INFRASTRUCTURE AND CONSTRUCTION IN SWEDEN

SECTOR OVERVIEW

Business opportunities for global infrastructure companies
INVESTING FOR A STRONG AND SUSTAINABLE INFRASTRUCTURE

Proposed investments within construction and infrastructure have created business opportunities for global infrastructure companies in Sweden. Being the largest market in Scandinavia, Sweden is the ideal location for centralised market operations in Northern Europe.

BUSINESS OPPORTUNITIES
Sweden has a strong and sustainable transport system. A transport system that facilitates the working life for citizens and makes it easier for companies to deliver. The ambition is to continue to have an infrastructure that meets future demands of the economy. Therefore the Swedish government has allocated SEK 623 billion between 2014-2025 for infrastructure projects to be allocated towards the operation, maintenance and reinvestment in state railways.

In addition to the above allocation there are projects on a regional and local level. Estimated additional investment level is around SEK 700 billion during the same period.

THE MAIN DRIVERS
Traffic in Sweden has increased over time, especially in metropolitan areas and along major routes through the country. This has led to congestion, disruption and vulnerabilities in the transport system.

Trade and exports are important and substantial parts of the economy. Sweden must therefore have a transport system that provides companies with efficient facilities to run and develop their businesses. Everyone must be able to rely on arrival times, whether it is the individual commuter or a company delivering or receiving its goods.

A COMPETITIVE BUSINESS PLATFORM
The Swedish business climate and growth prospects earn high rankings in most internationally recognised studies and surveys. Sweden ranks as the second most business-friendly country, the third best country in which to locate a corporation’s headquarters, second in terms of quality of life and first in the green living category. Overall, Sweden tops Europe in competitiveness, leading in innovation, business environment and talent.

Sweden offers good language skills, low employee turnover and high computer literacy, all contributing to a competitive business platform. The high quality of available staff, coupled with the high quality of life offered, makes Sweden a global magnet as a location.
OPPORTUNITIES FOR COLLABORATION
Swedish companies within the field of construction and infrastructure are very competent using innovative new technologies and methods. There is a continuous effort to find ways of building for extreme climates and conditions. Quality and life of the projects are of overriding interest. Swedish companies work closely with research institutes to develop new materials for their products. This means that there is a tremendous potential for foreign companies within the construction and infrastructure sector to collaborate with global leaders to improve their own offering. Foreign companies can also participate in on-going R&D projects at Swedish research institutes, developing building techniques and environmental and sustainable ways of building.
Some projects on a national level are Bypass Stockholm, Western Link, East Link and the new residential areas in Vårtan, Stockholm, and the ports in Stockholm, Gothenburg and Malmö.

PROCUREMENTS, TENDERS, BIDDINGS
On a national level the Swedish Transport Administration is responsible for budgets, procurements and biddings. Quality, sustainability and environmental issues are important for all projects. This is conducted using a very thorough procurement process. Sweden does not offer PPP projects (Private-Public Partnerships) on a national level. However PPP solutions can be offered on a regional and local level.

THE MARKET
The overall goal of the Swedish transport policy is to ensure financial efficiency and sustainable transport for citizens and businesses throughout the country. Sweden needs the capacity to fulfil these ambitious goals during 2014-2025. The Swedish infrastructure and construction market is today dominated by a few companies that are running many different projects in all sectors of construction. The big investments into the Swedish infrastructure market mean that there is a room for international construction companies that want to take part in future infrastructure projects.

DID YOU KNOW THAT...
- Sweden implements the largest investment in infrastructure expansion ever
- Sweden builds tracks for high-speed rail

The Largest Construction Companies in Sweden

<table>
<thead>
<tr>
<th>Company</th>
<th>Share</th>
</tr>
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<tbody>
<tr>
<td>Peab</td>
<td>23%</td>
</tr>
<tr>
<td>Skanska</td>
<td>22%</td>
</tr>
<tr>
<td>NCC</td>
<td>17%</td>
</tr>
<tr>
<td>JM</td>
<td>7%</td>
</tr>
<tr>
<td>SVEIA</td>
<td>4%</td>
</tr>
<tr>
<td>Intrarod</td>
<td>3%</td>
</tr>
<tr>
<td>Veidekke</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>20%</td>
</tr>
</tbody>
</table>

Examples of major projects in Sweden

- Bypass Stockholm
- Western Link
- East Link
- New residential areas in Vårtan, Stockholm
- Ports in Stockholm, Gothenburg and Malmö
- ERTMS throughout Sweden
- Stockholm Bypass
- Eastern Link
- Flackarp-Arlöv
OUR SERVICES
WE HELP YOU EXPAND YOUR BUSINESS IN SWEDEN

Business Sweden is the official Swedish trade and invest council. We facilitate foreign investment in Sweden and make it easier for Swedish companies to grow internationally.

Business Sweden supports international companies to connect with investment opportunities in Sweden – whether the interest is to gain access to the market or world-class R&D competence and innovation. We provide you with the information, guidance, solutions and network required to invest in Sweden.

EXPERIENCED STAFF
Business Sweden’s industry specialists facilitate for international companies in the process of establishing in Sweden and finding partners for collaboration or investment. Our strength lies in an experienced team of international trade and investment professionals in sectors where Sweden enjoys competitive advantages such as environmental technologies, ICT, life sciences, material technologies and transportation systems. A network of regional partners across Sweden ensures local support.

STEPS TO SUCCESS
Business Sweden has a simple process for supporting your future business with Sweden and our offer is based on your company’s specific needs. Our working process consists of a number of steps, including the following services:

▸ Information sharing. Based on your investment needs, we share insights on Swedish business sectors, the Swedish market, the investment climate, R&D, specific competence clusters and investment costs.

▸ Network access. We introduce you to all necessary public and private service providers, authorities and organisations.

▸ Investment opportunity search. Based on your priorities we scan, identify and present business opportunities in Sweden. We give you advice on key industry stakeholders and help you identify your next investment step.

▸ Matchmaking support. We introduce you to various opportunities of strategic partnerships, investments and other types of cooperation.

▸ Establishment information. We provide you with information on how to set up and run a business in Sweden including rules and regulations, legal entities, employment, taxes and more.

▸ Location management. Based on your requirements, we support you in identifying sites for your operations in Sweden.

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