100% FACTS & FIGURES

About doing business in the Gothenburg region 2019
Welcome to Gothenburg, Sweden, one of the most rapidly expanding regions in Europe and a hotspot for innovation and entrepreneurship

As a hub for Swedish research and development, the Gothenburg region boasts a wealth of innovation clusters and world-renowned academic institutions. In recent years, locally-based companies like Ericsson, the Volvo Group, AstraZeneca, Saab, SKF and Volvo Cars have invested heavily in developing new products and services. This, combined with the successful collaborations between industry, the public sector and academia, has helped make Gothenburg leading within for example areas of automotive, life science, logistics, ICT and urban development.

The Gothenburg region is also in the middle of a historic period of urban development and is making space for 105,000 new homes and 120,000 new jobs. With construction plans worth EUR 100 billion, Gothenburg offers one of Europe’s biggest centrally located urban investment opportunities.

In short, the Gothenburg region’s business environment is flourishing – as you will notice in the following pages. And with the developments taking place and the lifestyle it offers, the region is attracting people, companies and investors like never before. Come join us and let’s shape the future together!

100 billion euros will be invested by 2035

TWO EXAMPLES OF INVESTMENTS BEING MADE

Geely Innovation Centre
Chinese car maker Geely is developing a new innovation centre of over 104,000 sqm in central Gothenburg. The new facility will gather staff working under the Geely umbrella and offer workspaces to other companies and the public.

GoCo Health Innovation City
The life science and health cluster in Mölndal is expanding. A whole new neighbourhood with space for 350 companies and 7,000 people is being developed and the vision is an arena characterised by co-creation.

BUSINESS REGION GÖTEBORG
is responsible for business development in the City of Gothenburg and represents thirteen municipalities in the region.

Photo: Jonas Hierta
A region moving forward

Gothenburg is an attractive region which is experiencing growth through a number of exciting developments. This transformation is illustrated in both national and international comparisons.
Growth strategy – to strengthen central Gothenburg and expand the labour market

The Gothenburg region is growing more rapidly than anyone could have predicted. In addition, major investments are being made in infrastructure and urban development, which in turn has increased commuters and new residents rapidly. By around 2030, it is likely that Trollhättan and Borås will be a part of Gothenburg’s labour market. For this reason, local politicians in the Gothenburg region have adopted a new, offensive growth strategy (Sustainable Growth).

THE FOLLOWING 18 MUNICIPALITIES ARE INCLUDED IN GOTHENBORG’S LABOUR MARKET:

Growth in Gothenburg’s labour market region since the year 2000

- 48,000 more establishments
- 205,000 new residents
- 147,000 more jobs
- 75% real exports growth
- 81% real increase in GRP
- 80% real total wage sum growth
- 55% increase in productivity

Central Gothenburg
+ 45,000 residents 2012–2030
+ 60,000 jobs 2012–2030
+10,000 residents per year
+120,000 jobs 2016–2035

Gothenburg region
Gothenburg’s labour market today
1.2 million residents
Gothenburg’s labour market 2030
1.8 million residents

A local labour market is a division of Sweden based on commuting patterns. When commuting between municipalities reaches the extent that these municipalities can be seen to be dependent on one another, they form a labour market region.
The Gothenburg region – a leading research region which is highly competitive on the international stage

Sweden

OF SWEDEN’S TOTAL PRIVATE R&D INVESTMENTS IN EACH SECTOR RESPECTIVELY OUR LEADING INDUSTRIES ACCOUNT FOR:

Automotive 61%
Chemicals, hygiene products and pharmaceuticals 42%
Knowledge-intensive business services 27%

32% of Sweden’s total R&D investments within the private sector are made in the Gothenburg region*

*Refers to companies’ R&D investments in Västra Götaland County. Source: Statistics Sweden

A NATIONAL CENTRE FOR AI-RELATED RESEARCH AND INNOVATION

AI Innovation of Sweden was established in 2019 at Lindholmen, Gothenburg. The centre provides resources, knowledge, data and capabilities that horizontally are of value to partners and the Swedish AI ecosystem. The focus is on algorithms for applied problems and with possibilities to co-locate in order to share ideas, data and resources across a broad scope of application and research areas in the private and public sectors as well as academia.

GLOBAL RANKING: R&D SHARE OF GDP

1, 2 … 3 … 195, 196

CONNECTIVITY**
EUROPEAN CITIES AND REGIONS OF THE FUTURE 2017/2018
2ND OF 55 MID-SIZED CITIES
Ranks cities and regions in Europe based on their IT and logistics infrastructure. Among mid-sized European cities, Gothenburg is ranked second in terms of connectivity.

Source: fDi

COMPETITIVENESS*
EUROPE 2020
REGIONAL INDEX 2017
27TH OUT OF 263 REGIONS
Assesses how close EU regions are to their target strategies for achieving improved competitiveness. The Gothenburg region has achieved all of its established EU targets and is praised for, among other things:

• Employment
• Higher education level
• R&D

Source: European Commission

INNOVATIONS*
REGIONAL INNOVATION SCOREBOARD 2019
INNOVATION LEADER + AMONG 238 REGIONS
Assesses the innovation performance of European regions. West Sweden is named in the report as a European innovation leader. Among other things, the region achieves distinctions for:

• Increased employment within knowledge-based professions
• Process and product innovations within SME
• Export of high-technology goods

Source: Eurostat

GROWTH POTENTIAL*
PERFORMANCE INDEX 2018
31ST OF 182 REGIONS
Assesses large European city regions with the best future growth potential. The Gothenburg region scores highly in:

• Economic growth
• Employment

Source: BAK Basel

COMPETENCE**
GLOBAL CITIES TALENT COMPETITIVENESS INDEX 2019
33RD OF 114 CITIES
The index ranks cities on their capacity to attract, develop and retain competence. Gothenburg’s ranking is motivated by:

• High quality of life
• Well-functioning ICT infrastructure
• Well-educated population

Source: INSEAD and Adecco

INNOVATIONS* OF SWEDEN’S TOTAL PRIVATE R&D INVESTMENTS IN EACH SECTOR RESPECTIVELY OUR LEADING INDUSTRIES ACCOUNT FOR:

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Source: INSEAD and Adecco
A strong growth engine

Swedish regions show strong economic growth among selected benchmark regions in Europe. Top of the list is the Wolfsburg region, with an annual growth rate of just over 8 per cent. In the Gothenburg region the economic growth over the period was just above 3 per cent.

Growth in Swedish metropolitan regions

The metropolitan regions* drive growth in Sweden. Among the metropolitan regions, Gothenburg’s labour market exhibits the strongest growth in employment. The robust growth in jobs in Gothenburg’s labour market is largely driven by the high value added generated by the region’s goods and services. Gothenburg’s labour market also sees the strongest growth in total wage sum. The most significant growth in value added (gross regional product) is seen in the labour markets of Gothenburg and Stockholm. The three metropolitan regions are clearly growing better than Sweden as a whole.

Sweden’s leading logistics hub

That Scandinavia’s largest port is located here is just one of the reasons the Gothenburg region is such a prominent logistics hub. Some of the reasons the region is ranked as Sweden’s number one logistics location are:

- Direct ocean freight services to 130 destinations
- An effective rail freight system to other parts of Sweden and Norway
- New logistics facilities
- Short distances between the import dock to warehouses result in low logistics costs
- Access to leading competence within logistics
- Advanced and rapidly growing transport infrastructure with an environmental focus
- National centre for R&D within sustainable logistics solutions and transportation

Source: Intelligent Logistik

* Refers to statistics for labour market regions. Source: Statistics Sweden

Source: Statistics Sweden

Source: Intelligent Logistik

Source: Eurostat

Source: Statistics Sweden

* Refers to West Sweden.

** Statistics refer solely to full service ports.
Rich exchange with the world

Shipping and international trade have been integral to the Gothenburg region for almost 400 years. Of course, the traded content has changed somewhat over the years, but the flow of goods continues to play a critical role for the development and growth of the region’s companies. Exports have risen sharply in recent years and every fifth employee in the Gothenburg region works in a foreign-owned company. At the same time, new records are being set for travelling to and from the region.

Unless otherwise specified, the statistics in this and the chapters to come refer to the 13 member municipalities in the Gothenburg region’s municipal association: Ale, Alingsås, Göteborg, Härryda, Kungsbacka, Kungälv, Lerum, Lilla Edet, Melinadal, Partille, Stenungsund, Tjörn and Öckerö.

Exports to the region’s largest trading partners

Despite the record development seen in 2017, trade and industry performed even better in 2018. The real value of the Gothenburg region’s goods exports increased by a full 6 per cent between 2017 and 2018. Norway is an important export market for businesses in the Gothenburg region, followed by the USA. Other key destinations are Germany, China and the UK.

Source: Statistics Sweden

Imports of goods from the region’s key trading partners

In contrast to the Gothenburg region’s goods exports, goods imports into the region grew more slowly between 2017 and 2018. Real growth for the Gothenburg region was 3 per cent, while for Sweden as a whole growth was just over 10 per cent. Germany is the largest country of origin in terms of import volumes, followed by Norway. Other key countries of origin for imports are the Netherlands, the UK, Denmark and China.

Source: Statistics Sweden

The region’s 4,300 export companies constitute approximately two thirds of Västra Götaland County’s total export companies and just over 9 per cent of all Sweden’s export companies.

The composition of imports and exports

The majority of the Gothenburg region’s exported goods comprise vehicles and other means of transport – an industry which is also the largest in terms of import value. The product groups ‘Other machines and manufactured goods,’ ‘Chemical, pharmaceuticals, rubber and plastics,’ and ‘Computers, electronics and optical products’ account for substantial shares of the goods exchanged with trading partners. ‘Other machines and manufactured goods’ accounted for the largest percentage increase in goods exports between 2017 and 2018. In absolute terms, goods exports in automotive increased most growing by more than SEK 18 billion.

Source: Statistics Sweden

KEY EXPORT DESTINATIONS 2018

<table>
<thead>
<tr>
<th>RANK</th>
<th>COUNTRY</th>
<th>VALUE OF EXPORTED GOODS, MSEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Norway</td>
<td>34,285</td>
</tr>
<tr>
<td>2</td>
<td>USA</td>
<td>27,359</td>
</tr>
<tr>
<td>3</td>
<td>Germany</td>
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<td>China</td>
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<td>UK</td>
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<td>6</td>
<td>France</td>
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<tr>
<td>7</td>
<td>Denmark</td>
<td>11,898</td>
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<td>8</td>
<td>Finland</td>
<td>11,440</td>
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<tr>
<td>9</td>
<td>Netherlands</td>
<td>8,854</td>
</tr>
<tr>
<td>10</td>
<td>Japan</td>
<td>5,401</td>
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</tbody>
</table>

Västra Götaland County total 292,407
Gothenburg region total 238,286
Gothenburg region’s share of Swedish exports 17%

KEY IMPORT ORIGINS 2018

<table>
<thead>
<tr>
<th>RANK</th>
<th>COUNTRY</th>
<th>VALUE OF IMPORTED GOODS, MSEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Germany</td>
<td>45,158</td>
</tr>
<tr>
<td>2</td>
<td>Norway</td>
<td>21,574</td>
</tr>
<tr>
<td>3</td>
<td>Netherlands</td>
<td>17,661</td>
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<td>4</td>
<td>UK</td>
<td>16,627</td>
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<tr>
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<td>Denmark</td>
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<tr>
<td>6</td>
<td>China</td>
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<tr>
<td>7</td>
<td>France</td>
<td>9,728</td>
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<tr>
<td>8</td>
<td>USA</td>
<td>5,952</td>
</tr>
<tr>
<td>9</td>
<td>Japan</td>
<td>5,670</td>
</tr>
<tr>
<td>10</td>
<td>Finland</td>
<td>5,095</td>
</tr>
</tbody>
</table>

Västra Götaland County total 259,701
Gothenburg region total 205,618
Gothenburg region’s share of Swedish imports 15%

EXPORTS AND IMPORTS OF GOODS, BY PRODUCT GROUP 2018

<table>
<thead>
<tr>
<th>Category</th>
<th>Value of exported goods, MSEK</th>
<th>Value of imported goods, MSEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Motor vehicles and other transport equipment</td>
<td><img src="image" alt="Motor vehicles and other transport equipment" /></td>
<td><img src="image" alt="Motor vehicles and other transport equipment" /></td>
</tr>
<tr>
<td>Other machines and manufactured goods</td>
<td><img src="image" alt="Other machines and manufactured goods" /></td>
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</tr>
<tr>
<td>Chemical, pharmaceuticals, rubber and plastics</td>
<td><img src="image" alt="Chemical, pharmaceuticals, rubber and plastics" /></td>
<td><img src="image" alt="Chemical, pharmaceuticals, rubber and plastics" /></td>
</tr>
<tr>
<td>Computers, electronics and optical products</td>
<td><img src="image" alt="Computers, electronics and optical products" /></td>
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</tr>
<tr>
<td>Coke and petroleum</td>
<td><img src="image" alt="Coke and petroleum" /></td>
<td><img src="image" alt="Coke and petroleum" /></td>
</tr>
<tr>
<td>Wood, paper and printing services</td>
<td><img src="image" alt="Wood, paper and printing services" /></td>
<td><img src="image" alt="Wood, paper and printing services" /></td>
</tr>
<tr>
<td>Basic metals and fabricated metal products</td>
<td><img src="image" alt="Basic metals and fabricated metal products" /></td>
<td><img src="image" alt="Basic metals and fabricated metal products" /></td>
</tr>
<tr>
<td>Textiles and clothing</td>
<td><img src="image" alt="Textiles and clothing" /></td>
<td><img src="image" alt="Textiles and clothing" /></td>
</tr>
<tr>
<td>Products connected to services</td>
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<td><img src="image" alt="Products connected to services" /></td>
</tr>
<tr>
<td>Food, beverages and tobacco</td>
<td><img src="image" alt="Food, beverages and tobacco" /></td>
<td><img src="image" alt="Food, beverages and tobacco" /></td>
</tr>
<tr>
<td>Products of agriculture, forestry and fishing</td>
<td><img src="image" alt="Products of agriculture, forestry and fishing" /></td>
<td><img src="image" alt="Products of agriculture, forestry and fishing" /></td>
</tr>
<tr>
<td>Mining and quarrying</td>
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</tr>
</tbody>
</table>

Source: Statistics Sweden
Since 2010, the business environment in the Gothenburg region has seen strong exports growth. In 2017, the region recorded a real increase in goods exports of 13 per cent. This was followed by a further 6 per cent increase in 2018.

Source: Statistics Sweden

Since 1990, the number of foreign-owned companies in the Gothenburg region has grown steadily. In 2017 there were approximately 2,400 foreign-owned companies in the Gothenburg region. These foreign-owned companies accounted for approximately 3,000 establishments in the Gothenburg region. From 2016 to 2017, the number of foreign-owned companies in the Gothenburg region increased by around 100 companies.

Source: Statistics Sweden

The number of employees in foreign-owned companies almost quadrupled in the period 1990–2017. In 2017, some 88,000 people were employed by foreign-owned companies in the Gothenburg region. Of these, Chinese companies employ the most, followed by companies from the USA, Norway and Denmark.

Source: Statistics Sweden

The list of countries with foreign ownership in the Gothenburg region is dominated by the northern parts of Western Europe. Norway tops the list as the country of ownership for the most foreign-owned companies, followed by Germany and Denmark. Denmark represented the largest increase in the number of foreign-owned companies in 2017, while the UK represented the largest decrease.

Source: Statistics Sweden

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Source: Statistics Sweden

The highest value of goods exports per employee

That the Gothenburg region’s companies are export-intensive can be ascertained by studying exports per employee in the private sector. In 2018, the value of exports from companies in the Gothenburg region corresponded to SEK 634,000 per employee in the private sector. This is substantially higher compared to the other two metropolitan regions and Sweden as a whole.

Source: Statistics Sweden

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Source: Statistics Sweden
Record numbers of trips to and from the region and overnight stays

Gothenburg Landvetter Airport once again set a new record in 2018 with more than 6.8 million air passengers. Never before have so many air travellers journeyed to and from the Gothenburg region’s airport. The region’s hotels, holiday cottages and hostels also experienced a strong 2018, once again recording a record number of overnight stays, more than 4.8 million. Norwegians are the most numerous visitors, followed by German, British, American, Danish and Chinese travellers.

Source: Swedish Transport Agency and Statistics Sweden

Growing international population in the region

In 2018, the Gothenburg region had about 211,000 foreign-born residents (just over 20 per cent of the region’s population). Compared with the previous year, this is an increase of just over 10,500 foreign-born residents, equivalent to an increase of just over 5 per cent. Iraq, Iran and Syria top the list of countries of birth among the Gothenburg region’s foreign-born population. In terms of changes between 2017 and 2018, foreign-born residents from Syria represent the largest increase, in both percentage and number.

Source: Statistics Sweden

Growth and labour market

The business environment in the Gothenburg region is characterised by global, knowledge-intensive manufacturing companies such as Volvo, SKF and AstraZeneca. The total wage sum in the Gothenburg region is growing at a faster rate than Sweden as a whole and other metropolitan regions. Above all, this growth is most prominent within construction and services. Overall, employment in the region is growing at a faster rate than the national average. A rapidly expanding knowledge-intensive business services sector supports the manufacturing companies, and the region’s business environment is gaining further nuance through growing businesses in information and communication, hotels and restaurants, construction and real estate.
The Gothenburg region – a Swedish growth engine

In 2018, total wage sum in the Gothenburg region grew by 4 per cent in real terms. The Gothenburg region experienced a higher rate of real growth in total wage sum than Sweden as a whole, which increased by 2.9 per cent.

Source: Statistics Sweden

ANNUAL REAL GROWTH IN TOTAL WAGE SUM 2001–2018

Construction and services have grown the most

The average annual growth in total wage sum in the Gothenburg region during the period 2000–2018 was 3.5 per cent. In terms of individual sectors, the largest growth has been seen in the construction sector, followed by the services sector. The construction sector has many major development projects in the region during the coming years. In addition, the highly refined services offered by various companies and a growing public sector are contributing more and more to the region’s economy.

Source: Statistics Sweden

AVERAGE ANNUAL REAL GROWTH IN TOTAL WAGE SUM BY SECTOR IN THE GOTHENBURG REGION 2000–2018

Care and healthcare sector the largest employer

Care and healthcare is the sector with the most employees in the Gothenburg region, followed by business services, which has experienced strong employment growth in recent years. Compared to Sweden as a whole, the Gothenburg region has a larger share of employees in business services, commerce, manufacturing, transportation, and information and communication. However, compared to Sweden as a whole, the Gothenburg region has a smaller proportion of employees in care and healthcare, public administration, education, construction, and finance and insurance.

Source: Statistics Sweden

EMPLOYMENT +16 YEARS OF AGE, BY SECTOR 2017

The number of employees is growing faster in the Gothenburg region than Sweden as a whole

In 2017, more than 530,000 people were working in the Gothenburg region. This represents an increase of 33 per cent since the year 2000, or 132,000 people.

Source: Statistics Sweden

EMLOYMENT GROWTH IN THE GOTHENBURG REGION AND SWEDEN 2001–2017
Greatest job growth in business services

All sectors in the Gothenburg region have seen an increase in the number of employees following the financial crisis in 2008. Swedish manufacturing and mining has experienced negative growth, while the Gothenburg region's manufacturing and mining industry is heading in the other direction. Much of this development is explained by the fact that the Gothenburg region's knowledge-intensive manufacturing industry has made very strong progress in recent years. However, business services has experienced the most growth in the Gothenburg region, followed by information and communication. Compared to Sweden as a whole, the Gothenburg region has clearly experienced more growth in employment within information and communication, manufacturing, business services and construction.

Lowest unemployment among metropolitan regions

In 2007, both the Gothenburg region and Sweden as a whole reported largely similar unemployment. The positive development seen in employment in the Gothenburg region from the year 2010 onwards has resulted in a continued fall in unemployment. Unemployment in the Gothenburg region averaged 5.6 per cent in 2018, the lowest among the country’s metropolitan regions, and some 1.5 percentage points lower than the national average.

Small companies experiencing the most rapid growth in employees

Since 2008, companies with 1–4 employees have experienced the strongest growth in the Gothenburg region. During the period 2008–2018, employees in companies with 1–4 employees increased by 20 per cent. Companies with 5–19 and 20–199 employees and the region’s largest companies also demonstrate strong growth in terms of employees. However, in absolute terms, companies in the region with 20–199 employees and the very largest companies report the largest increase. Some 59,000 people were hired by companies in these two size categories during the period 2008–2018.

Small companies account for the majority of the region’s establishments

The Gothenburg region’s numerous small companies provide the majority of the region’s establishments (approximately 87 per cent of the establishments have less than 5 employees). The sector with the largest number of establishments, more than 20,000, is business services, with a clear majority made up of smaller establishments. Commerce and personal and cultural services also have many establishments in the region. Commerce, however, has more establishments in the size category 5–19 employees. The share of establishments with 200+ employees is largest within public administration, care and healthcare, transportation, manufacturing and education.

117,238 establishments in the Gothenburg region in 2018

The following table shows the number of establishments in the Gothenburg region in 2018, by sector and size category.

<table>
<thead>
<tr>
<th>SECTOR</th>
<th>ESTABLISHMENTS WITH NO EMPLOYEES</th>
<th>1-4 EMPLOYEES</th>
<th>5-19 EMPLOYEES</th>
<th>20-199 EMPLOYEES</th>
<th>200+ EMPLOYEES</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business services</td>
<td>16,565</td>
<td>7,575</td>
<td>1,539</td>
<td>656</td>
<td>52</td>
<td>26,387</td>
</tr>
<tr>
<td>Commerce</td>
<td>7,572</td>
<td>4,301</td>
<td>2,463</td>
<td>611</td>
<td>18</td>
<td>14,965</td>
</tr>
<tr>
<td>Personal and cultural services</td>
<td>11,198</td>
<td>2,287</td>
<td>597</td>
<td>152</td>
<td>7</td>
<td>14,241</td>
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<td>Property</td>
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<tr>
<td>Construction</td>
<td>4,705</td>
<td>3,195</td>
<td>1,133</td>
<td>372</td>
<td>9</td>
<td>9,414</td>
</tr>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>8,033</td>
<td>230</td>
<td>49</td>
<td>5</td>
<td>0</td>
<td>8,317</td>
</tr>
<tr>
<td>Information and communication</td>
<td>4,594</td>
<td>2,259</td>
<td>460</td>
<td>208</td>
<td>16</td>
<td>7,537</td>
</tr>
<tr>
<td>Healthcare and care</td>
<td>2,675</td>
<td>1,332</td>
<td>905</td>
<td>531</td>
<td>49</td>
<td>5,492</td>
</tr>
<tr>
<td>Manufacturing and mining</td>
<td>2,737</td>
<td>1,092</td>
<td>594</td>
<td>266</td>
<td>31</td>
<td>4,720</td>
</tr>
<tr>
<td>Education</td>
<td>2,432</td>
<td>509</td>
<td>856</td>
<td>612</td>
<td>24</td>
<td>4,433</td>
</tr>
<tr>
<td>Hotels and restaurants</td>
<td>1,177</td>
<td>1,293</td>
<td>833</td>
<td>186</td>
<td>2</td>
<td>3,491</td>
</tr>
<tr>
<td>Transportation</td>
<td>1,506</td>
<td>1,051</td>
<td>461</td>
<td>250</td>
<td>25</td>
<td>3,293</td>
</tr>
<tr>
<td>Financial services and insurance</td>
<td>2,179</td>
<td>529</td>
<td>164</td>
<td>49</td>
<td>7</td>
<td>2,928</td>
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<tr>
<td>Unknown</td>
<td>647</td>
<td>68</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>718</td>
</tr>
<tr>
<td>Energy and the environment</td>
<td>273</td>
<td>86</td>
<td>49</td>
<td>40</td>
<td>2</td>
<td>450</td>
</tr>
<tr>
<td>Public administration</td>
<td>17</td>
<td>34</td>
<td>58</td>
<td>150</td>
<td>33</td>
<td>292</td>
</tr>
<tr>
<td>Gothenburg region total</td>
<td>75,203</td>
<td>27,186</td>
<td>10,407</td>
<td>4,163</td>
<td>279</td>
<td>117,238</td>
</tr>
</tbody>
</table>

Office-based employees in the Gothenburg region will increase by 100,000 from today’s 150,000 employees to around 250,000 employees in 2035

Source: Evidens
Knowledge-intensive industries are largest

The majority of the largest companies in the Gothenburg region engage in research and development at a world-leading level. Volvo Cars, with its development and production in Torslanda, is the single largest private employer in the Gothenburg region. Volvo Cars is also the company that had the greatest increase in number of employees during 2018. In total, the Volvo Group has over 12,400 employees in the Gothenburg region. New on the top-10 list in 2018 is Skanska.

Source: Statistics Sweden

<table>
<thead>
<tr>
<th>RANK</th>
<th>COMPANY</th>
<th>NUMBER OF EMPLOYEES 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volvo Cars</td>
<td>16,475</td>
</tr>
<tr>
<td>2</td>
<td>Volvo Trucks*</td>
<td>4,375</td>
</tr>
<tr>
<td>3</td>
<td>Chalmers University of Technology</td>
<td>3,275</td>
</tr>
<tr>
<td>4</td>
<td>SKF</td>
<td>2,450</td>
</tr>
<tr>
<td>5</td>
<td>Postnord</td>
<td>2,375</td>
</tr>
<tr>
<td>6</td>
<td>AstraZeneca</td>
<td>2,125</td>
</tr>
<tr>
<td>7</td>
<td>Samhall</td>
<td>1,875</td>
</tr>
<tr>
<td>8</td>
<td>Ericsson</td>
<td>1,725</td>
</tr>
<tr>
<td>9</td>
<td>Skanska</td>
<td>1,625</td>
</tr>
<tr>
<td>10</td>
<td>Essity</td>
<td>1,425</td>
</tr>
</tbody>
</table>

* Part of the Volvo Group, which employs a total of 12,400 people in the Gothenburg region.

Home to Sweden’s two largest companies

The list of the companies reporting the highest turnover is topped by the Volvo Group, which is in fact the company with the highest turnover in Sweden. In second place is Volvo Cars, Sweden’s second largest company by turnover, followed by SKF, the Stena sphere and Carl Bennet.

* Only companies with their head office in the Gothenburg region.

Source: www.va500.se

<table>
<thead>
<tr>
<th>RANK</th>
<th>COMPANY</th>
<th>TURNOVER 31-12-2017, MSEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volvo Group</td>
<td>336,291</td>
</tr>
<tr>
<td>2</td>
<td>Volvo Cars</td>
<td>214,166</td>
</tr>
<tr>
<td>3</td>
<td>SKF</td>
<td>77,938</td>
</tr>
<tr>
<td>4</td>
<td>Stena sphere*</td>
<td>55,388</td>
</tr>
<tr>
<td>5</td>
<td>Carl Bennet**</td>
<td>49,784</td>
</tr>
<tr>
<td>6</td>
<td>Bilia</td>
<td>25,509</td>
</tr>
<tr>
<td>7</td>
<td>Cellmark</td>
<td>24,435</td>
</tr>
<tr>
<td>8</td>
<td>Ekman &amp; Co</td>
<td>16,003</td>
</tr>
<tr>
<td>9</td>
<td>Capio</td>
<td>15,425</td>
</tr>
<tr>
<td>10</td>
<td>Mölnlycke Health Care</td>
<td>10,710</td>
</tr>
</tbody>
</table>

* Part of the Volvo Group, which includes Stena Metall, Stena Sessan and Concordia Maritime.
** Reported here as a group including Getinge, Lifco, Elanders, Dragesholm and Symbio.

Companies with the highest market value

One more way of assessing a company’s size is to consider its market value. Of the companies based in the Gothenburg region, the Volvo Group tops the list followed by the investment company Latour, SKF and the real estate companies Balder, Castellum and Wallenstam. The real estate company Platzer improved from 10th on the list in 2017 to 8th in 2018.

* Only listed companies with their head office in the Gothenburg region.

Source: Avanza

<table>
<thead>
<tr>
<th>RANK</th>
<th>COMPANY</th>
<th>MARKET VALUE 31-12-2018, MSEK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Volvo Group</td>
<td>300,059</td>
</tr>
<tr>
<td>2</td>
<td>Latour</td>
<td>78,764</td>
</tr>
<tr>
<td>3</td>
<td>SKF</td>
<td>74,025</td>
</tr>
<tr>
<td>4</td>
<td>Balder</td>
<td>51,624</td>
</tr>
<tr>
<td>5</td>
<td>Castellum</td>
<td>48,247</td>
</tr>
<tr>
<td>6</td>
<td>Wallenstam</td>
<td>29,847</td>
</tr>
<tr>
<td>7</td>
<td>Getinge</td>
<td>29,225</td>
</tr>
<tr>
<td>8</td>
<td>Plattzer</td>
<td>8,959</td>
</tr>
<tr>
<td>9</td>
<td>Bilia</td>
<td>8,506</td>
</tr>
<tr>
<td>10</td>
<td>Collector</td>
<td>5,175</td>
</tr>
</tbody>
</table>

LARGEST COMPANIES IN THE GOTEBORG REGION BY NUMBER OF EMPLOYEES

LARGEST COMPANIES IN THE GOTEBORG REGION BY TURNOVER

LARGEST LISTED COMPANIES IN THE GOTEBORG REGION BY MARKET VALUE

Business

The Gothenburg region is home to a broad and multifaceted business environment. 92 per cent of Sweden’s industries are represented here, with a total of 752 industries identified in the region. Some of the world’s leading companies within their sectors are headquartered in the region. The Gothenburg region is also characterised by a strong entrepreneurial spirit and over 7,100 companies were started in 2018.
Every tenth start-up is established in the Gothenburg region

The Gothenburg region is making great efforts to facilitate the start-up process for entrepreneurs. Since 2000, the number of start-ups has nearly doubled. In 2018, over 7,100 new companies were started in the Gothenburg region, corresponding to 11 per cent of all start-ups in Sweden.

Source: Growth Analysis

BUSINESS

In 2017, the total turnover in the Gothenburg region was over SEK 1,267 billion. Commerce and manufacturing and mining accounted for more than half of the region’s total turnover. Business services, transportation and construction also constitute a significant portion of the region’s turnover.

Source: Statistics Sweden

The region’s private sector generated high value added

The highest value added in the Gothenburg region comes from business services, followed by manufacturing and commerce. Together they contribute nearly three-fifths of the region’s total value added, which amounts to SEK 540 billion. A reason why business services contributes greatly is that companies such as Volvo Cars, the Volvo Group, AstraZeneca, SKF and Ericsson have sub-activities that are included in this specific sector. This is also a sign that the traditional industrial production has integrated a growing number of technology services as the goods for the final consumer become more and more advanced.

Source: Statistics Sweden

Investments in housing and offices in the Gothenburg region

Large construction projects will proliferate in the coming years. During 2017 over SEK 60 billion was invested in facilities, housing and office premises in the Gothenburg region. The forecast for 2018 indicates investment volumes totalling SEK 66 billion. Between 2016 and 2035, investment volumes in the Gothenburg region are expected to amount to over SEK 1,000 billion.

Source: Swedish Construction Federation

Value added in MSEK by sector 2017

<table>
<thead>
<tr>
<th>INDUSTRY</th>
<th>VALUE ADDED 2017, MSEK</th>
<th>PERCENTAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business services</td>
<td>127,277</td>
<td>23.6%</td>
</tr>
<tr>
<td>Manufacturing and mining</td>
<td>95,007</td>
<td>17.6%</td>
</tr>
<tr>
<td>Commerce</td>
<td>81,531</td>
<td>15.1%</td>
</tr>
<tr>
<td>Construction</td>
<td>45,014</td>
<td>8.3%</td>
</tr>
<tr>
<td>Real estate</td>
<td>40,068</td>
<td>7.4%</td>
</tr>
<tr>
<td>Transportation</td>
<td>39,171</td>
<td>7.3%</td>
</tr>
<tr>
<td>Information and communication</td>
<td>33,944</td>
<td>6.3%</td>
</tr>
<tr>
<td>Health care and care</td>
<td>16,139</td>
<td>3.0%</td>
</tr>
<tr>
<td>Hotel and restaurants</td>
<td>14,512</td>
<td>2.7%</td>
</tr>
<tr>
<td>Finance and insurance</td>
<td>13,895</td>
<td>2.6%</td>
</tr>
<tr>
<td>Personal and cultural services</td>
<td>10,757</td>
<td>2.0%</td>
</tr>
<tr>
<td>Agriculture, forestry and fishing</td>
<td>2,456</td>
<td>0.5%</td>
</tr>
<tr>
<td>Public authorities</td>
<td>2,943</td>
<td>0.2%</td>
</tr>
<tr>
<td>Gothenburg region total</td>
<td>539,708</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Number of start-up companies in the Gothenburg region 2000–2018

In 2017, the total turnover in the Gothenburg region was over SEK 1,267 billion. Commerce and manufacturing and mining accounted for more than half of the region’s total turnover. Business services, transportation and construction also constitute a significant portion of the region’s turnover.

Source: Statistics Sweden
Strong clusters in the Gothenburg region

In the Gothenburg region there are many clusters that contribute to the region’s strong innovation capacity and competitiveness. Here are several examples.

**AUTOMOTIVE**
The automotive cluster in the Gothenburg region is world leading in safety, electrification, autonomous engineering technology and connected vehicles. The region’s automotive cluster is home to OEMs such as Volvo Cars, the Volvo Group, Geely, CEVT and NEVS, as well as to many large and specialized tech, design and service suppliers to the automotive industry.

**LIFE SCIENCE**
Life science is one of the fastest growing industries in Gothenburg. Here you find one of Europe’s largest university hospitals and one of AstraZeneca’s three globally strategic R&D centres. In the coming years, the life science cluster will be further strengthened with major investments being made in Sahlgrenska Life and the new health cluster GoCo Health Innovation City.

**ICT**
The Gothenburg region is home to cutting edge expertise in several fields. The ICT companies in the region hold a strong position in areas such as embedded systems, infrastructure and cloud, microwaves, mobile technologies as well as visualisation and gaming.

**ENERGY**
The energy production in the Gothenburg region is complete with power generated from wind, water, solar, nuclear and waste. Gothenburg is a world leader with its extensive district heating network and has the world’s most efficient energy recoveries from waste. The region is also home to Sweden’s largest existing and planned solar cell parks.

**MARITIME**
Gothenburg is the leading port in the Nordics and the city is a centre for research and development within marine energy extraction, biotechnology and maritime operations as well as fisheries and aquaculture.

**TRANSPORTATION AND LOGISTICS**
The Gothenburg region is Scandinavia’s most important logistics hub. Here you find leading competence within logistics and advanced transportation infrastructure. The region is the national centre for R&D within sustainable logistics and transportation solutions.

**CLEANTECH**
The cleantech cluster is strongly linked to other industries in the Gothenburg region in areas such as energy efficiency, renewable fuels and renewable energy, electromobility, waste systems and air and water treatment. The companies are suppliers in these areas with both technology and service production. The City of Gothenburg has long been at the forefront in setting environmental and climate requirements and this has driven the development in the cleantech cluster.

Source: Statistics Sweden and Business Region Göteborg, all statistics refer to employees in 2016.
Population, lifestyle and education

More and more people are choosing to live in the Gothenburg region and in 2018 its population was more than one million people. The population is relatively young and more highly educated than the national average. Access to academic education and world-class companies makes the region more attractive. The Gothenburg region’s two universities collectively have around 60,000 students. In terms of human capital and lifestyle, Gothenburg ranks highly among mid-sized European cities.

Living in a growing region

Every year since 2000, the Gothenburg region’s population has increased by around one per cent, with the region seeing greater growth than Sweden as a whole throughout the entirety of the 2000s. In 2018, the population increased the most among the 25–34 age group, with some 5,000 additional people within this cohort. A large increase was also seen in the 5–14 age group, with more than 2,600 new residents.

Source: Statistics Sweden

Population growth continuing

For many years, the Gothenburg region has had birth and migration surpluses. In 2018, the region’s population increased by about 16,000 residents. If the annual growth rate of around 10,000 residents continues, the region will be home to just over 1.2 million people in 2035.

Source: Statistics Sweden and Västra Götaland region

1,028,248 residents in the Gothenburg region during 2018

Younger than the national average

A comparison with Sweden’s average age breakdown for 2018 shows that the Gothenburg region has a relatively young population. The 0–24 age group is larger than the national average while the 45–65 age group is smaller.

Source: Statistics Sweden
1 billion SEK was the net cost for culture in the Gothenburg region in 2017. Per inhabitant, the Gothenburg region’s cost for culture is just over SEK 1,100, which is higher than the corresponding cost per inhabitant in the Stockholm region.

Source: Swedish Agency for Cultural Policy Analysis

Approximately 60,000

The region’s two largest seats of learning are the University of Gothenburg, with some 48,000 students, and Chalmers University of Technology, with just over 10,000 students. Both universities are among the world’s best in several research fields.

Source: University of Gothenburg and Chalmers University of Technology

10th place

Among Europe’s medium-sized cities, Gothenburg ranks tenth in the category Human Capital and Lifestyle.

Source: fDi

Costs and taxes

The Gothenburg region is a competitive location for businesses. The corporate tax rate is low and the rental market is among the hottest in Europe. In addition, foreign key workers in Sweden are granted a certain degree of tax relief.

The world’s second-smartest city

Gothenburg is ranked as the world’s second-smartest city. The assessment is based on a number of indicators, such as access to free Wi-Fi, smart solutions in public transport and 4G and 5G network connectivity.

Source: Future Today Institute

Most common professions among the population

Public sector
1. Primary school teacher and preschool teacher
2. Assistant nurse
3. Childcare worker and teaching assistant
4. Attendant, carer and personal assistant
5. Nurse

Private sector
1. Retail staff
2. Engineer
3. Insurance advisor, salesperson and purchaser
4. IT architect, system developer and testing manager
5. Office assistant

Source: Statistics Sweden, relating to 2017

Source: Statistics Sweden, relating to 2017

So many highly-educated technology workers switch employer each year in the Gothenburg region – benefiting productivity.

Source: Statistics Sweden and CIRCLE
**Employer contributions**

All employers pay social security contributions for their employees. These comprise contributions for pensions, health care and other social benefits. The contributions amount to a total of 31.42 per cent.  

Source: The Swedish Tax Agency

25% tax relief for foreign key staff during their first three years in Sweden

Source: The Swedish Tax Agency

**Salary levels in the Gothenburg region**

Presenting income distribution using percentiles gives a good picture of the most common wage levels. In this table, the figure in the column for the 10th percentile corresponds to the maximum wage earned by 10 per cent of that category. An example, 10 per cent of the sales persons in commerce earn SEK 23,800 or less, whereas 60 per cent of the same profession category wage earned by 10 per cent of that category.

In this table, the figure in the column for the 10th percentile gives a good picture of the most common wage levels.

**Employee contributions**

Source: Almega, September 2018  

*The numbers are rounded to the nearest hundred.

**Office rental**

Office rental prices vary considerably between different districts in Gothenburg. The map below provides an overview of the various areas of Gothenburg, with a summary of rental prices for these areas listed to the right. The highest rents are in the Central Business District (CBD), while the lowest rents are observed in West Gothenburg.

**COSTS AND TAXES**

**MARKET SALARY STATISTICS 2018**

<table>
<thead>
<tr>
<th>PROFESSION</th>
<th>10TH PER - CENTILE</th>
<th>25TH PER - CENTILE</th>
<th>50TH PER - CENTILE</th>
<th>75TH PER - CENTILE</th>
<th>90TH PER - CENTILE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Economics and finance managers</td>
<td>38,500</td>
<td>56,700</td>
<td>69,100</td>
<td>110,300</td>
<td>166,000</td>
</tr>
<tr>
<td>Economics and finance operations managers</td>
<td>38,000</td>
<td>51,400</td>
<td>60,700</td>
<td>89,100</td>
<td>147,000</td>
</tr>
<tr>
<td>Human resources managers</td>
<td>40,000</td>
<td>55,300</td>
<td>68,200</td>
<td>104,800</td>
<td>168,000</td>
</tr>
<tr>
<td>Human resources operations managers</td>
<td>40,000</td>
<td>53,000</td>
<td>62,500</td>
<td>91,500</td>
<td>141,000</td>
</tr>
<tr>
<td>Management and planning managers</td>
<td>46,400</td>
<td>66,100</td>
<td>80,000</td>
<td>148,000</td>
<td>204,000</td>
</tr>
<tr>
<td>Management and planning operations managers</td>
<td>34,200</td>
<td>45,300</td>
<td>52,500</td>
<td>80,000</td>
<td>124,000</td>
</tr>
<tr>
<td>Sales and marketing managers</td>
<td>42,600</td>
<td>58,900</td>
<td>68,300</td>
<td>101,500</td>
<td>157,000</td>
</tr>
<tr>
<td>Sales and marketing operations managers</td>
<td>39,500</td>
<td>54,900</td>
<td>63,900</td>
<td>83,300</td>
<td>121,000</td>
</tr>
<tr>
<td>IT managers</td>
<td>45,600</td>
<td>61,200</td>
<td>71,700</td>
<td>109,800</td>
<td>168,000</td>
</tr>
<tr>
<td>IT operations managers</td>
<td>43,100</td>
<td>58,000</td>
<td>64,300</td>
<td>82,900</td>
<td>118,000</td>
</tr>
<tr>
<td>Managers in information, communication and PR</td>
<td>41,500</td>
<td>62,400</td>
<td>76,200</td>
<td>111,300</td>
<td>168,000</td>
</tr>
<tr>
<td>Operations managers in information, communication and PR</td>
<td>36,600</td>
<td>52,600</td>
<td>59,700</td>
<td>82,700</td>
<td>124,000</td>
</tr>
<tr>
<td>Managers in purchase, logistics and transport</td>
<td>35,600</td>
<td>52,900</td>
<td>63,200</td>
<td>88,800</td>
<td>134,000</td>
</tr>
<tr>
<td>Operations managers in purchase, logistics and transport</td>
<td>35,700</td>
<td>49,200</td>
<td>59,100</td>
<td>79,600</td>
<td>119,000</td>
</tr>
<tr>
<td>Auditors, accountants and economists</td>
<td>27,200</td>
<td>37,500</td>
<td>45,000</td>
<td>63,700</td>
<td>91,600</td>
</tr>
<tr>
<td>Organisation development experts</td>
<td>33,800</td>
<td>44,000</td>
<td>51,100</td>
<td>69,600</td>
<td>101,000</td>
</tr>
<tr>
<td>Market analysts and marketing specialists</td>
<td>32,200</td>
<td>41,800</td>
<td>48,500</td>
<td>65,600</td>
<td>92,800</td>
</tr>
<tr>
<td>Systems analysts and software engineers</td>
<td>36,000</td>
<td>46,100</td>
<td>51,100</td>
<td>62,400</td>
<td>91,600</td>
</tr>
<tr>
<td>Software and systems developers</td>
<td>31,500</td>
<td>40,000</td>
<td>45,300</td>
<td>55,700</td>
<td>72,100</td>
</tr>
<tr>
<td>Engineers and technicians in construction</td>
<td>29,000</td>
<td>34,400</td>
<td>39,000</td>
<td>52,600</td>
<td>72,100</td>
</tr>
<tr>
<td>Engineers and technicians in electric technology</td>
<td>29,800</td>
<td>37,000</td>
<td>42,000</td>
<td>54,700</td>
<td>79,000</td>
</tr>
<tr>
<td>Engineers and technicians in chemistry and chemical engineering</td>
<td>29,500</td>
<td>36,200</td>
<td>41,200</td>
<td>53,700</td>
<td>79,000</td>
</tr>
<tr>
<td>Computer technicians</td>
<td>26,000</td>
<td>33,900</td>
<td>38,400</td>
<td>47,600</td>
<td>76,000</td>
</tr>
<tr>
<td>Company sales staff</td>
<td>27,900</td>
<td>38,100</td>
<td>44,800</td>
<td>58,900</td>
<td>81,300</td>
</tr>
<tr>
<td>Purchasers</td>
<td>30,800</td>
<td>38,900</td>
<td>43,900</td>
<td>58,700</td>
<td>81,300</td>
</tr>
<tr>
<td>Administrative assistants</td>
<td>22,300</td>
<td>28,400</td>
<td>31,500</td>
<td>40,200</td>
<td>62,300</td>
</tr>
<tr>
<td>Sales person in commerce</td>
<td>23,800</td>
<td>28,000</td>
<td>30,400</td>
<td>40,300</td>
<td>60,600</td>
</tr>
</tbody>
</table>

**Source:** KPMG, 2019

**Comparison of taxes**

Since 2013, Sweden has become one of the most attractive places in the world for holding companies. Sweden offers more than 80 tax agreements in addition to the low corporate tax rate. Sweden’s tax climate also holds up well in comparison to other countries, as companies are not taxed on interest income, share dividends and royalties.

Source: Deloitte, 2019

**Corporate tax rates – a European comparison 2019**

<table>
<thead>
<tr>
<th>TYPE OF TAX</th>
<th>Sweden</th>
<th>Denmark</th>
<th>Finland</th>
<th>France</th>
<th>Germany</th>
<th>Netherlands</th>
<th>UK</th>
<th>USA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interest</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Dividends</td>
<td>0%</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
<td>25%</td>
<td>0%</td>
<td>0%</td>
<td>30%</td>
</tr>
<tr>
<td>Royalties</td>
<td>0%</td>
<td>22%</td>
<td>20%</td>
<td>33%</td>
<td>15%</td>
<td>0%</td>
<td>20%</td>
<td>30%</td>
</tr>
</tbody>
</table>

* Rates apply to payments to non-residents.

**WITHHOLDING TAX RATES** 2018
Climate, environment and sustainable development

The Gothenburg region boasts world-leading competence in sustainable development and clean technology solutions. The region has numerous partnerships involving energy, smart urban development, transport and waste management, aiming to reduce impact on the environment. An area that has met considerable success is district heating and district cooling. Another sign that the region is heading in the right direction in its work with the environment, climate and sustainable development is that the interest in green bonds has been huge, and new issues of green bonds have been proliferating at record pace.
Better air quality in Gothenburg

For decades, Gothenburg has worked actively to continuously improve the city's air quality. Sulphur emissions have been cut by almost 100 per cent and are close to zero. Over the longer term, Gothenburg has reduced airborne nitrogen dioxide levels. During the past 10 years, the city has even managed to reverse the upward trend in coarse particulate matter levels (PM10).

*Statistics in the figures refer to Sävenäs waste management. Even though the city has a far-reaching district heating network in Gothenburg, the Gothenburg region covers some 1,230 km2 in length. It heats 90 per cent of the electricity demand in Gothenburg. In addition, 60 per cent of electricity produced comes from biogas.

Recycled energy keeps us warm

Gothenburg is highly competent when it comes to waste management. Even though the city incinerates more waste than before, emissions are decreasing over time. The heat from waste incineration represents a third of the district heating in the region and approximately 5 per cent of the electricity demand in Gothenburg. In addition, 60 per cent of electricity produced comes from biogas.

*Statistics in the figures refer to Sävenäs waste treatment facility.

Cleaner air with smart heating and cooling

In order to supply Gothenburg with heat, we have a far-reaching district heating system used to distribute energy from different heat sources. The district heating network in Gothenburg measures about 1,230 km in length. It heats 90 per cent of the apartment buildings in Gothenburg, some 12,000 houses and countless factories, offices, shops and other public buildings. The district heating system enables us to utilise a large amount of energy that would otherwise dissipate into the atmosphere or the sea. Some 70 per cent of our district heating comprises heat recovered from other activities, such as waste incineration and industrial processes. In recent years, a district cooling network has also been developed for offices, hospitals, factories and other buildings. The technology is simple, quiet and resource efficient, with the cooling coming from recovered energy and the cold water of the river Göta Älv in Gothenburg.

<table>
<thead>
<tr>
<th>Year</th>
<th>CO2 emissions (kilotonnes/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1989</td>
<td>73%</td>
</tr>
<tr>
<td>1993</td>
<td>60%</td>
</tr>
<tr>
<td>2000</td>
<td>55%</td>
</tr>
<tr>
<td>2010</td>
<td>50%</td>
</tr>
<tr>
<td>2015</td>
<td>45%</td>
</tr>
</tbody>
</table>

**Source:** Environment Administration, City of Gothenburg

**GÖTEBORG’S DISTRICT HEATING SYSTEM 2018**

- **Recovered energy** 15%  
  - Cogeneration 23%  
  - Industrial surplus heat 32%  
  - Waste water 8%  
  - Flue gas condensation 10%  
- **Renewable energy** 15%  
  - Cogeneration (bio mass) 3%  
  - Boiler (bio mass) 5%  
  - Purchased heat (bio mass) 3%  
  - Electricity to waste water heat 3%  
  - Auxiliary electricity (pumps etc.) 1%  
- **Fossil** 12%  
  - Cogeneration [natural gas] 12%  
  - Boiler [natural gas, oil] 0%  

**Source:** Göteborg Energi

**SUPPLIED ENERGY INCLUDING PRODUCTION METHOD FOR GÖTEBORG’S DISTRICT HEATING SYSTEM 2018**

- **Recycled energy** 73%  
  - Cogeneration 23%  
  - Industrial surplus heat 32%  
  - Waste water 8%  
  - Flue gas condensation 10%  
- **Renewable energy** 15%  
  - Cogeneration (bio mass) 3%  
  - Boiler (bio mass) 5%  
  - Purchased heat (bio mass) 3%  
  - Electricity to waste water heat 3%  
  - Auxiliary electricity (pumps etc.) 1%  
- **Fossil** 12%  
  - Cogeneration [natural gas] 12%  
  - Boiler [natural gas, oil] 0%  

**Source:** Göteborg Energi

**IN THE GOTHENBURG REGION, 2000–2016 (INDEX 2000 = 100)**

- **Industrial emissions** 2000 = 100

**Source:** Statistics Sweden and Swedish National Emissions Inventory

**DISTRIBUTION OF GREEN BONDS IN GOTHENBURG, MSEK**

<table>
<thead>
<tr>
<th>Project</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electric vehicles</td>
<td>30</td>
<td>19</td>
<td>11</td>
<td>19</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Pedestrian city</td>
<td>50</td>
<td>10</td>
<td>17</td>
<td>32</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cycling city</td>
<td>60</td>
<td>28</td>
<td>28</td>
<td>65</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustainable construction</td>
<td>382</td>
<td>314</td>
<td>498</td>
<td>588</td>
<td>707</td>
<td></td>
</tr>
<tr>
<td>Energy efficient housing</td>
<td>388</td>
<td>427</td>
<td>544</td>
<td>830</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trams</td>
<td>170</td>
<td>91</td>
<td>41</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solar farm</td>
<td>38</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual total</td>
<td>480</td>
<td>881</td>
<td>1,609</td>
<td>1,344</td>
<td>1,397</td>
<td>1,181</td>
</tr>
<tr>
<td>Total allocated</td>
<td>480</td>
<td>1,361</td>
<td>2,970</td>
<td>4,314</td>
<td>5,711</td>
<td>6,892</td>
</tr>
</tbody>
</table>
More travel fuelled by renewables

More and more people are using public transport. In 2018, some 287 million trips were made in the Gothenburg region, an increase of 5 per cent over the previous year. Parallel to this, an increasing share of vehicle usage runs on renewable fuels. In 2007, about one third of public transport in the Gothenburg region was powered by renewable fuels. By 2018, this figure had exceeded 96 per cent. Biodiesel, electricity and biogas have contributed the most to phasing out non-renewable fuels in the region’s public transport. Recently, however, tall oil and animal waste (HVO) have replaced biodiesel. Today, HVO is the largest source of fuel for public transport in the Gothenburg region.

Source: Västtrafik

Did you know...

Quiet & emission free transport
Following several successful years of electric buses on route 55 in Gothenburg, Electricity has expanded with two electric buses operating on route 16. At the same time, work is continuing to strengthen Gothenburg’s position as a leader in electric mobility.

Source: AB Volvo

Solevi ...
... opened in Gothenburg in 2018 and became Sweden’s largest solar farm. It generates 5.5 MW which is enough energy to meet the needs of 1,100 houses.

Source: Göteborg Energi

Fed up!
The Fossil-free Energy Districts project, FED, aims to decrease the use of energy and the dependence on fossil fuel in buildings. The FED system is a digital marketplace that uniquely connects the three energy carriers – electricity, heating and cooling – at Chalmers’ Campus Johanneberg. The buildings that are part of the system consume, produce and store energy via, among other things, solar cells, thermal inertia and batteries.

Source: Johanneberg Science Park

2020

will see Landvetter Airport’s carbon dioxide emissions reach zero. The airport is already taking strict measures to reduce its environmental impact and carbon dioxide emissions have sunk drastically. The airport is certified to the highest level according to an international standard for its work to reduce emissions.

Source: Swedavia

90% of all apartment buildings in Gothenburg have district heating
Gothenburg is a world leader in district heating. District heating contributes to better air while making it possible to use heat that would otherwise be lost.

Source: Göteborg Energi

1% of heating in Gothenburg is powered by oil.

Source: Göteborg Energi

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Economic Outlook
Published quarterly, Economic Outlook provides a summarised view of the economic situation in Gothenburg in comparison to other Swedish metropolitan regions. The report presents many up-to-date performance indicators for trade and industry, including those linked to the labour market.

Invest in Gothenburg
This publication presents the Gothenburg region’s key industries, investment opportunities and assets for doing business.

Come join us
This brochure provides information on what it’s like to live, work and study in the Gothenburg region.

Retail Guide
Retail Guide is an annual publication that presents retail opportunities in Sweden and the Gothenburg region, and provides facts and information about the market, demand and supply.
