Business Region Göteborg
OPPORTUNITY TO ESTABLISH E-COMMERCE TECHNOLOGY OPERATION
This presentation is a broad overview of the players in the eCommerce cluster in West Sweden.

It is intended to present options for your organisation to get access to some of the world’s leading experience in Retail Clothing eCommerce and other partners in the eCommerce cluster.

The most common ways for international companies to enter the West Swedish eCommerce arena

- **Partnerships**
  - Joint development projects or market entry

- **M&A or Capital Investment**
  - Acquire knowledge and technologies through acquisition or merger
  - Venture Capital Investments

- **Join R&D projects**
  - Leverage Swedish knowledge and experience through establishing own R&D center

- **Establishment of R&D center and/or consultancy operations**
  - Join R&D projects with leading Swedish actors
  - Exploit the possibility of co-funding from Swedish Research Institutes
  - Commission Contract R&D
Electronic commerce, commonly written as e-commerce or eCommerce, is the trading or facilitation of trading in products or services using computer networks, such as the Internet. Electronic commerce draws on technologies such as mobile commerce, electronic funds transfer, supply chain management, Internet marketing, online transaction processing, electronic data interchange (EDI), inventory management systems, and automated data collection systems.

Omnichannel
"Omnis" is Latin for "every/all" and is considered the integration of all physical channels (offline) and digital channels (online) to offer a seamless and unified customer experience.
WEST SWEDEN & THE GOTHENBURG REGION

Population, 1.6M.
Nordic Center for industry, international commerce, international trade, logistics and transportation.
5th place Competitiveness
The region boasts positive results for employment, higher education and R&D.
Europe 2020 Regional Index: 5th place of 268 regions. Source: EU Commission
Logistic Center, 90 nonstop connections.
90,000+ students at the Universities
A hotbed of small and medium-sized companies in industries such as MedTech, Automotive, Energy, Environment, Media, ICT, Gaming and design.
Center for Swedish catalog sales an industry that has evolved to e-commerce.
SIIR – Swedish Institute for Innovative Retailing and their Retail Lab is just one of the research centers on retailing in the region.
One of the few Swedish retail-clothing companies that is not headquartered in West Sweden is H&M - but their eCommerce unit is.
Volvo In-Car Delivery (2015)
SWEDEN AT A GLANCE

- Top performing economy in Europe
- Wealthy consumers with high purchasing power
- Trendsetting and progressive country
- Sophisticated and early adopting consumers
- Strong appetite for new international retail brands

RANKS AS BEST PERFORMING ECONOMY IN THE WORLD
PWC’s ESCAPE Ind king, 2014

<table>
<thead>
<tr>
<th>Rank</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sweden</td>
</tr>
<tr>
<td>2</td>
<td>Switzerland</td>
</tr>
<tr>
<td>3</td>
<td>Singapore</td>
</tr>
<tr>
<td>4</td>
<td>Netherlands</td>
</tr>
<tr>
<td>5</td>
<td>Finland</td>
</tr>
</tbody>
</table>

Survey looks at economic factors but also political, social, technological and environmental factors.
THE NORDICS

Sweden is the very epicentre of the Nordic region, being the largest market, financial centre and hub for business in the region.

The Nordic countries – Sweden, Denmark, Finland and Norway – make up the 11th largest economy in the world, consisting of 26 million inhabitants.

PURCHASING POWER PER CAPITA
Nordic capitals, 2015

<table>
<thead>
<tr>
<th>City</th>
<th>Inhabitants</th>
<th>Purchasing power per capita, €</th>
<th>European index*</th>
<th>National index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stockholm</td>
<td>911,989</td>
<td>24</td>
<td>186</td>
<td>114</td>
</tr>
<tr>
<td>Oslo</td>
<td>647,676</td>
<td>35</td>
<td>269</td>
<td>116</td>
</tr>
<tr>
<td>Copenhagen</td>
<td>580,184</td>
<td>22,4</td>
<td>173</td>
<td>103</td>
</tr>
<tr>
<td>Helsinki</td>
<td>620,715</td>
<td>22,8</td>
<td>176</td>
<td>119</td>
</tr>
</tbody>
</table>
SWEDEN IS IN GOOD FINANCIAL SHAPE

- Public finances are balanced
- GDP growth is solid
- Employment levels increasing
- Interest rate low
- Consumer confidence high
- Purchasing power high
- Retail sales growing

**SWEDISH ARE THIRD WEALTHIEST IN EU**
GDP per capita in PPP, 2015, €

<table>
<thead>
<tr>
<th>Country</th>
<th>GDP per capita (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>45,495</td>
</tr>
<tr>
<td>Netherlands</td>
<td>43,004</td>
</tr>
<tr>
<td>Sweden</td>
<td>42,039</td>
</tr>
<tr>
<td>Austria</td>
<td>41,859</td>
</tr>
<tr>
<td>Germany</td>
<td>41,742</td>
</tr>
</tbody>
</table>
WEST SWEDEN RETAIL - CLOTHING CLUSTER

- Brands

H&M  LINDEX  KappAhl

ginatricot  ellos  jotex

STAYHARD  nelly.com  MQ

halens  CELLBES  Margaretha

JOY  GROLLS®

BERENDSEN  Björnkläder
A COMPLETE E-COMMERCE ECO SYSTEM...

...from research to retailing
...from core technologies to customers
...from dedicated specialized start-ups to multinationals
H&M – Ranked as the 2:nd largest global clothing retailer with operations in more than 60 countries, H&M’s eCommerce operation is based in Borås, West Sweden.

Lindex – A leading European fashion chain with 490 stores in 19 markets. You can shop online in all EU and Norway. Based in Gothenburg, West Sweden.

Ellos – A mail order company founded in Borås in 1947 that today has a turnover of more than 2,5 billion SEK under the brands Ellos, StayHard and Jotex. Borås has for a long time been the centre of the Swedish mail order industry.

KappAhl – Founded in Gothenburg in 1953 the company now has 400 stores in Sweden, Norway, Finland and Poland.
B2B E-COMMERCE - WEST SWEDEN COMPANIES

- **Global Corporations**
  - Volvo Group
  - Volvo Cars
  - SKF
  - SCA
  - Assa Abloy
  - Getinge
  - Mölnlycke Health Care.

- **B2B Sales**
  - New Wave Group
  - Luna
  - AJ Produkter
  - B&B Tools
  - Dentsply
  - Netlogic.

- **Travel Industry**
  - Resia
  - STS
  - Stena Line
  - Langley Travel
  - eTraveli

- **eCenter of Swedish Pharmaceutical Drug Distribution**
  - Oriola – Kronans Droghandel
  - Tamro
GLOBAL CORPORATIONS USING B2B E-COMMERCE

- **Volvo Cars** – Today more than five million car owners drive a Volvo and the sales- and service network covers around 120 countries.
- **Volvo Group** – One of the world’s leading suppliers of transport solutions for commercial use. Volvo offers a broad range of trucks, construction equipment, buses, pleasure- and working boats.
- **SKF** – Was founded in 1907 and is now the leading global supplier of products, customer solutions and services in the rolling bearing, seals- and related businesses.
- **Astra Zeneca** – One of the world’s leading pharmaceutical companies. One of its largest research centres is located in Gothenburg.
- **Mölnlycke Health Care** – One of the world's leading manufacturers of single use surgical products.
- **Dentsply Sirona** – One of the world leading in MedTech including dental solutions
- ...And many more like Saab, Ascom, SCA, RUAG, Getinge, etc
B2B E-COMMERCE SALES

➢ New Wave Group: New Wave Group is a growth company that designs, acquires and develops brands and products in the corporate promo, gifts and home furnishings sectors.

Luna: Luna has supplied tools and machinery for nearly one century. Today they are established in the Nordic countries, the Baltic countries and Poland. In their online ToolShop you can choose from 200 000 articles.

➢ AJ Produkter: With their roots in the catalogue business and now a modern eCommerce company, AJ Produkter has supplied furnishings to businesses for 40 years and now have employees in 19 countries.

➢ B&B Tools: B&B TOOLS provides the industrial and construction sectors in northern Europe with industrial consumables and industrial components.

Dentsply: One of the world leading in MedTech including dental solutions. Dental implants designed to eOrder.

➢ NetLogic: Part of the NetOnNet group NetLogic is a home electronics distributor. Among their customers are leading brands and companies within the retail- and distribution industry in Scandinavia and Europe.
TRAVEL INDUSTRY IN GOTHENBURG

eTraveli:
Etraveli is the leading Online Travel Agent (OTA) in the Nordic region, offering a wide range of airline tickets, hotel accommodations and travel related services.

Stena Line:
Stena Line Group is an international transport and travel service company with Europe’s most comprehensive ferry route network.

STS:
With over 50 years of experience in the language travel industry, STS provided over 12,000 students with an opportunity to travel, learn and experience an exciting, new country in 2015.

Resia:
Resia AB was founded in 1974 and now has 52 travel agency branches in Sweden, as well as an online reservation and sales system within Scandinavia.
DON’T MISS:
INTERESTING E-COMMERCE ACTORS IN THE GOTHENBURG REGION

➢ eTraveli Technology – Market leader in the Nordics for flight bookings

➢ Let’s deal – Market leader for deal’s in Sweden, outperforming Groupon
KNOW YOUR CUSTOMER – A COMPETENCE CLUSTER (1)
ACADEMIC RESEARCH & NETWORKS

❖ **SIIR – Swedish Institute** for Innovative Retailing (University of Borås)
The programme involves research disciplines in a multitude of research fields at the University of Borås such as business, IT, logistics, demand chain management, risk management, sustainability and event management.
All research conducted within the framework of SIIR is aimed to increase trade skills, both in academia and industry, and a particularly focus on the e-commerce field.

❖ **Handelslabbet**
A research laboratory using the latest technology to study consumer behavior, including Eye tracking, Virtual Fitting Booth with Magic Mirror and 3D Body Scanning.
HANDELSLABBET – THE RETAIL LAB AT SIIR
<table>
<thead>
<tr>
<th>Centre for Retailing (University of Gothenburg)</th>
<th>Centre for Consumer Science (University of Gothenburg)</th>
<th>Centre for Business Solutions (University of Gothenburg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A meeting place where both academics and trade and industry can exchange information and build up research and development operations which will benefit retailing both now and in the future.</td>
<td>Centre for Consumer Science, CFK, was established in 2001 and is the leading research centre in Sweden operating in the field of consumer research. Current research themes are: Gender, fashion and design, Culture, Digitalization, Food, Mobility and National consumption patterns.</td>
<td>Centre for Business (CFA) was established in 2005 as one of the School’s strategic initiatives. The mission, which was awarded the Centre is to ensure the students' future competence as clients and users of IT-related products and services.</td>
</tr>
</tbody>
</table>
GOTHENBURG – CENTER FOR MARKETING
SOME LEADING FIRMS:

Forsman & Bodenfors

Founded in 1986, Forsman & Bodenfors is an independent agency. According to Gunn Report, in 2014 Forsmann & Bodenfors is the most rewarded agency in the world.

www.fb.se/awards

Valentin & Byhr

A house of communication, creating effective communication by integrating cutting-edge strategy, creativity and design. They work with brands like Volvo, SCA, UD Trucks and Santa Maria.

Stylt Trampoli

Stylt was founded in 1991 by Erik Nissen Johansen, a Norwegian visionary and artist with a passion for creative concepts and engaging experiences. From offices in Gothenburg, Sweden, Stylt tackles projects throughout Scandinavia and beyond. So far the portfolio includes over 400 restaurants, about 250 hotels and a variety of destinations.
E-COMMERCE ICT IN GOTEBURG

- Pulsen: eCommerce solutions for retailing
- Viskan Distanshandel: eCommerce solutions for retailing
- Star Republic: eCommerce experts
- 3bits: eCommerce consultants
- WipCore: eCommerce consultants
- JetShop: eCommerce solutions
- Textalk: eCommerce solutions
- Hogia Group: niche eCommerce solutions, ICT for logistics
- Unifaun: Transport Management systems
- Centiro: Transport Management system
- Spectre: ERP software
- Pagero: automating the financial management chain
- NetRelations: Wordpress experts
- Sharespine: Integration specialists
- Collector: online payment solutions
- DIBS: online payment solutions
- Tajitsu: data science
- Plus many more ICT suppliers and consultants
### Connectivity Scorecard

1. Denmark  
2. **Sweden**  
3. US  
4. Netherlands  
5. Finland  
6. UK  
7. Norway  
8. Singapore  
9. Germany  
10. Australia

### Networked Readiness Index

1. Finland  
2. Singapore  
3. **Sweden**  
4. Netherlands  
5. Norway  
6. Switzerland  
7. United Kingdom  
8. Denmark  
9. US  
10. Taiwan, China

### Digital Economy

1. **Sweden**  
2. Denmark  
3. US  
4. Finland  
5. Netherlands

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**SWEDEN CONSISTENTLY RANKS HIGH IN ICT COMPARISONS AS THE LEADING ICT NATION**

Source: Connectivity Scorecard, 2013 & World Economic Forum Network Readiness Index, 2013, Economist Intelligence Unit, 2010
E-COMMERCE SOLUTION PROVIDERS

JetShop provide complete e-commerce solutions with a focus on modern consumers, and in which all the required channels are integrated. They help their customers to succeed online. Today more than 3,000 companies throughout the Nordic region use Jetshop for their e-commerce operations.

Textalk started out in 1979 creating the world’s first digital newspaper for the visually impaired. In the mid-1990s they naturally turned their attention to the Internet and after a request from a customer Textalk Webshop was born. Today it is the platform of choice for 3900 webshops in Sweden.

A supplier of IT solutions for the clothing retail industry since 1964 Pulsen Harmonity, one of their product lines, is a solution for retailers selling online and via mail order. Today, more than 50 years later, Pulsen has grown to be a diversified ICT company with a turnover of close to 2 billion SEK.

Supplier and developer of comprehensive e-commerce solutions with mobile first solutions, efficient logistics flow and subscriptions as some of Viskan Distanshandel’s areas of expertise. Headquartered in Borås Viskan now have 44 employees.
Pagero offers e-order and e-invoice services. The services are independent of ERP system, industry and transaction volume and suit all types of businesses. Pagero has about 140 employees with headquarters in Gothenburg, Sweden. They also have local sales offices in Stockholm, Oslo, Helsinki, Brighton, Dublin, Rome, Madrid and Dubai.

The result of a recent merger between two of Sweden’s leading Transport Management (TM) software vendors, Unifaun is a market leader on the Nordic Market. More than 800 000 shipments registered by over 100 000 companies flow through their TM-systems on a daily basis, which makes them a central part of the Nordic logistics.

With Centiro’s solutions you can assert greater control over your delivery network and turn it into a strategic advantage. Their cloud-based delivery management solutions enable you to quickly and easily on-board new carriers, gain complete visibility into your delivery network and provide your customers with a full-circle brand experience.

The Hogia Group comprises 27 companies in Scandinavia and the United Kingdom with a total of 560 employees. With software as a common denominator, the Hogia Group currently operates in three business areas: finance and business systems, human resource systems and transport systems. The Hogia group offers software solutions for many verticals, including being one of the world leaders in eCommerce solutions for the Ferry Cruise industry.
E-COMMERCE ICT

Wipcore is the partner you need to increase your overall sales using an e-commerce solution. They are a market leader in Sweden relying on more than 17 years of experience in e-commerce. Wipcore have developed and enhanced hundreds of e-commerce solutions.

Star Republic is a team of 60 developers, innovators, creators and project managers with a common passion to change the digital commerce for the better. Since 2003 Star Republic has grown to become one of Sweden’s strenges and most knowledgeable actors in eCommerce.

3bits delivers solutions for everything from web to logistics for e-commerce. E-commerce is so much more than just the web store, so they have personnel who have extensive experience in the backend systems. Their focus on the entire process makes their customers succeed.

Sharespine has a number of integration products to allow their 900 customers to automate the integration between eCommerce platforms and ERP solutions. The clients are distributed all over Scandinavia.
Collector is an innovative digital niche bank that provides financing solutions for private and business customers and eCommerce. Unlike traditional banks, finance companies and law firms, they are not afraid to try new approaches. With a focus on speed, flexibility and technology, they adapt our services and develop new solutions based on our customers' needs.

When DIBS started out in 1998 it was all about solving one particular client’s issue; how to receive payments online. Other clients seemed to have the same issue, and today DIBS is represented in 20 countries with more than 15,000 clients - and a track record of more than 1 billion completed transactions. In DIBS offices in Gothenburg and across the Nordics more than 100 employees are continuously working on making online payments even easier.

Tajitsu was founded in 2011 with the mission to help marketing teams turn data into results. The technology is based on decades of AI research at Chalmers University, Sweden and has been used commercially for over 10 years. In September 2011, Tajitsu Industries was voted to be the second most promising start-up in the commercial gaming market by EIG LaunchPad 2011 (the global i-gaming industry’s main conference and forum). Tajitsu is working with clients around the globe, and has offices in Sweden and Africa.

Based in Skärhamn on the island Tjörn Specter develop and market a web based ERP solution that integrates well with eCommerce solutions, payment solutions and other systems needed for an online retailer. Specter is a rapidly growing company and today has 20 employees.
Volvo Innovation

VOLVO WANTS TO DELIVER YOUR E-COMMERCE PACKAGES DIRECTLY TO YOUR CAR TRUNK

On Tuesday the Swedish-Chinese car company launched its new delivery service. Here’s how it works:

A customer ordering groceries atNetto or toys at Lek客家 will be given the possibility to choose delivery directly to his or her car as an option. A courier from logistics company Postnord drives out to the place where the car is parked, if it is close to the customer’s home, or to an address specified by the customer. The trunk will open with a digital key and the goods will be loaded. When the customer is finished shopping for the day, he or she can just drive home with the goods already in the car.

“This is a solid example of how connected cars can be used to save time and make life a bit more relaxed for us consumers,” the company’s sales and marketing manager Tjörn Amsell says.

Handelslabbet – The Retail Lab

About Handelslabbet - The Retail Lab

Handelslabbet is a Retail Research Laboratory built up as an open innovation lab where researchers and retail professionals meet in order to innovate and stimulate better business.

The innovative work is focused on new business model development, support decision systems for consumers, and digital devices in the food store setting.

The purpose of Handelslabbet is to contribute to retail research and as such, boost innovative and sustainable operations for the future of retail. Handelslabbet has also become an environment engaging suppliers with the latest technology, and a variety of researchers from different disciplines.

Handelslabbet is run by the University of Borås and is a part of the Swedish Institute for Innovative Retailing (SIIR), a research program managed by an academic director and attending research fellow colleagues.

Handelslabbet has also become a natural collaborative environment for people wanting to test new ideas.
WEST SWEDEN’S LOGISTICS ADVANTAGE
APPOINTED SWEDEN’S #1 LOGISTIC LOCATION FOR MORE THAN A DECADE

Leading Logistics Research & Initiatives, including:
❖ Chalmers University of Technology
❖ University of Gothenburg
❖ CLOSER, Lindholmen
❖ Northern Lead
❖ Victoria Swedish ICT
❖ University of Borås
SAMPLES OF MEETING ARENAS & NETWORKS
2016-2017

Meeting arenas:
❖ D-Congress, Svenska Mässan, March 9, 2017
  Sweden's largest gathering of e-commerce professionals
❖ DFOKUS Logistik, Borås, Q3, 2017
  E-commerce & Logistics
❖ Logistik & Transport, Svenska Mässan, November 7-8, 2017
  The leading SCM & transport exhibition in Scandinavia
❖ Quarterly seminars & workshops in Gothenburg gathering Swedish experts

Networks:
❖ Svensk Digital Handel (National)
❖ E-handel 031 (West Sweden)
❖ E-handelsstaden (Borås)
VFM (WORLD’S MOST DANGEROUS MEETING)
E-COMMERCE EVENT IN GOTHENBURG, BY INVITATION
D-Congress is the natural meeting place for those who work with e-commerce, content marketing, IT development, logistics, digital marketing and payment services.

Since 1978, people have come to see and hear the latest innovations and meet key players in the digital commerce.

1,650 people took part in the D-Congress in 2016.

Do not miss your chance to be a part of the digital commerce premier venue - D Congress.
THE OPPORTUNITY
STRATEGIC OPPORTUNITY FOR E-COMMERCE SPECIALISTS

➢ Partnership with local companies,
➢ Investment in and/or acquisition of start-ups,
➢ Establish R&D and consultancy operations for Retail Clothing sector & B2B solutions
THE OPPORTUNITY (CONTD)
STRATEGIC OPPORTUNITY FOR E-COMMERCE SPECIALISTS

REGION HAS A NEED FOR:
➢ E-commerce Specialists (Retail Clothing & B2B)
➢ System Integrators
➢ Business Intelligence for e-Commerce
➢ Virtual Reality – Visualisation for e-Commerce
➢ Block Chain for Supply Chain Management

PARTNER WITH LOCAL ENGINEERING COMPANIES
Lower risk, fast start & transparent cost
➢ eWork
➢ Assistera
➢ Adwise
➢ Swedish Consulting Group
PROPOSED WAY FORWARD

1. Let’s meet to discuss your interest and requirements.

2. Arrange a conference call with industry executives/potential site managers to learn more about the opportunity

3. Arrange a visit to Sweden
   - During the visit interviews and discussions with potential development site managers, key specialists and project managers based on your needs and input
   - Creation of an office or AB (Inc.).

4. Easy and fast set-up. Goals for 2016/2017:
   - Sign up site manager
   - Establish initial management team
   - Hire developers
   - Start 1-2 projects
THE REGION IS IN A DEVELOPMENT LEAP

The business community has a strong position in a global trend
Thank you for listening

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