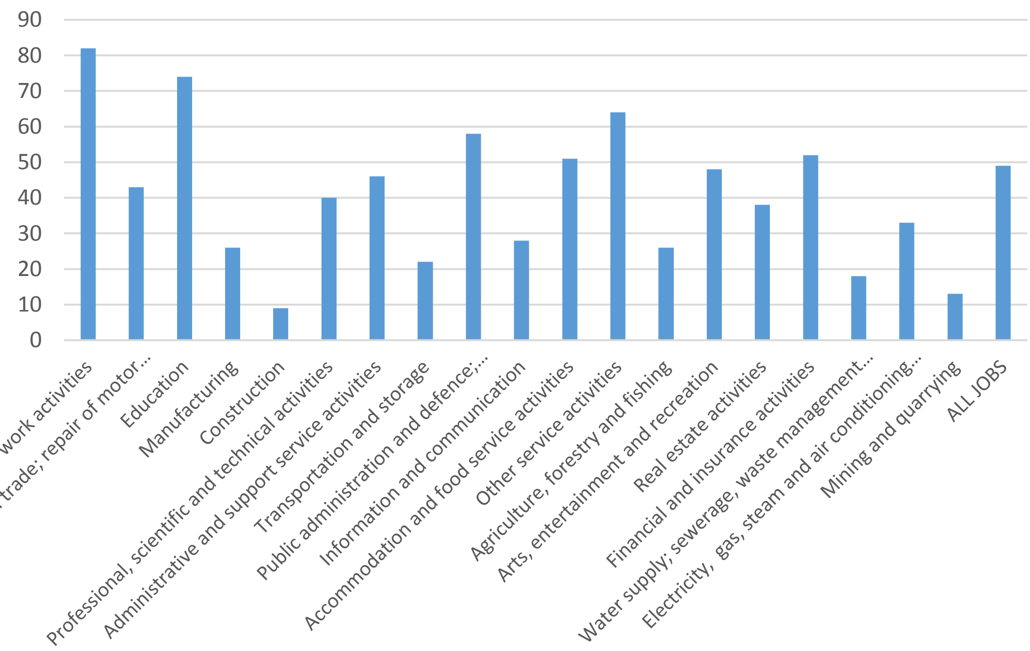
In 2013, approximately 79 percent of those gainfully employed worked in the service sector. The proportion of people working in the service sector is expected to increase to 82 percent by 2025. Employment is expected to increase relatively strongly, in domestic services (schools, healthcare, hotels and restaurants, etc.) by approximately 35,000 people, and in producer services by approximately 13,000 people. However, employment in the construction industry is expected to be somewhat weaker, and the manufacturing industry is expected to continue to shrink. For those with an industrial qualification, supply is expected to shrink more sharply than demand. The same applies for qualified vehicle technology graduates. For graduates from upper-secondary school engineering programmes, the shortage is estimated to be significant. For those with a Master of Science in Engineering or a Bachelor of Engineering, it is estimated that supply and demand will develop in step with one another other, with the exception of certain specialisations.

The demand for graduates with an upper-secondary health and social care qualification is expected to increase substantially for the period until 2025. The increase is due to a growing population and a growing proportion of elderly people in the population. Despite a moderate retirement rate, supply is estimated to decline somewhat, which risks creating a shortage overall. The demand for nurses with specialist training is estimated to increase. A growing population and high retirement rates mean that the current shortage of nurses with specialist training is at risk of intensifying.

In a comparison of forecast outcomes for Skåne and the other two metropolitan regions as well as the four regions in Eastern Central Sweden, it appears that shortages can be expected within several similar training programmes, which may lead to increased competition for graduates from these training programmes. It shows an increased need to intensify efforts to promote training and skills development at the regional level.

In Skåne, as in the rest of Sweden, the labour market is still divided between men and women. In health and social work, over 80 percent of employees are women. This should be compared to the construction industry in which more than 90 percent are men. Since Skåne is expected to have a general shortage of staff in health services and social care, being able to attract men to the sector will be crucial in order to meet demand.

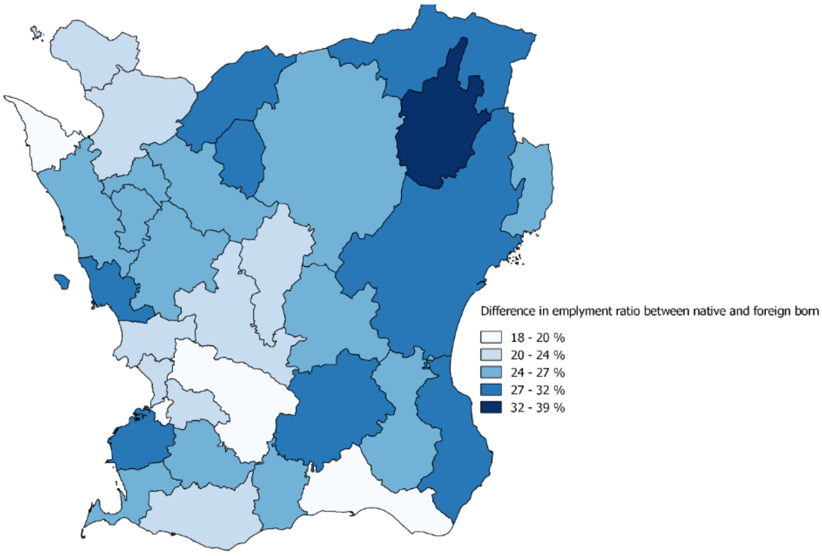
Female share of employment by industry from largest to smallest



Source: Statistics Sweden

A large share of the population in Malmö and Landskrona is foreign born, and the employment rate among those from 20-64 years old in this group is very low; 47 percent and 49 percent respectively (without adjusting for commuters to Denmark). Many foreign-born adults lack the qualifications that employers are looking for, some need to validate their educational background in order to enter the job market, and others are newly arrived refugees or migrants without sufficient proficiency in the Swedish language.

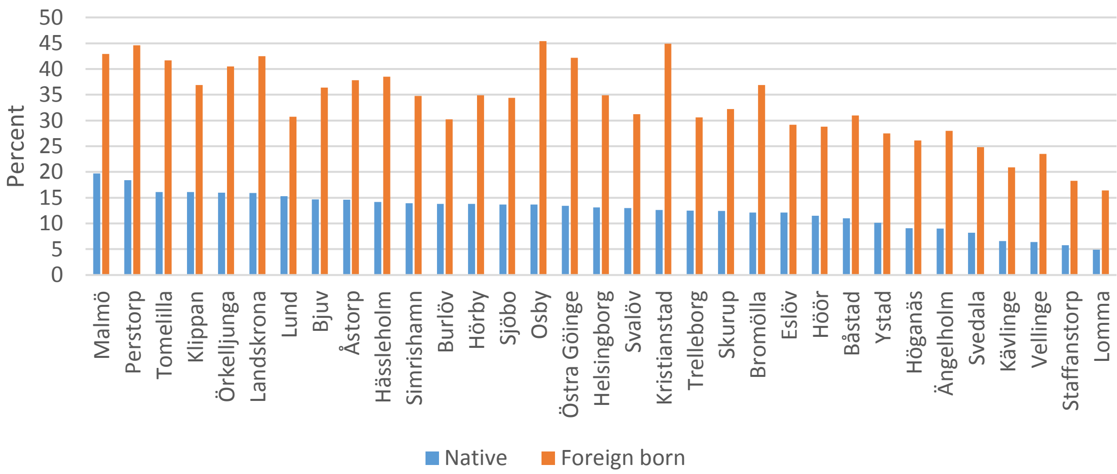
Difference in employment rates between native and foreign born, 2014



Source: Statistics Sweden

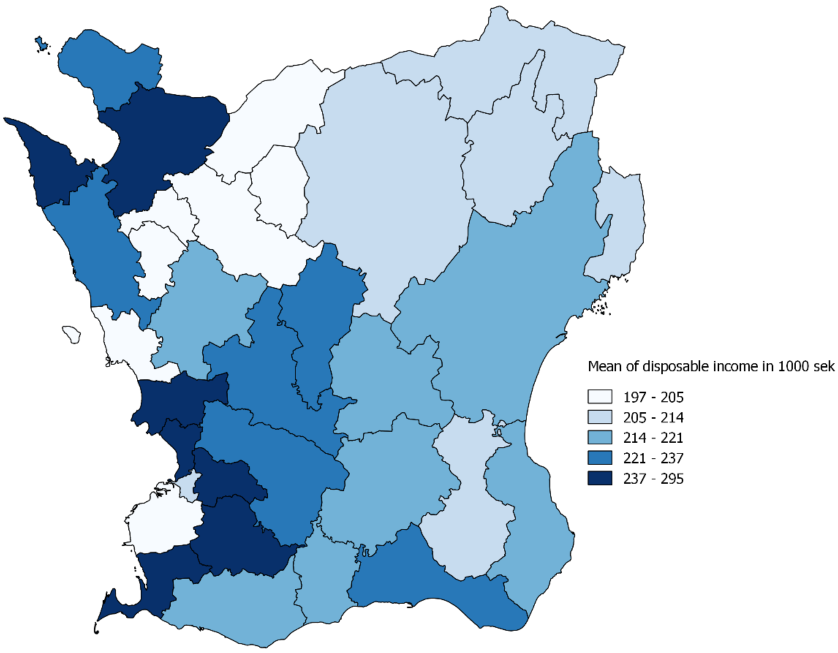
Malmö, Perstorp and Landskrona have the lowest median disposable income per consumption unit (individuals) among all municipalities in Skåne, followed by a number of municipalities in north-east Skåne, such as Örkelljunga, Åstorp and Bjuv. Also, Malmö has the third largest income disparity in Skåne, while most other municipalities with low employment rates and low median incomes show lower income disparities than the county average.

Individuals in households with low equivalised disposable income, 2014



Source: Statistics Sweden

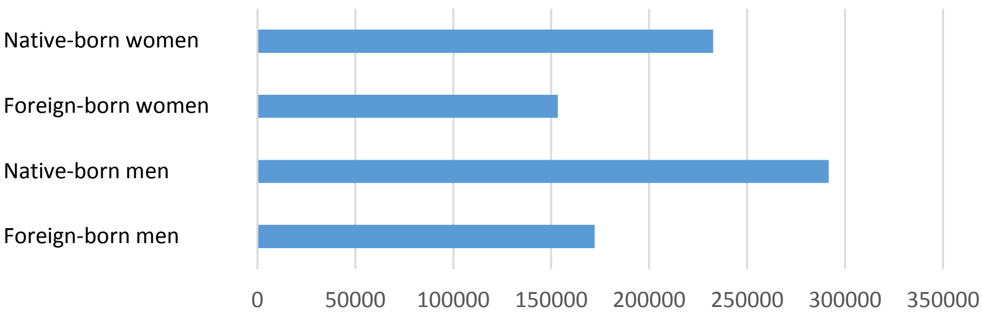
Mean disposable income (individual) 2014, in thousand SEK



Source: Statistics Sweden

Skåne has the highest level of poverty among all counties in Sweden. 18 percent of all individuals have an equalized disposable income below 60 percent of the median for all of Sweden. This can be compared to 10 percent of all individuals in Halland, the lowest share in Sweden, and 14 percent in Västra Götaland. However, as mentioned above, this not include the more than 14,000 people from 20-64 years of age who were employed in Denmark but lived in Skåne.

Mean income in SEK for 20-64 year-olds in Skåne 2014



Source: Statistics Sweden

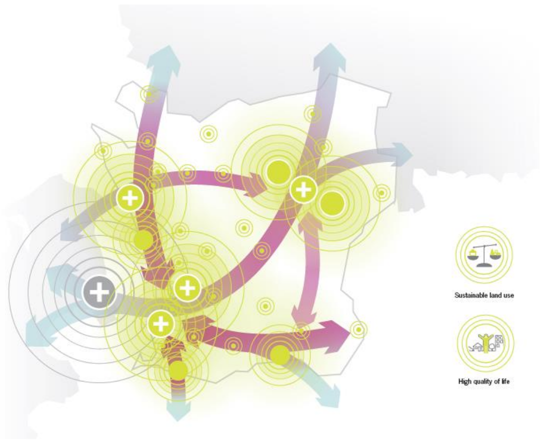
There are several social policy challenges in Skåne, especially with the recent focus on immigrant settlement/integration. This challenge is closely connected to, e.g. providing housing, education and training, as well as matching people's skills to labour market needs. Particularly worrying is the low employment rate for the foreign born and the fact that, for many of them, it takes several years to get established in the labour market. The challenges of immigrant settlement/integration affect urban areas to a greater extent than rural areas, mainly since migrants predominantly settle in the larger cities.

1.6 Accessibility & transport

Skåne is a densely populated and polycentric region. The population density of Skåne, paired with the polycentric urban structure, provides very good conditions for geographic accessibility in the labour market. The largest commuter flows are found between Malmö and Lund and vice versa, as well as between the suburbs and Malmö. There are approximately 15,000 people commuting daily between Skåne and eastern Denmark

Opportunities to live and work in Skåne

Skåne's polycentrism, with short distances between a number of towns, localities and villages, provides many people with a high quality of life. Skåne's polycentrism is utilised by the hubs growing strong with the support of surrounding areas, making it easier to move and work across boundaries. This polycentric structure in Skåne is unique in Sweden. Skåne is comprised of several larger localities that combine to drive development. A study of Skåne's polycentric urban structure led to the definition and identification of certain growth engines and regional hubs. Malmö, Lund and Helsingborg are all growth engines with a large share of the job opportunities in Skåne, as well as being centres of research and development. A regional hub has been defined as a locality of central importance to its surrounding area, with criteria such as a relatively large population, broad trade and industry and a positive number of net commuters. Currently, there are eight regional hubs in Skåne. In addition to the growth engines, the following cities are defined as regional hubs: Trelleborg, Ystad, Landskrona, Kristianstad and Hässleholm, where the two latter have the potential to combine and become a growth engine. A good and efficient transport system between the growth engines, regional hubs and the surrounding areas can strengthen Skåne and provide a high quality of life for its inhabitants.



Transport network

The transport system in Skåne is well developed and contribute to an integrated region. The basic transport infrastructure in Skåne is displayed on the map. There are five international E roads, motorways, through Skåne: the E4, E6, E20, E22 and E65. The main railway lines in Skåne are the Southern main line to Stockholm, the west-coast line to Gothenburg and the Öresund line to Copenhagen. There are currently 71 active train stations in the region. There are four main passenger airports connecting Skåne to Sweden and the rest of the world: Helsingborg-Ängelholm airport, Kristianstad airport, Malmö airport and Copenhagen airport, where the latter is the largest airport in the Nordic region. The Öresund bridge opened in 2000 and is an important bridge connecting Malmö to Copenhagen and further onwards to Europe.

Basic infrastructure system in Skåne

Skåne is a northern European hub. A large part of Sweden's and Scandinavia's freight flow passes through Skåne by train, truck or ship, which contributes to congestion problems and environmental pressure. Transit transports in Skåne continue to central Sweden, Norway and most of the European Continent, primarily Denmark, Germany, Poland and north-western Europe. Most of the transports through Skåne are distributed between the Öresund Bridge and the ports in Malmö, Trelleborg, Ystad and Helsingborg, as well as in Landskrona and Åhus.

Commuting in Skåne

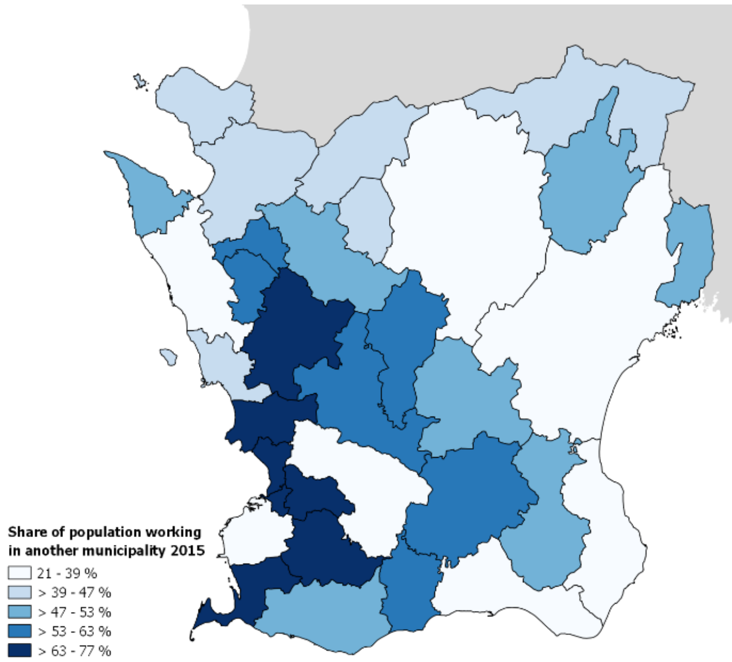
Approximately 95 percent of the gainfully employed in Skåne lived and worked in Skåne in 2015. Skåne has a negative net commuter flow, where 30,630 commuters leave Skåne daily to work in another county, and 19,798 commuters enter Skåne daily to work there.

The ten largest commuter flows in Skåne 2014
Source: Statistics Sweden

Municipality of residence	Municipality of work	Commuters
Malmö	Lund	10,858
Lund	Malmö	9,769
Vellinge	Malmö	7,100
Trelleborg	Malmö	5,301
Svedala	Malmö	4,558
Lomma	Malmö	3,510
Staffanstorp	Malmö	3,489
Kävlinge	Lund	3,417
Höganäs	Helsingborg	3,402
Kävlinge	Malmö	3,257

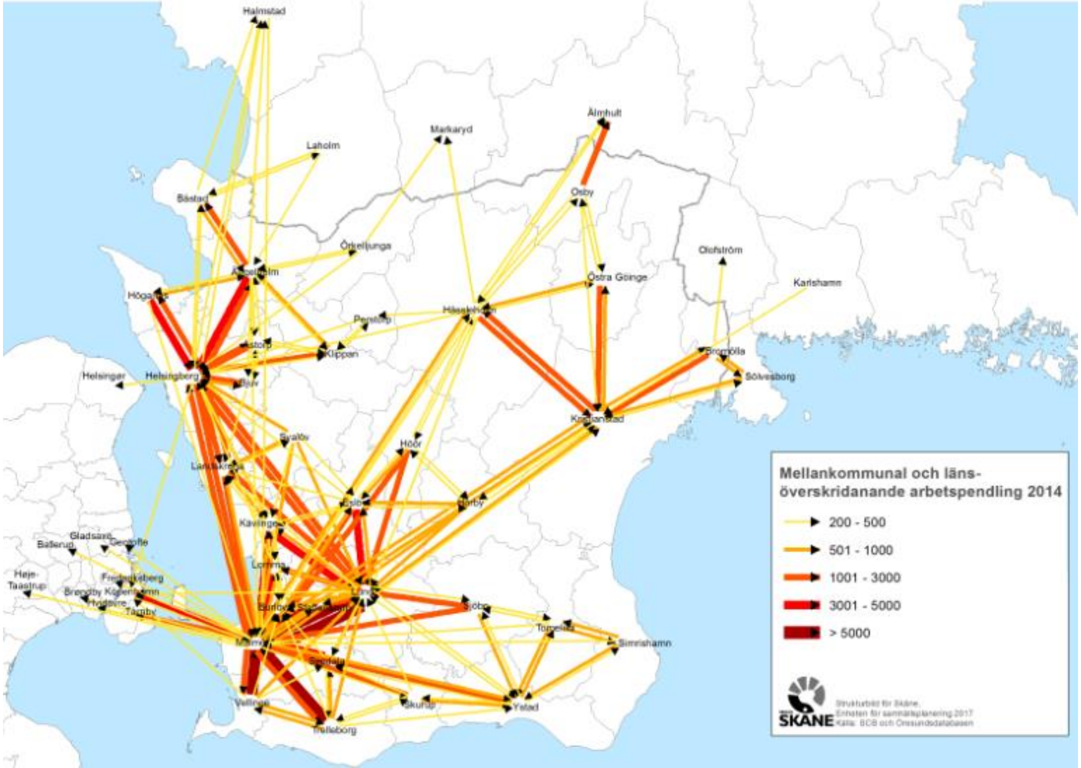
Commuter flows are increasing in Skåne. In many surrounding municipalities to Malmö, Lund and Helsingborg, between 63 and 77 percent of the employed inhabitants are commuting out from their residential municipality for work. In 16 of Skåne's 33 municipalities, more than 50 percent of the working population are commuting to another municipality for work. The largest commuter flows in Skåne are between the growth engines Malmö, Lund and Helsingborg and from the suburbs to the largest cities. Commuting across Öresund has increased since the Öresund Bridge opened, from 3,000 in 2000 to nearly 20,000 people in 2008. Between 2008 and 2014, the Öresund Commuter flow decreased to just under 15,000 commuters per day.

Share of population working in another municipality in 2015



Source: Statistics Sweden

Inter-municipal and cross-county commuting 2014 in Skåne



Source: SCB and Region Skåne

Commuting times in Skåne

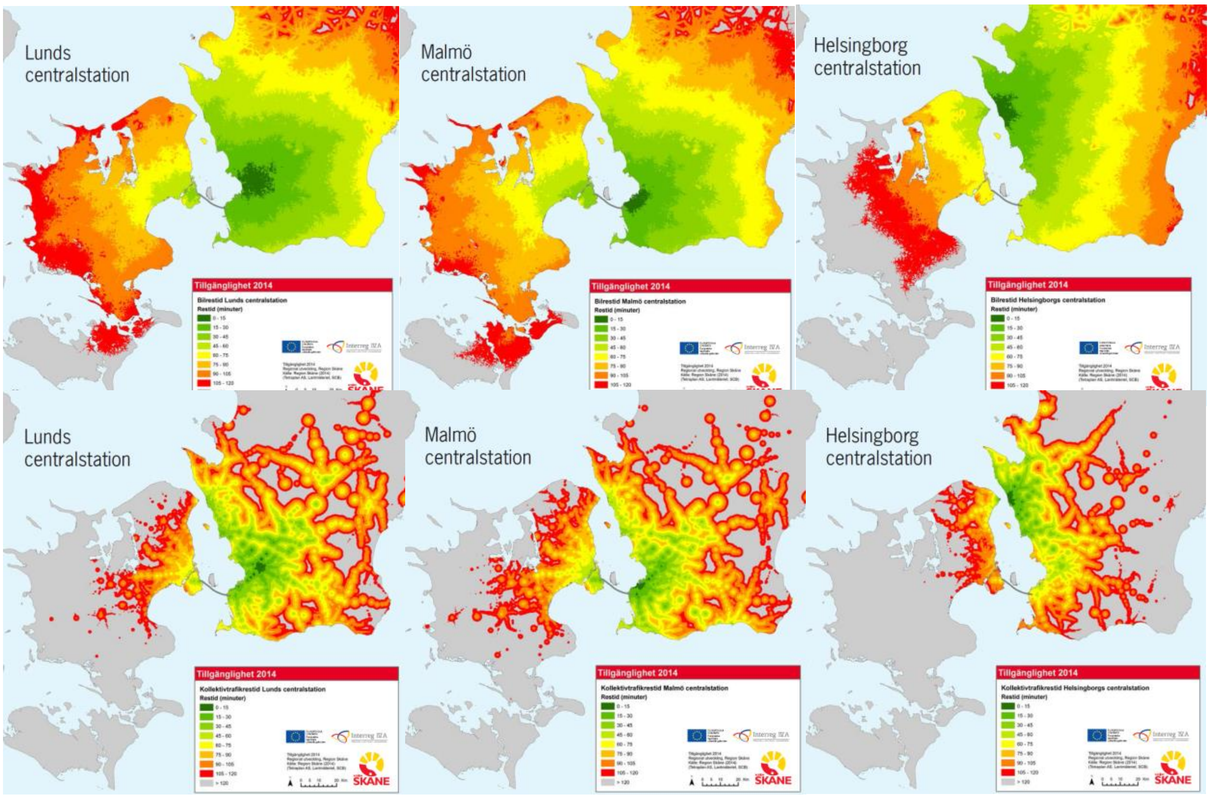
In 2013, the total number of jobs in Skåne amounted to 560,530. Access to these jobs varies greatly, depending on where in Skåne you reside. Approximately 110,000 jobs are accessible within 45 minutes by the average Skåne inhabitant through public transport. This represents about 20 percent of all jobs in Skåne. From the area around Lund Central Station, approximately 310,000, or approximately 56 percent of Skåne's jobs, can be reached. This means that the largest number of the region's jobs are accessible from this location.

Many of the county's jobs are located in Malmö, Lund and Helsingborg. As a result, a large proportion of Skåne's jobs are accessible from places that are within 45 minutes' travel time from one of these cities. Lund's high level of accessibility is an effect of both Malmö's and Helsingborg's labour markets being within reach, as well as several of the other regional centres, in addition to all the workplaces that are already located in Lund.

Therefore, an important factor for any location in Skåne is access to one or more of the regional centres, with emphasis on the regional growth engines of Malmö, Lund and Helsingborg.

Access to work by car and public transport 2014

The first row is showing the commuting accessibility by car and the second row is showing commuting accessibility by public transport. The colour green is the showing the shortest travel time and red is showing the longest travel time.



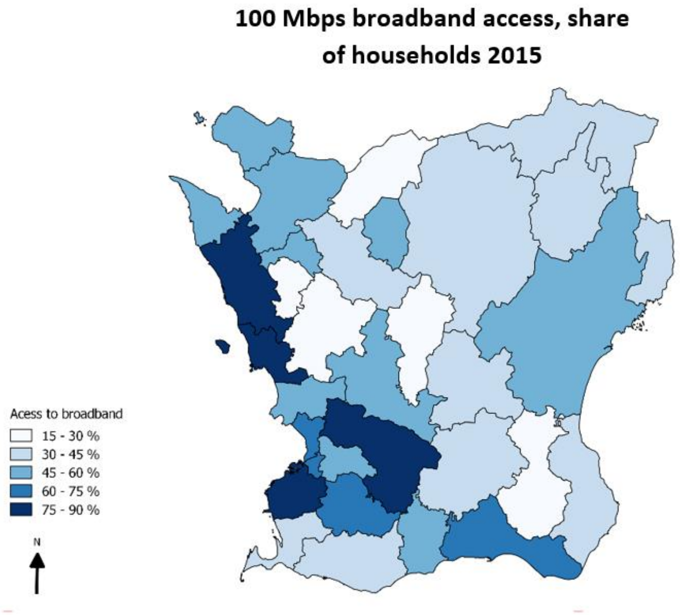
Source: Region Skåne (2013). The maps show accessibility prior to the introduction of border controls between Denmark and Sweden in November 2015.

On November 12, 2015, temporary internal border controls were introduced in Sweden. ID checks on buses, trains and ferries to Sweden from countries such as Denmark were later introduced as well. This did not impact the journey time for car trips across the Öresund Bridge and ferries between Helsingborg and Helsingör. But train operators on the Öresund Bridge are obliged to conduct ID checks on all passengers before the trains leave Denmark. Furthermore, time has to be made for a police check at the first stop in Sweden. For commuters across Öresund, the overall effect of this was to extend the travel time between Copenhagen Central Station and Malmö Central Station from 35 minutes to 75 minutes. This in turn has negative consequences for the number of jobs to which it is possible to commute within a reasonable time frame for residents of Skåne.

Broadband access

Broadband access is essential for attaining policy objectives in several areas of society. The goal is for 90 percent of all households and businesses to have access to broadband at a minimum speed of 100 Mbps in 2020. The government subsidises network development, establishes good market conditions and eliminates barriers to development, but services and broadband access are provided by the market.

All households have access to wireless broadband and a little more than half have access to fibre. In Skåne, 66% have access to 100 Mbps broadband.



Source: The Swedish Post and Telecom Authority (PTS)

1.7 Housing supply and demand

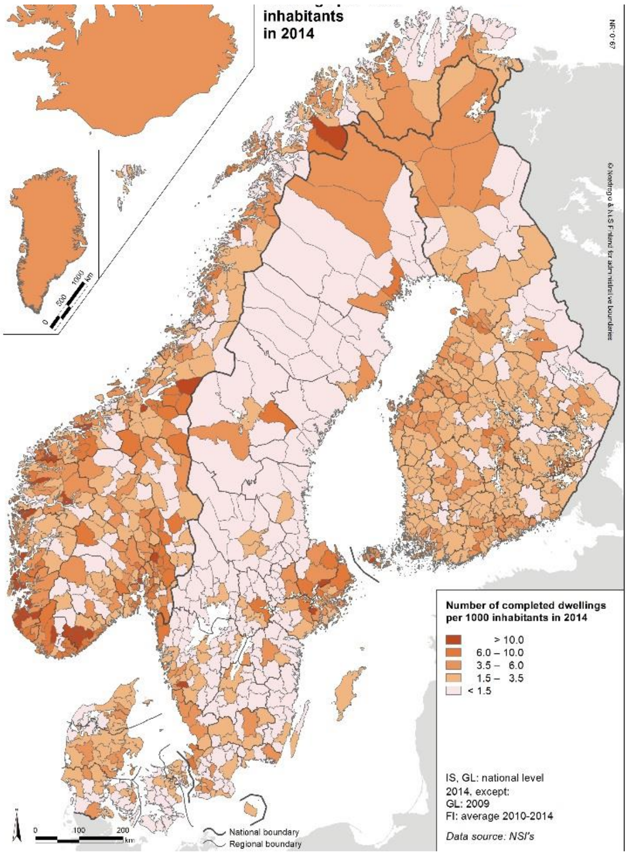
One of Sweden's and Skåne's main challenges today is the housing shortage. Skåne has a housing deficit in 29 out of 33 municipalities. The deficit together with augmented house prices constitute barriers to the housing market for many people in Skåne.

The Skåne housing market

In Skåne, 49 percent of the population live in apartments and 44 percent live in houses (detached or semi-detached). The remainder live in special housing and other buildings such as housing for elderly people or students. About 60 percent of apartments are rented apartments and the remaining 40 percent are owned by the tenants. The share of rented apartments has fallen over the past decade due to increased disposable income for workers and lower interest rates.

The Skåne County Administrative Board's annual analysis of the housing market in Skåne. In their latest analysis in 2016, the number of municipalities that stated they had a deficit in the housing market was 29 out of 33 municipalities in Skåne, which is an increase of 7 municipalities since 2015. No municipality stated that they had a housing surplus in 2016. It is very difficult for both recently arrived immigrants and young people to get a home in Skåne. This can be partly explained by an increased migration to Skåne, but also by intensifying competition for small rented apartments.

Number of completed homes per 1,000 inhabitants in 2014



Source: Nordregio, 16 February 2016

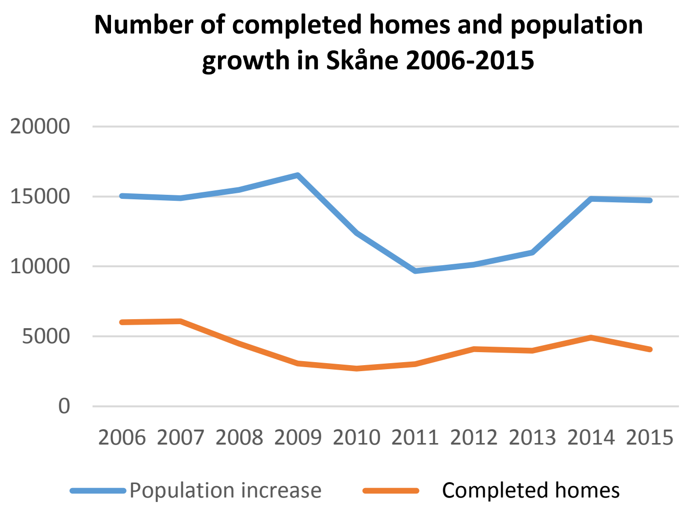
The fact that the Swedish housing market operates less well than in the other Nordic Countries becomes obvious when you look at the map of completed homes. More houses per capita are built in all the other Nordic countries, even if the Swedish part of Western Scandinavia has relatively better figures than many other parts of Sweden, due to high attractiveness of living on the coast.

Nearly 40,000 homes, in newly constructed buildings, have been completed in Skåne between 2006 and 2015. 57 percent of housing construction during this period took place in the three largest cities: Malmö, Helsingborg and Lund. The long-term trend shows an increased concentration of housing construction to these municipalities. In 2015, 69 percent of all new homes were built there, compared to 29 percent in 1990, 46 percent in 2000 and 53 percent in 2010. Malmö alone had 35 percent of all new homes in 2015, compared to just 11 percent in 1990.

However, Malmö and Helsingborg had the seventh and eighth largest number of completed homes per 1,000 inhabitants between 2006 and 2015, while Lund ended up in second place. Several smaller municipalities around these three cities have seen an even higher construction rate compared to their population size. These include Lomma, Båstad, Höganäs, Vellinge and

Kävlinge, which are all suburban municipalities with relatively high median disposable incomes. On the other end of the scale are several smaller municipalities, primarily in the eastern and the northern parts of Skåne, such as Tomelilla, Östra Göinge, Perstorp, Svalöv and Osby.

If the number of completed new homes in 2015 is cross-referenced with the increase in population for the year, it yields 3.6 residents per new home. The average number of residents per household in Sweden is around 2.2. In the population statistics for Skåne in 2015, the nearly 20,000 people registered with the Migration Board as asylum seekers, are not included. Housing construction in Skåne did not match the increase in population in 2015, i.e. Not enough homes were built in Skåne in 2015.

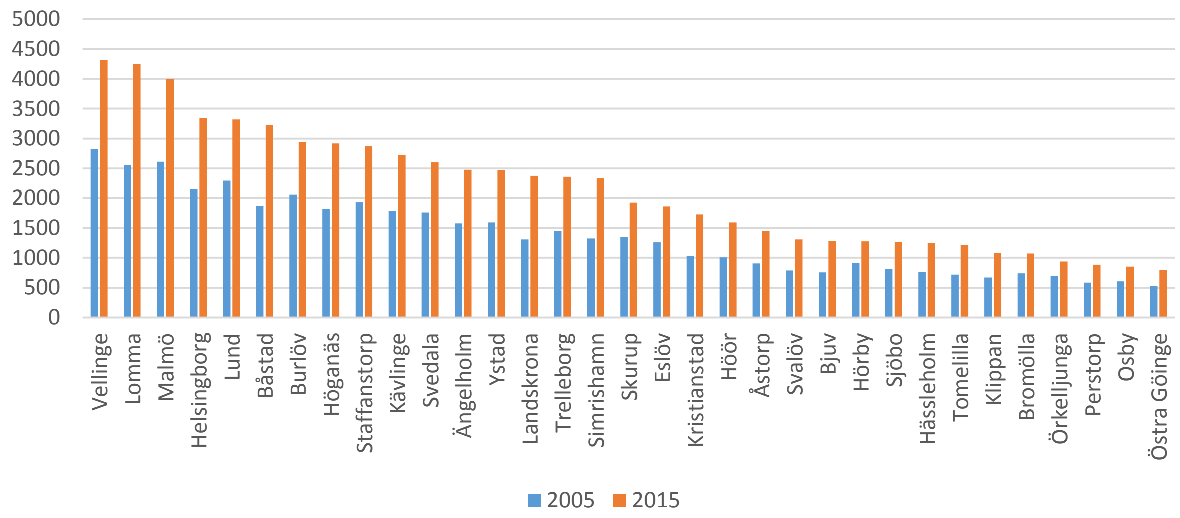


Source: Statistics Sweden

Regional property prices and attractiveness

As seen in the figure, house prices (detached and semi-detached) vary substantially in Skåne where the average purchase-price is higher in the western part of Skåne than in the eastern parts. It is primarily in the three biggest cities, Malmö, Helsingborg and Lund and their surrounding municipalities, that have the highest purchase prices. Between 2005 and 2015, the average purchase price for houses in Skåne has increased by 60 percent, which is lower than Stockholm and western Sweden. One reason why the average purchase price in Skåne has not risen as much as in Stockholm and western Sweden is due to the housing bubble in Denmark in 2008/2009. Prices in 13 out of 33 municipalities in Skåne have risen by more than 60 percent over the past ten years. The gap between supply and demand looks to continue to increase, mainly because of the unexpectedly large population growth and a construction rate that has not matched population growth over time. The housing shortage prevents movement, as it is difficult to move even for those who want to move from larger homes to smaller.

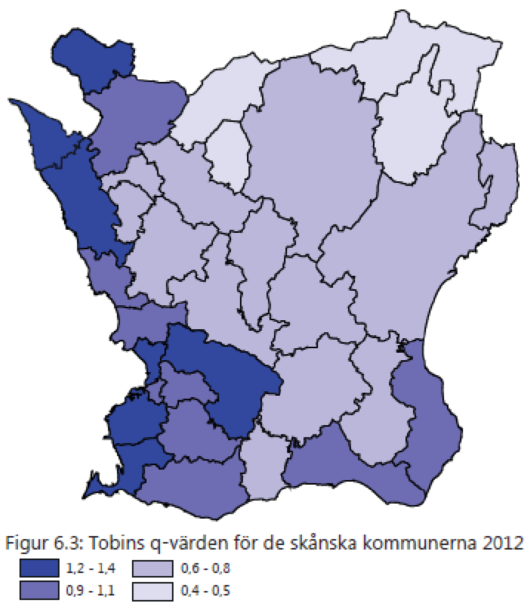
Detached and semi-detached homes, average prices (SEK thousand)



Source: Statistics Sweden

House prices vary between municipalities in Skåne. In order to obtain bank loans for new construction, it is important that new buildings are valued at a higher price than the cost of production. Tobin's q is an investment indicator where the market value for one home in a municipality is divided by the cost of production in the same area. A figure of over 1 indicates that it is profitable to build. Tobin's q is calculated as an average value. The map shows that profitability is most difficult to achieve in north-eastern central Skåne, and the highest values are achieved along the coast.

Tobin's q for the Skåne municipalities 2012



Source: The County Administrative Board of Skåne

1.8 Environmental sustainability

Sweden is at the cutting edge of environmental sustainability. According to Yale's environmental index, Sweden is ranked third out of 180 countries. However, environmental sustainability is still lacking in many areas. Biodiversity and habitats, fishery and forestry are the most problematic areas for Sweden.

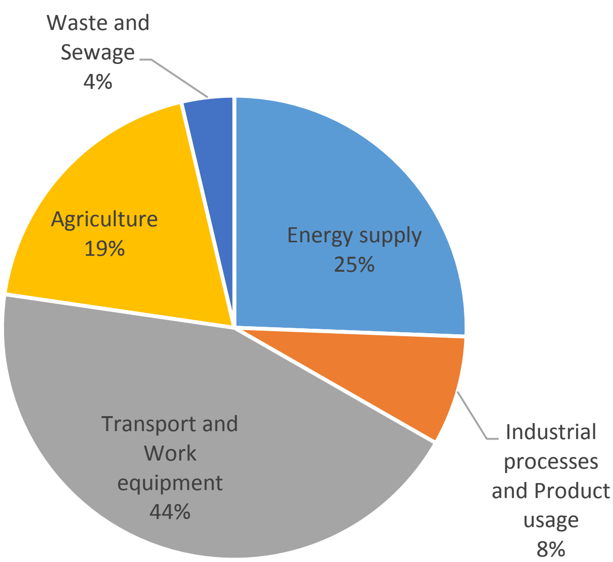
The county administrative boards in Sweden have been asked to evaluate 16 environmental quality objectives on a regional level. In the region of Skåne, the county administrative board concluded that, with the existing management and control measures, none of the objectives will be achieved until 2020. The following section presents statistics and policy ambitions regarding the environmental sustainability, based on the evaluation carried out by the county administrative board in Skåne.

Climate change and greenhouse gas emissions

Two of the primary sources of greenhouse gas emissions are transport emissions and energy supply, which constitute 65 percent of all emissions in Skåne. Between 1990 and 2014, greenhouse gas emissions have fallen by 24 percent on a national level. In Skåne greenhouse gas emissions have fallen by 32 percent. The primary source of the reduction in Skåne is a reduction in energy supply by more than 50%. This is partly a result of biofuels replacing oil for heating.

In 2014, production of biofuels increased by 20 percent. Biofuels account for 45 percent of all vehicle fuel delivered to Skåne. Half of the energy infusion in Skåne consists of renewable energy, the major part of which is from wind power. However, in terms of solar energy the average usage per capita is still relative low. The average solar energy production in Skåne is 10.3 Watts per capita, which can be compared to Germany, whose production amounts to 474 Watts per capita. Although the number of connected solar energy facilities increased by 57 percent last year (2013), the usage and number of solar energy facilities must increase further in order to reach the full potential of 4.2-8.9 TWh.

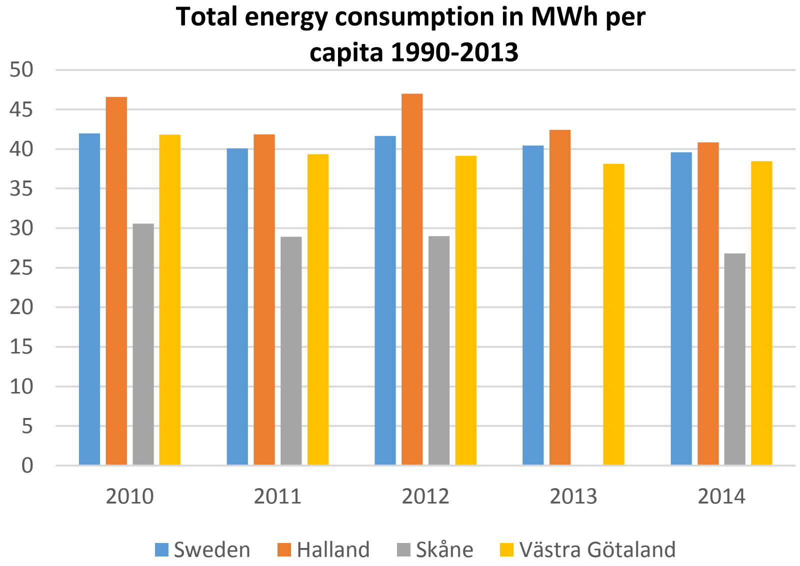
Greenhouse gas emissions in Skåne 2014



Source: Miljömålen

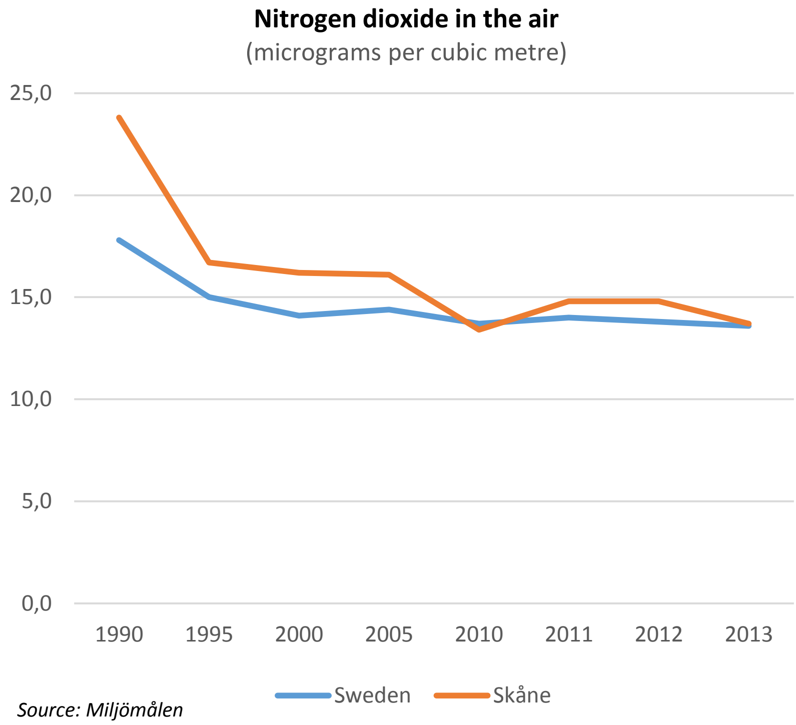
Transport emissions have been relatively constant in Skåne, Halland and Västra Götaland and have only been reduced by 9 percent in Skåne since 1990. The average driving distance per person is unchanged compared to the previous year (2013). The figure, *Greenhouse gas emissions in Skåne 2014, presents* the distribution of greenhouse gas emissions. As can be seen, one of the major challenges for Skåne is to reduce transport emissions.

The total energy consumption per capita in Sweden is fairly constant and has fluctuated around 40 MWh annually in recent years. On a national level, total energy consumption per capita for Skåne and Västra Götaland is below the national average, while energy consumption in Halland is above the national average.

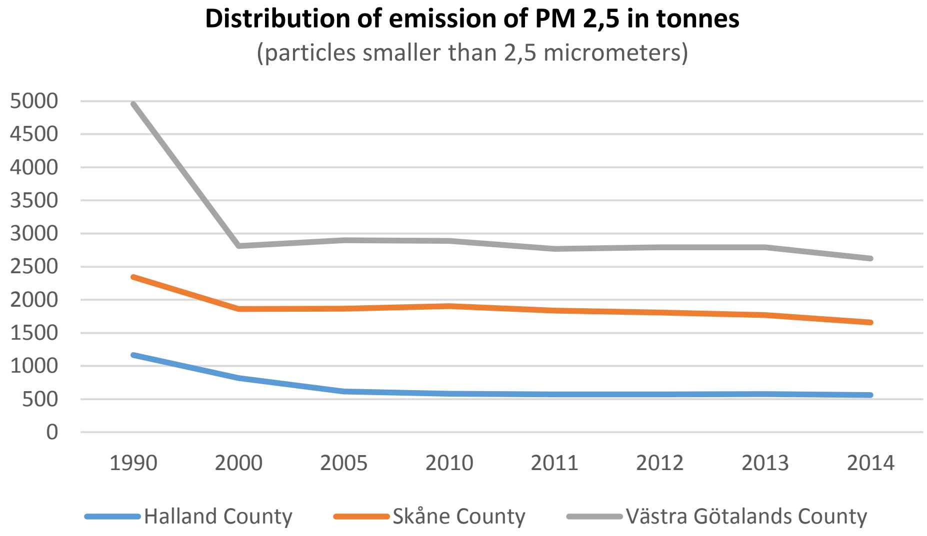


Source: Miljömålen

The air quality in Skåne is not good enough to fully safeguard the health of humans and animals, and it may also impact cultural capital. The figure, *Nitrogen dioxide in air,* shows the nitrogen dioxide level in the air, nationally and in Skåne between 1990 and 2013. The level in Skåne was slightly higher than the national average in 2013. In areas more exposed to traffic, especially in Malmö, the level exceeds the environmental quality standard.

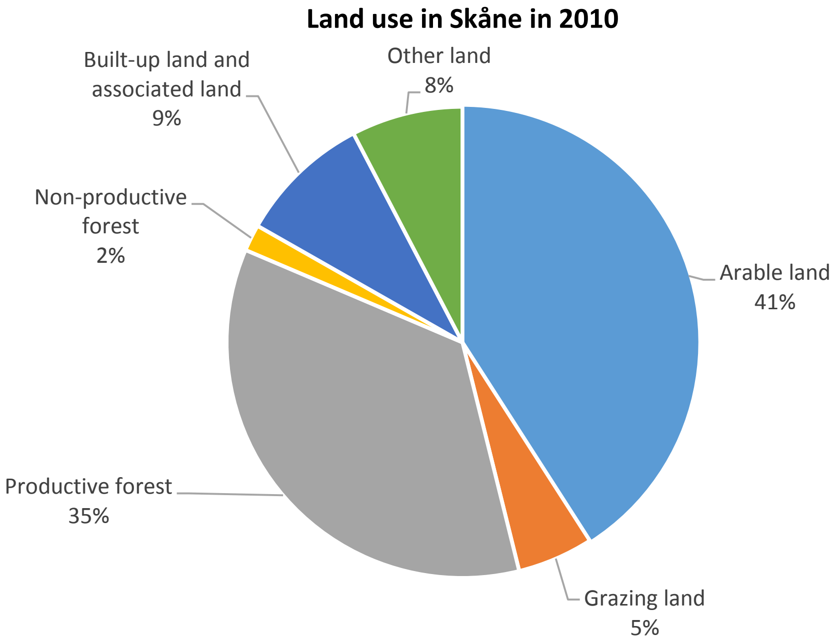


Source: Miljömålen



Source: SMED

The emissions of PM2.5 in Sweden has fallen by 42 percent, in Halland by 52 percent, in Skåne by 29 percent and by 47 percent in Västra Götaland since 1990. It is primarily industrial processes that has fallen in all counties since 1990. The daily average level of PM2.5 in Skåne exceeds the quality norms in the cities of Malmö, Burlöv and Landskrona. Although, when looking solely at the annual average levels, it is only exceeding the environmental quality norms in Malmö.



Source: Statistics Sweden

The total land area of Skåne is almost 1.1 million hectares, 35 percent of which is used for forestry and 46 percent for agriculture. The arable and grazing land is slightly predominant in Skåne compared to other parts of the Megaregion, where the arable and grazing land constitutes almost one third of the total land area. Only 9 percent of the land area in Skåne consist of built-up land and land associated with it. The land used for agriculture is decreasing as more land is being developed and built up. The lack of green spaces is mostly a concern in the city of Malmö, where 16 percent of the population had no green space within 200 metres compared to six percent in Lund and 9 percent in Helsingborg in 2010.

The over-fertilization is severe in Skåne, and stems from the fact that large parts of the land are used for agriculture and many parts of the drainage system are still separate and not connected to the municipal drainage system. The inland water is still negatively affected and only 17 percent of surface water is considered to be of good standard. The ground water quality, on the other hand, is found to be sufficient. However, one major challenge is to ensure water quality in the future. As climate change might induce longer farming seasons, the competition for water consequently could increase.

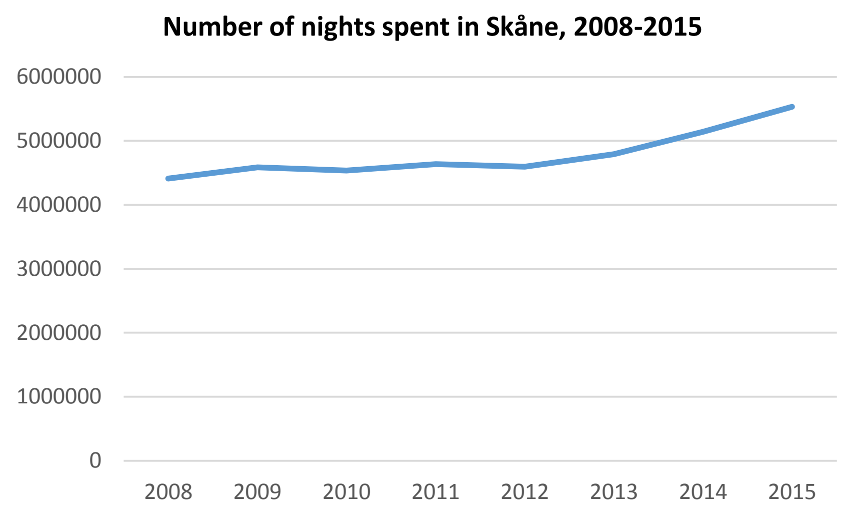
1.9 Tourism and Culture

Skåne is a region with vibrant cultural life, where many people devote their free time to everything from visiting museums to reading books. It is also a region where 28,000 people make their living from the cultural and creative sector, and is well known for its computer gaming companies as well as its tourist attractions.

Tourism

Approximately 28,000 people, or 5 percent of Skåne´s working population, is working in the tourism sector and other related sectors. The overall turnover is estimated at almost SEK 37 billion in 2015. The number of nights spent in hotels, holiday villages, hostels, camping sites, commercially arranged private cottages and apartments in Skåne reached a total of 5.5 million in 2015. Around 74 percent of the nights spent in Skåne were attributed by Swedish citizens. European citizens made up another 19 percent.

The increase in the number of nights spent in Skåne is significant. Between 2008 and 2015, the total increase is 1.1 million nights, i.e. 25 percent. The largest increase can be seen among citizens from countries outside Europe, whose guest nights have more than doubled since 2008.



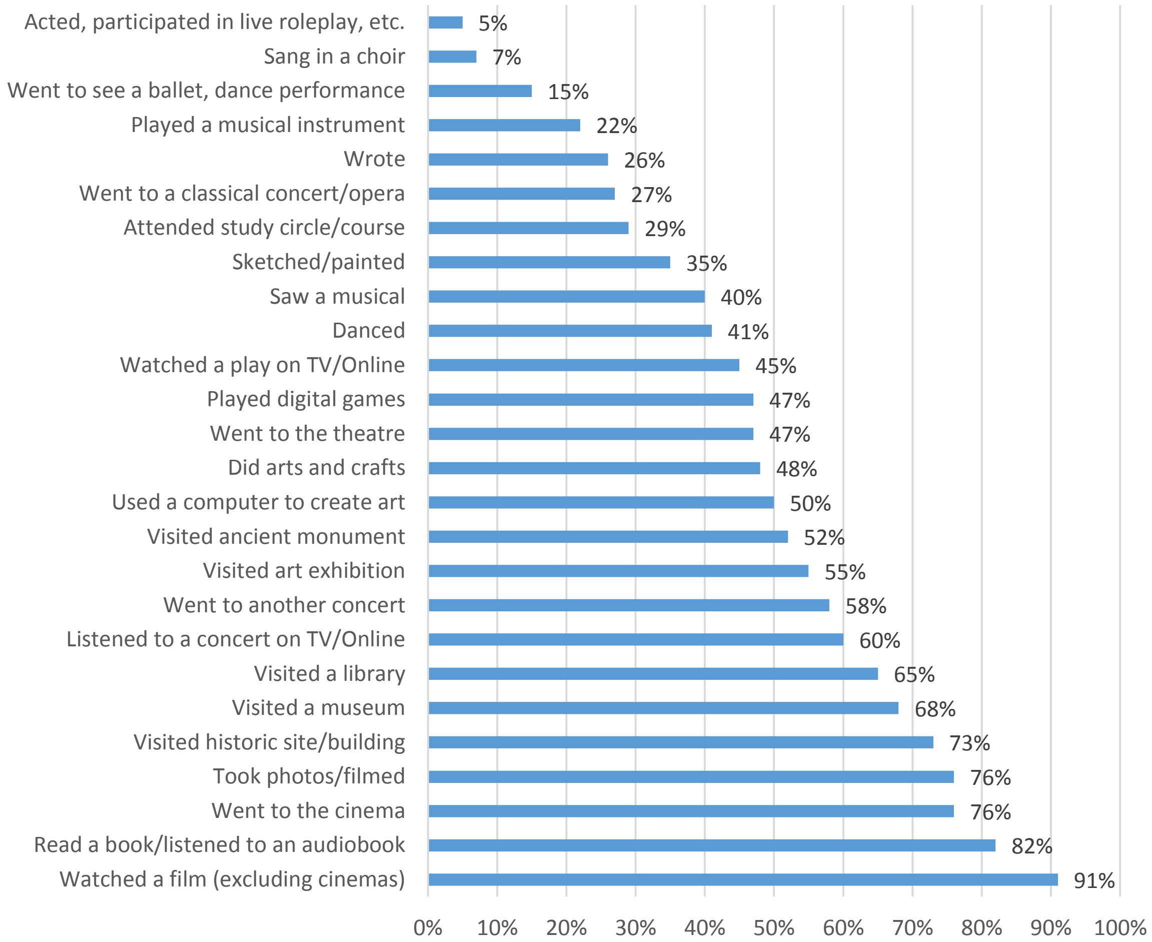
Source: Statistics Sweden

There is a large number of destinations in Skåne that attract visitors from all over the world, including over 200 museums and 70 golf courses. The Ale Stones, Skåne’s djurpark (the zoo of Nordic animals), Turning Torso and Lund Cathedral are some of Skåne's classic tourist attractions and exciting places to visit.

Cultural consumption in Skåne

According to a survey from 2016, two thirds of the population in Skåne went to a museum and the same number visited a library in the last 12 months. The most popular cultural activity was watching movies, which more than 90 percent had done. Reading and watching films in the home are things that most people in Skåne do on a weekly basis. On average, the people in Skåne is more interested in cultural activities than the Swedish population as a whole. This is most notable when it comes to playing digital games, going to theatres, attending art exhibitions and visiting libraries.

Skåne's cultural habits over a twelve-month period, 2016



Source: kulturvaneundersökningen 2016

Women and younger individuals have a higher level of cultural consumption. Those under 30 watch films, play digital games and read more than the older generations. On the other hand, those older than 65 consume more of the performing arts than younger people do in Skåne.

In general, women consume a lot more culture then men. They read and paint to a greater extent, and they visit museums and performance arts more frequently. Men spend more time playing musical instruments and digital games.

People with a higher education generally spend more time on cultural activities than people do with less education. Higher income is another factor that contributes to cultural consumption, with the exception of playing musical instruments, painting, dancing and writing. However, these facts are complicated by the knowledge that age and occupation play an important role in cultural consumption, which could make these correlations spurious.

Cultural consumption tends to be higher in the urbanised areas compared to smaller towns and the countryside. This is especially true of the cities in the south-west part of Skåne.

Cultural and creative industries

In an interview and register-based survey from 2016, the cultural and creative industries in Sweden were studied. These were divided into seven sectors, design and fashion, culture and experience, literary and artistic creation, media, performing arts, film and photography, as well as game development.

Like the rest of Sweden and the rest of Europe, the film industry in Skåne is largely dependent on public funds. Few companies have sufficient revenue to enable them to survive without public sector support. In 2013, there was a total of about 674 private companies that produced films and videos in Skåne and they had a total of between 860-900 employees.

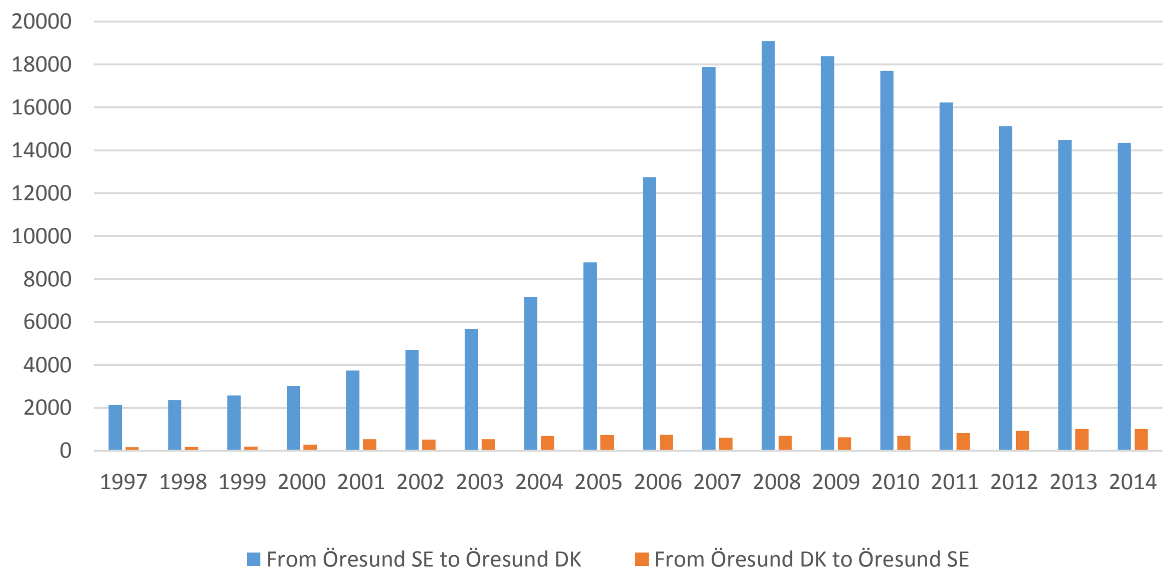
The computer gaming industry in Skåne is growing rapidly and has attracted considerable attention in recent years. In comparison with the rest of Sweden, Skåne is well represented in the computer gaming industry and after Stockholm, Malmö is the Swedish city that has the most employees working in the gaming industry. In 2013, which was the year of the survey, there were 55 companies registered, which was an increase of 20 percent since 2011. In 2015, the region's largest game development companies were Ubisoft Massive and King.

1.10 The Greater Copenhagen area

The Öresund region (The Greater Copenhagen area) consists of the whole of Skåne on the Swedish side of the Öresund and Zealand, Lolland, Falster; Mön and Bornholm on the Danish side of the Öresund. The Öresund region is the largest and most populous metropolitan area with just over 3.9 million people, of which about two-thirds are on the Danish side and one-third is on the Swedish side of the Öresund. The Öresund Bridge was opened in the summer of 2000, which provided new opportunities for the Öresund region.

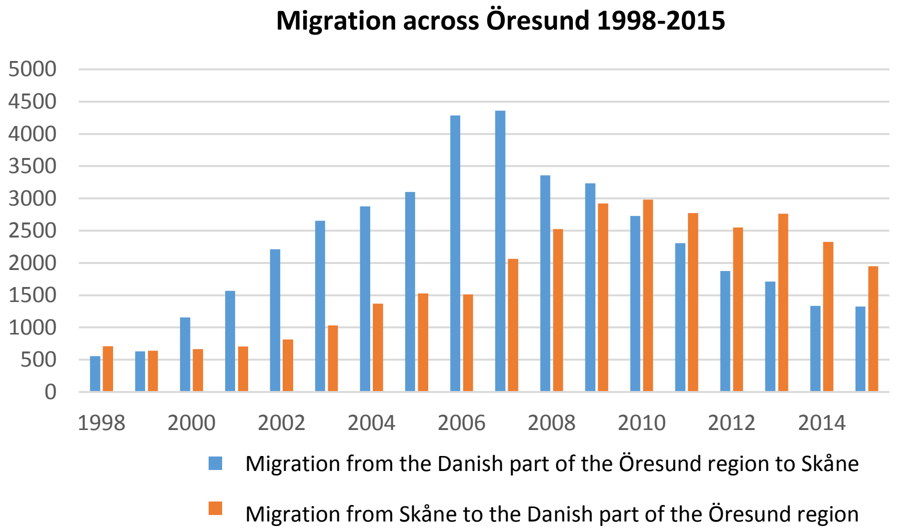
The construction of the Öresund Bridge led to a sharp increase in the level of commuting across the strait. In the years that followed the opening, the number of commuters increased from about 2,000 to nearly 20,000 in 2008. The sharp increase was not only due to many residents of Skåne choosing and getting the opportunity to work in Denmark and especially Copenhagen. It was also due to the fact that residential property prices in the Copenhagen area rose sharply and many Danes chose to buy a house in Malmö and commute across the bridge to work in Denmark. The number of daily commuters from the Danish side of Öresund to the Swedish have remained stable over the past few years, at around 1,000. Daily commuters from the Danish side of Öresund to Sweden has have a greater share of tertiary education than those commuting from the Swedish side of Öresund to Denmark. In addition to the Öresund commuters, another 3,600 people had salaries from the Danish side Öresund in 2014.

Cross-border commuting across Öresund 1997-2014



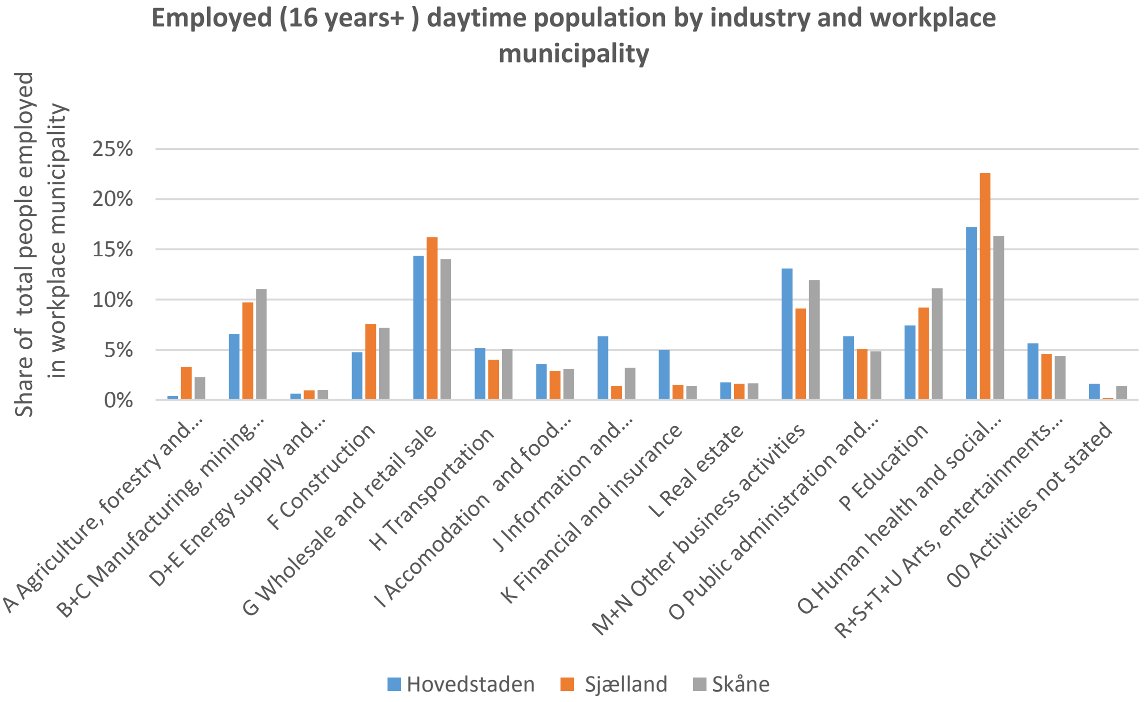
Source: The Öresund databank

Migration from the Danish side of Öresund to Skåne grew up until 2007 and the level was six times that of the days before the bridge was completed. One important cause behind the growing migration from Denmark was the rapidly increasing housing prices in the Copenhagen area, combined with good and inexpensive housing in Skåne within commuting distance to the attractive and well-paid jobs on the Danish side of Öresund. In the autumn of 2006 housing prices peaked in Copenhagen, and prices subsequently fell sharply. Since then, fewer Danes have moved to Skåne while more and more people opted to move across the strait to Denmark. However, this flow has also abated over the past few years and the total migration across Öresund is back to the same level as in 2002. Since 2010, Skåne has had negative migration in relation the Danish side of the border. Of those who moved from the Danish side of Öresund to Skåne in 2015, 52 percent were born in Denmark and 20 percent in Sweden. In the other direction, people born in Denmark constituted 44 percent of the migrants and 27 percent were born in Sweden.



Source: The Öresund databank.

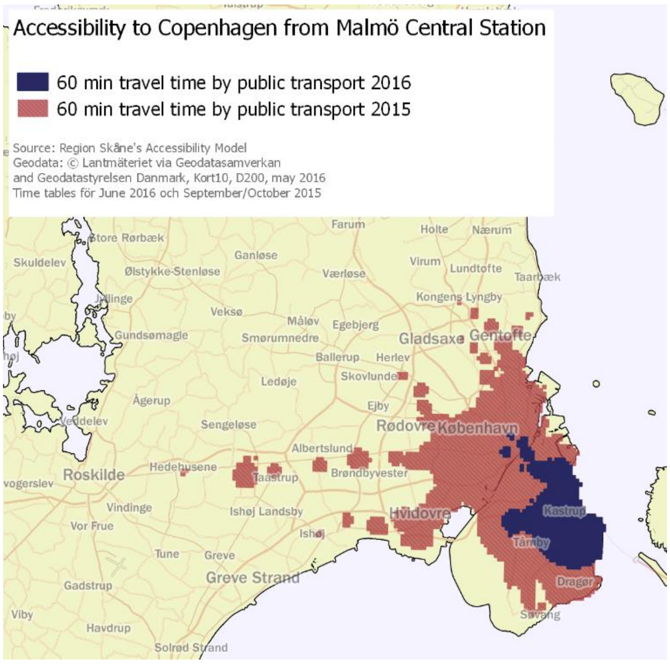
In a comparison between Skåne and the two Danish regions, Hovedstaden and Zealand, there were no great differences in the overarching industry structure. What distinguishes Hovedstaden is that, as a capital region, there are more people employed in "information and communication" as well as in finance and business services in this region than in the others.



Source: The Öresund databank

On November 12, 2015, temporary internal border controls were introduced in Sweden. ID checks on buses, trains and ferries to Sweden from countries such as Denmark were later introduced as well. This did not impact the journey time for car trips across the Öresund Bridge and ferries between Helsingborg and Helsingör. But train operators on the Öresund Bridge are obliged to conduct ID checks on all passengers before the trains leave Denmark. Furthermore, time has to be made for a police check at the first stop in Sweden. This significantly affects the timetable.

In practice, this means that any train traveller from Denmark to Sweden has to disembark at Copenhagen airport for an ID check. Later, the train stops for nine minutes at the first stop in Sweden, Hyllie, in order for police to conduct a passport check of all passengers. To accommodate these checks, the frequency of services has been reduced, which impairs the opportunities for catching connecting trains and prolongs travel times in general in the Skåne public transport network.



For commuters across Öresund, the overall effect of this was to extend the travel time between Copenhagen Central Station and Malmö Central Station from 35 minutes to 75 minutes. This in turn has negative consequences for the number of jobs to which it is possible to commute within a reasonable time frame for residents of Skåne. This means for example, that it is no longer possible to commute between Lund central station and Copenhagen city centre within one hour, using public transport. In figures, we have seen a drop of at least around 320,000 job opportunities to which it is possible to commute in under an hour from Malmö central station. In comparison, Skåne has around 560,000 job opportunities in total.

1.11 Megaregion Western Scandinavia

Strengths, weaknesses, opportunities and challenges in the Megaregion

The figure below outlines the main strengths, weaknesses, opportunities and challenges for Megaregion Western Scandinavia. The focus is on the common issues for the area as a whole. The analysis has been produced by the steering committee for the territorial review of Megaregion Western Scandinavia.

Strengths	Opportunities
▪ Three metropolitan city regions affecting three countries with extensive human and economic exchange and interdependency ▪ Common history, language, culture and a genuine feeling of belonging together ▪ Modern sustainable societies, a high standard of living, trust and few external threats ▪ Attractiveness and quality of living – metropolitan cities, sea and lakes, innovation, experiences ▪ Knowledge intensive, innovation leaders. R&D in competitive global companies, higher education. ▪ Large population living relatively densely ▪ Common EU-programmes and border collaboration	▪ Eight Million City – from Oslo to Copenhagen ▪ Knowledge and skills that complement and reinforce competitiveness for all parts ▪ Investment in high-speed rail traffic. Alternative ways of financing? Alternative solutions? ▪ Public institutions and businesses in close collaboration and mutual learning ▪ Joint activities for social development in creative industries and ICT ▪ Forerunners and benchmarking regions in creating fossil-fuel independent societies and sustainable cities ▪ More resilient regions, jobs and welfare in the regions as well as in Norway, Sweden and Denmark.
Weaknesses	**Challenges**
▪ High levels of road transport of goods and people in an infrastructure system with missing links ▪ General shortage of qualified labour and lack of opportunities for people with a lower education ▪ Little exchange between institutions ▪ Poor political cooperation between Oslo and Copenhagen and between national authorities ▪ No joint capability to decide on crucial infrastructure investment ▪ Strong regions, sometimes reluctant to cooperate ▪ A relatively peripheral geographical position in a European context	▪ Creating financial solutions for more sustainable transport and logistics solutions in the Megaregion. ▪ Solving remaining border barriers – DenSweNor ▪ Inclusive growth, with job opportunities for people of all levels of education ▪ Enhancing cooperation at the political and practical level in western Scandinavia ▪ Making politicians and authorities cooperate across country borders. Working against nationalism. ▪ Increasing connectivity in key areas like higher education, research, experience industries, sustainable cities and societies to develop a more resilient society with maintained global competitiveness

Towards a Western Scandinavian Megaregion

Western Scandinavia benefits from high natural population growth, net migration from other parts of Norway and Sweden, as well as migration from other countries. The demographic vulnerability in terms of natural population growth remains strong in areas outside of the major urban areas (Oslo, Göteborg, Malmö). The demographic structure remains overall beneficial. Although on the increase, compared to other parts of Scandinavia the welfare burden (the proportion of the economically active age cohort relative to the total population) in the Megaregion remains low. All parts of the Megaregion have experienced net population growth over the past decade, with the highest relative population growth being in the northern part of the Megaregion.

Megaregion Western Scandinavia is in a rapid transition to a more urban and resilient economy. The developments after the financial crisis have brought strong economic growth and new job creation at well over one percent per year in the region. One explanation for this is the frequent and, in many cases, increased exchange within all areas of the economy. Cross ownership and investments have increased between the countries. Trade relations are the most or among the most important. The labour markets are intertwined by strong commuter flows at the borders, and Nordic labour market integration means that people in the different countries take advantage of differences in economic cycles. One example is that three percent of all those employed in Norway in 2010 where Swedes. There is extensive economic exchange in the markets for tourism, commercial trade and properties, creating opportunities for people and companies on all sides of the borders as well as in the region as a whole.

Western Scandinavia is strong on innovation. R&D levels are high and the EU Regional Innovation Scoreboard ranks the different parts of the region as innovation leaders or strong innovators in a European perspective. The regional specialisations differ and better connectivity would engender more collaboration and competitiveness, in the regions as well as in the countries affected. The transition to a more urban economy is seen in the rapid growth in areas dependent on a dense economic environment, such as business services, hotels and restaurants, etc. There is also rapid growth in the medium to high-technology sectors. An urban economy based on qualified services, high-tech and “city life” is less dependent on the outside world, more competitive and all in all, more resilient.

Although the northern (Norwegian) part of the Megaregion is lagging behind somewhat, the bulk of the Megaregion Western Scandinavia is a leading innovation region in a European (EU28) perspective, both in terms of enabling factors (tertiary education attainment, public and private R&D expenditures), company activities and innovation outputs.

The Megaregion hosts a large number of high-quality higher education institutions (HEIs), mainly concentrated to the three major metropolitan areas. The number of students enrolled at HEIs in the Megaregion currently exceeds 250,000. There are high concentrations of highly educated individuals in the metropolitan areas, and the education level of the economically active population outperforms the national averages (in Norway and Sweden) in almost all parts of the Megaregion. In a EU28 perspective, tertiary education levels (ISCED 5+) among 30-34 year olds, particularly among females, are exceptionally strong in the metropolitan areas of Western Scandinavia.

But there are several challenges. Co-operation between universities could improve. More students need to leave school with grades in all subjects. More co-operation and benchmarking in the region could bring new solutions. The ability to create jobs for people with low levels of education is a key issue for inclusive growth, and a common problem in the Megaregion. The unemployment for people with higher education is almost non-existent in 2017. A better integrated region would mean more job opportunities in a wider spectrum of the economy.

The flawed rail infrastructure has been the main reason behind the creation of cross-border organisations like the Scandinavian Arena and the Gothenburg/Oslo partnership over the past 20 years. Based on a vision of connectivity creating benefits for all parts of society, the strategy has been to push for the much-needed rail investments. The result so far is meagre.

The development over the past decade has meant that the need for investments has increased dramatically. The transport of goods between the south and the north part of the Megaregion has increased dramatically. The exchange inside the region has increased, both in economic terms and between people. The development is not sustainable in environmental, economic or social terms. Western Scandinavia undoubtedly, and according to independent assessors, has one of the largest potential for economic and sustainable development in Europe. Due to neglected infrastructure development, this potential is not taken advantage of by citizens or industry in Norway, Sweden and Denmark, nor for the inhabitants and companies in the respective regions.

The main missing link is one between Oslo and Gothenburg. The relation Oslo-Gothenburg is probably the one with the largest difference in travel time by train and car between two metropolitan city regions, where a rail connection exists, in Europe. On the West Coast Line from Malmö to Gothenburg single track passages need to be converted to double tracks. Rail investment is a key to better connectivity in all areas of Western Scandinavia. It will not only bring better accessibility but also a more efficient use of other resources like airports, etc.

Western Scandinavia is characterized by attractive metropolitan centres and an attractive environment revealed by high property prizes and returns on investment in building all the way from Copenhagen to Oslo. At the same time, the housing market constitutes one of the biggest challenges for the region. There are severe imbalances in the market in all parts of the area. The assessment made by responsible authorities is that building activity needs to increase by between 20 and 50 percent. Young people and people with less financial resources are most affected. The problems are manifold, including market failures, rules and regulations, extensive rights to appeal etc. The solutions need to be formulated in the respective countries and regions but increased connectivity in and between the metropolitan centres and regions would contribute to better functioning markets.

There has been a strong and growing trend for more sustainable cities in the metropolitan cores of Western Scandinavia over the past decade. A focus on building densely and in close connection to public transport, together with the transition to a more urban economy, has had an impact. Earlier tendencies towards urban sprawl seem to have come to a halt. Local and regional planning in all metropolitan centres now has sustainable cities at its core. In Oslo and Gothenburg different forms of congestion fees have been introduced. Public transport will be fossil-free in the regions within the coming years and self-driving cars will be tested on a large scale in Gothenburg, starting 2017. With increased connectivity, western Scandinavia have the conditions and the will to play a leading role in sustainable cities.

Cities and regions in western Scandinavia have ambitious visions and strategies for becoming fossil-independent in the coming decades. The emission of greenhouse gases has been cut by between 10 and 20 percent in the different parts of the region over the past decade. This decoupling has taken place despite a fast growth in population and the economy, and despite the fact that all of Sweden's refinery capacity is in western Sweden. Several cross-border projects are running in this area but there is room for more strategic co-operation. The Megaregion is also characterized by low negative effects on health due to environmental problems. Last but not least, there is a common interest in the coastal area and the ecosystems of the sea. Enough land and sea need to be preserved to safeguard biological diversity and the issue of eutrophication should be high on the agenda.

Western Scandinavia is an attractive region with an active culture sector, high participation in society and a common focus on quality of life, experiences and events. The tourism industry is growing rapidly in the region in absolute numbers, in jobs and in relation to the respective developments in Norway, Sweden and Denmark. Cultural activities and events can and should be seen as a gateway to closer collaboration and better connectivity between the regions and cities inside western Scandinavia.

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