



NORTH DENMARK REGION

The North Denmark of Opportunities

Strategy for Regional Growth and Development



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THE FUTURE OF NORTH DENMARK STARTS HERE

”The entrepreneurial drive and potential of North Denmark is to be brought in play enabling us all to solve the future challenges faced by our region in a common effort. That is why we call it the Strategy for Growth and Development for the Entire North Denmark.”

More than eight years have passed now since the North Denmark Region became reality. This took place back in 2007, just before the financial recession hit us all and challenges started heaping up here and in the entire country. Since then a lot has happened to our region, and in spite of recession and adverse events we have positioned ourselves on the leading edge in several fields. To a wide extent, this is owing to our confidence in being able to do something good for our region if we put in a joint effort. So continuing to strengthen our collaboration is of the utmost importance since this will be the way to go for a positive development in North Denmark.

An important foundation for the future development of North Denmark is the Regional Strategy for Growth and Development. This is about the future of us all in this region and what we want North Denmark to be like in 2020.

The Strategy sets out the course to be followed by the Regional Council in collaboration with the Growth Forum, the municipalities and other partners in pursuit of the future goal to create a strong North Denmark characterised by dynamic vigour, development and growth. A North Denmark that will prove attractive to both industry, citizens and visitors. And not least, a North Denmark known for its social cohesion and collaboration.

The entrepreneurial vigour and potential of North Denmark must be brought in play across the region, municipalities, industries and organisations, enabling us to address the challenges faced by our region today and in the future. That is why we call it the Strategy for Growth and Development for Us All In North Denmark.

It is our hope in the Regional Council that this strategy will inspire and encourage you to make your contribution to a strong North Denmark.

Happy reading!



Ulla Astman

Chairman of the Regional Council

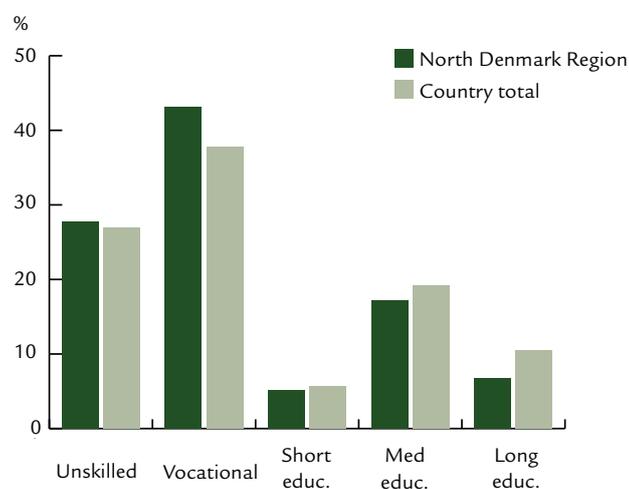
TODAY'S NORTH DENMARK

Over the recent 8 years, North Denmark has gone through a positive development in quite a diversity of fields. In spite of adverse conditions, the region has managed to move from the lower end of statistics to the leading edge. This development, however, did not come about by itself. Through focused efforts, innovation and strong collaborations, North Denmark has made quite a headway when it comes to industrial innovation, technological development, the development of skills and knowledge as well as employment.

Education and Skills

Never before have so many citizens of North Denmark completed an upper secondary education, a higher education or upgraded their skills and qualifications. In times where Denmark is unable to compete on product pricing, human resources become the primary raw material of North Denmark. While History witnessed our region with more unskilled labour and fewer highly educated citizens compared to the nation as a whole, recent years have seen a significant development with North Denmark closing up on the average figures of the nation.

The highest completed education by the population (aged 25-64) in 2014



This also contributes to the enabling of enterprises in North Denmark to boost their future capacity of innovation. Over the recent years, enterprises of North Denmark have proved great drive and capacity of innovation – to rethink and create new processes and new products.

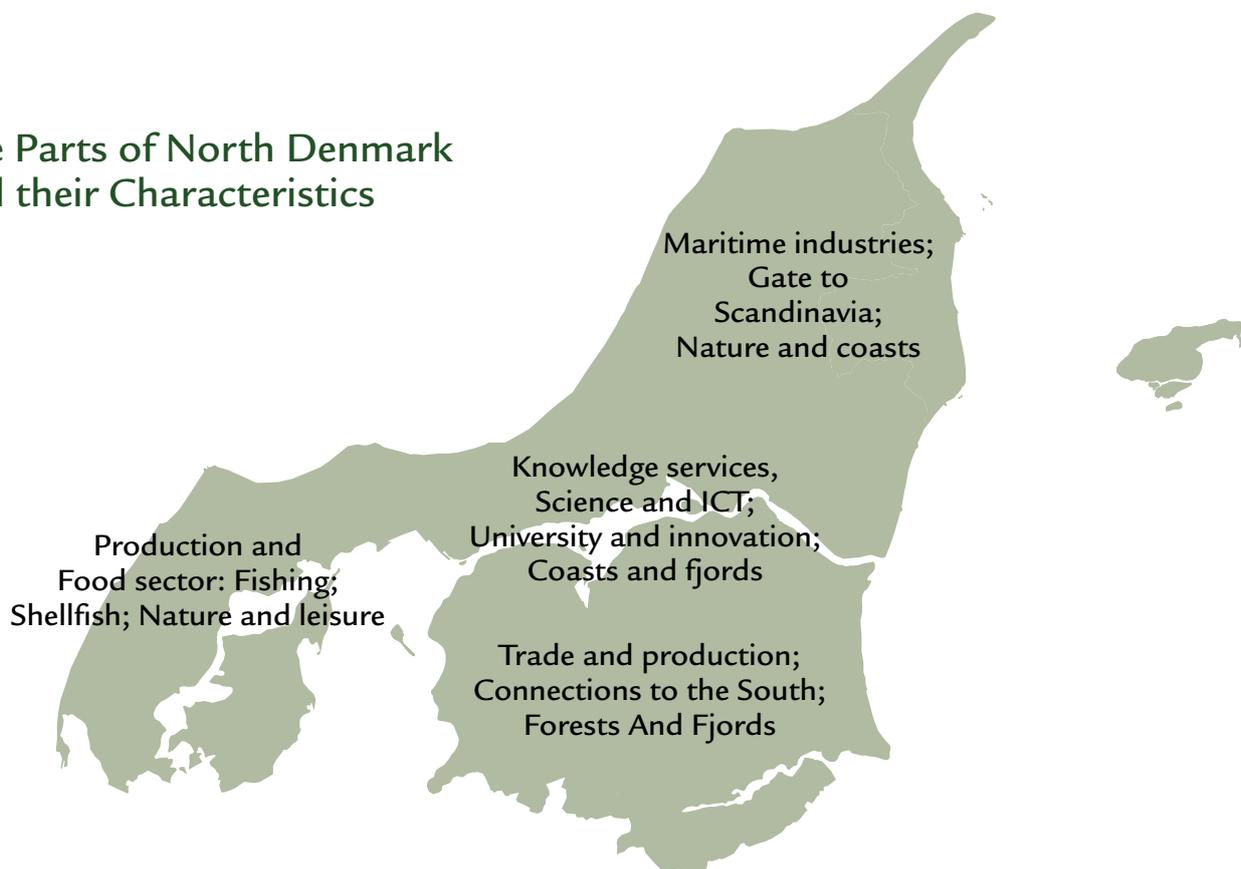
Industry and innovation

Innovation is of great importance to the renewal of industrial technology, processes and organisation. For example, the employment of new technology means that a number of manual tasks can be automated and digitized via the deployment of machinery, robots and computers. This renders each employee more efficient, thereby increasing production and revenues. North Danish enterprises have achieved a significant boost in innovative capacity over the recent years. This is not least owing to enterprises benefitting from the strong institutions of education and knowledge found in the Region, which are not only educating a qualified workforce but also spearheading innovation and technical development. This means that the region holds strong qualifications within eg. mobile and wireless communication, energy and climate as well as health and life science technology.

Employment and unemployment

Over the last 4 years, North Denmark has seen a continuous decrease in unemployment, and unemployment is on the decline in practically all parts of the Region. It is quite significant that North Danish unemployment percentages are now at the same level as those of the country as a whole while for decades it has seemed like a law of nature that North Denmark

The Parts of North Denmark and their Characteristics



would have the highest unemployment in the country. After many years of recession with declining employment, the trend has now turned, and forecasts are indicating that the trend of employment is on the increase for the years to come. This turn will appear at first in the area of Aalborg while the curve will bend a somewhat later in other parts of the Region.

A Strong North Danish Identity

This positive development takes place within the physical framework of a region with both urban and rural parts, open countryside and modern cit-ies. A combination that may pose challenges, but definitely has great potential for growth and development.

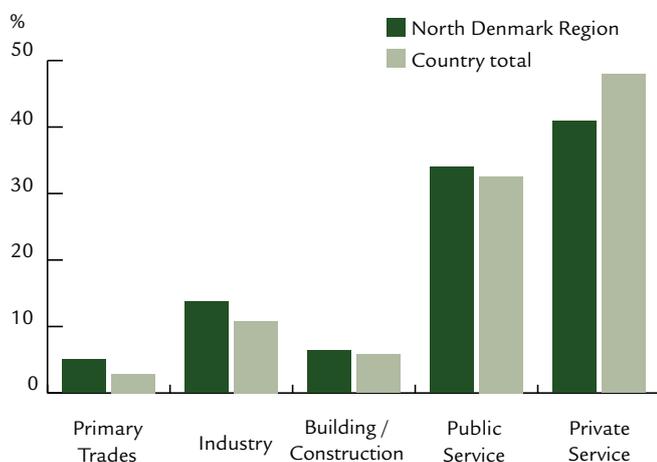
The North Denmark Region counts 11 municipalities and almost 600,000 citizens. From Thisted in the West to Læsø in the East, the Region is approx. 140 km wide and from Hobro in the South to Skagen in the North, the span is approx. 130 km. The North Denmark region has sea and firths as its natural borders with strong connections out of the Region. This leaves a sound basis for maintaining and developing a strong North Danish identity as the basis for keeping up the role of the region as a player in Denmark, in Scandinavia, in Europe, and on a global level.

North Denmark is composed of different regional parts with each their individual identities ad characteristics. Aalborg as a university town plays a special role and to a wide extent it plays the role of the centre for the Region (an urban regional function).

Focus on the symbiosis between Aalborg and a network of attractive and viable towns in the various parts of North Denmark are therefore crucial in the accomplishing of vision and goals in a North Denmark of Opportunity.

Each of the other North Danish parts are holding various positions of strength and good options of education, supplementing each other in a specialised pattern. Also a number of municipalities are making themselves attractive for residence and tourism, utilising their unique opportunities and potentials tied to specific locations like nature and culture. These differences and potentials are what we need to develop even further, creating stronger social cohesion, mobility and growth across all parts of the Region.

Industrial structure of Region North Denmark



A STRONG COLLABORATION FOR NORTH DENMARK

North Denmark has a great potential to do well in national and international competition. However, it requires a focused collaboration between several players across the region.

North Denmark has a strong and innovative industrial and educational environment and a sound framework for the citizens to live a good daily life. Still, there is a need for a focused collaboration to enhance the region, since development and growth do not generate by themselves. Consequently, as of January 1st, 2015, the municipalities and the Region of North Denmark have established a close and committing collaboration on a common agenda for growth: Business Region North Denmark. Through this collaboration we can create a stronger North Denmark generating its own growth.

Conditions and Global Challenges

A large variety of global challenges are setting their mark on the development of North Denmark and the geographic position of North Denmark is an influential factor as well in the options and potentials of development:

Globalisation means fiercer competition while creating new openings for export to enterprises in North Denmark. In the overall view, globalisation is an advantage to North Denmark but it requires a presence of resources and proper qualifications to make the most of such opportunities.

Climate change is now moving faster than ever and there is a continued need for switching to sustainable sources of energy in order to reduce CO₂ emissions.

All the while, we must take in account the impacts derived from climate change such as raised sea levels and extreme weather conditions.

The demographic development means that there will be more seniors and less young citizens in North Denmark.

This is owing to an increased life expectancy and a declining rate of birth. However, this trend is enhanced by the great number of young people leaving the region, meaning fewer people to meet the requirement of the enterprises for a workforce.

Urbanisation is also a global trend meaning that settlement and growth will concentrate in the major cities while many

rural areas will depopulate. The position of North Denmark on the tip of Jutland, surrounded by sea, means that some areas are in lack access to hinterlands for labour markets in all directions. Such challenges will get even stronger in areas with no direct access to the motorway and railroad grid.

Qualities and Potentials of Growth tied to place-based qualities

We must make North Denmark stronger by strategic collaboration and focus on the special qualities and potentials for growth tied to specific locations that are to be found in the Region.

Among the major qualities and potentials for growth in North Denmark, tied to place-based qualities we count:

The Cities: The cities of North Denmark are the powerhouses of culture, innovation and urban life. The cities hold a variety of strengths within settling, industry, nature and culture and consequently they should invest in different developing strategies based on the strength of each town. A positive development requires close relations and collaborations across the Region. We are each others' symbiotic prerequisite and we are all dependent on having a network of attractive and viable cities and hinterlands.

The Urban Region: North Denmark takes part in a national and international interaction of cities/regions. The university



town of Aalborg is a dynamo for the region similar to the role of Copenhagen to Denmark and as major cities in the municipalities are to their neighbouring areas.. With 1/3 of the region's citizens and a substantial part of North Danish industrial life concentrated in and around Aalborg, the town is a catalyst in the business development of the region. A positive development in North Denmark is heavily depending on close relations and collaborations between the industrial sector, the industrial institutions and authorities of Aalborg along with all the municipalities of the region.

Attractive North Denmark: North Denmark excels in several fields - also in an international context. This goes for several of the tourist attractions of North Denmark, the fantastic coast, the experience of nature and cultural gems, each of which are contributing to lifting the entire region.

Blue North Denmark: We are close to the North Sea, the Kattegat and Limfjord. This gives the maritime industries a special position of strength and makes up important routes for the transport of goods and people. Also the proximity of water is a great attractive asset for settling, recreation and tourism.

Green North Denmark: Nature and landscape make a good basis for experience and recreational activities. The green North Denmark also offers good possibilities for agriculture, food production and the use of green technology.

Education: Aalborg University with its many international positions of strength is vital to the development of North Denmark. With UCN, MARTEC and a network of institutions for vocational and medium further educations, the university contributes to the supply of a well educated workforce to the industrial sector.

The Business Sector: North Denmark has a sturdy industrial sector with special positions of strength within the fields of sustainable energy, ICT, maritime industries, food sector, experience industry, building industry, and logistics. The collaboration of the industrial sector and Aalborg University is of great importance to the innovative drive of enterprises.

Smart mobility: If the potentials of growth are to be used to the full, it is important to facilitate the mobility of people, goods, knowledge and data in the Region. So this calls for a collaboration to enhance the physical as well as digital connections in North Denmark.

A Strong Collaboration for North Denmark” has been created as a joint venture between the municipalities of North Denmark and the North Denmark Region. So this section is also to be found in all municipal planning strategies in North Denmark

VISION FOR THE GROWTH AND DEVELOPMENT OF NORTH DENMARK

By 2020, North Denmark will be recognized for its unique capability of driving sustainable growth, cohesion and balance across the entire region and having strongly exploited the potentials of globalisation and the regional positions of strength.

North Denmark will achieve these goals through an international outlook, openness and collaboration to prove its intent to explore new paths and try out innovative ideas and solutions to the benefit of the citizens and enterprises of the region.

Fields of Effort

The driving engine in the Regional Strategy for Growth and Development consists of three fields of effort to address the special challenges and potentials of North Denmark. Initiatives in these three fields will help to make the vision for the growth and development of North Denmark come true. This applies to initiatives from both the Regional Council and the Growth Forum, and not least to initiatives developed and launched in close cooperation between relevant players in North Denmark.

The three fields of effort are:

- A Coherent North Denmark
- A North Denmark in Growth
- An Attractive North Denmark

Founding Principles

The vision builds on a number of principles describing how the Regional Council and Growth Forum will transform words to reality.

The founding principles are:

- Sustainable Growth
- Cohesion and Balance
- The Potentials of Globalisation
- Openness and Collaboration
- Innovative Thinking



Sustainable Growth

Growth is the prerequisite of the development of the region. Growth, however, should create permanent results, and the efforts should be launched on a financially and environmentally sustainable foundation based on evidence. All the while, the efforts should be socially sustainable, creating equal opportunities for everyone in all parts of the region.

Cohesion and Balance

North Denmark must make the most of its opportunities and potentials in all parts of the region. In particular, the potentials tied to place-based qualities in the peripheral areas should be put to use and contribute to the development of active and enterprising local communities. North Denmark should also be unified by a strong mobility and an enhanced digital infrastructure.

The potentials of globalisation

Globalisation is an opportunity for growth across the entire region. So North Denmark should make the most of international competition and the new export markets. We should open up towards the global community with an international outlook to get inspired and establish new collaborations.

Openness and Collaboration

North Denmark has a long and strong tradition for collaboration to be used for expansion. We must establish strong strategic collaborations and partnerships for our efforts to obtain the greatest effect and results possible.

Innovative Thinking

We must dare taking on new mindsets and being innovative in all fields. Innovation provides better solutions and in the industrial sector, innovation can contribute to a decrease in production costs, increased productivity and an increased creation of value.

FIELD OF EFFORT:

A COHERENT NORTH DENMARK

The goal is to create mobility, growth and coherence across the entire North Denmark. This requires strong lines of transport and communication within and out of the region. This goes for the transportation infrastructure with roads, railways and airports as the backbone of public transport, for the enterprises' need for goods transport and for private traffic within and through North Denmark. This also applies to the digital infrastructure, which is a prerequisite for both settlement and the locating of enterprises.

A good infrastructure is a prerequisite for growth

A good infrastructure of roads for moving people and goods is a must for mobility and hence for growth and employment. The motorway crossing of the Limfjorden at Aalborg is a bottleneck to mobility and calls for a third Limfjord crossing to be constructed as soon as possible. Likewise there is a need for major road axes across the region to tie the parts closer together and create east-westerly feeding arteries to and from the motorway. As for the railway grid, it has been decided to electrify the railway connection to Frederikshavn and to enhance the regional coverage by train.



The seaports are extremely vital elements in the infrastructure of North Denmark: The large amounts of goods, fish and passengers transiting through the ports of North Denmark make the base for growth and employment. The five largest ports of North Denmark are all in the process of expansion to create even more activities in the lines of eg. offshore, maritime services, energy and tourism. Aalborg Airport also plays a vital role in linking up North Denmark to the rest of the world.

Adding to this the digital infrastructure plays an important role as well. Access to proper broadband connections and a well deployed wireless IT infrastructure play an important role to both settling and industrial development – not least in the rural districts of the region.

Public transport contributes to linking the region together

In a coherent North Denmark, public transportation is an important element in the support of commuting between places of residence, work and education. Likewise, public transport is vital in securing an adequate mobility outside the urban areas to maintain the option of rural residence.

However, North Denmark is facing a series of challenges in this field. The increase of operational costs and the decrease of revenues from passengers puts routes with low numbers of passengers, typically the routes to outskirts of the region,





DID YOU KNOW...?

- 68% of the population in North Denmark has access to 100 Mbit broadband.
- More than 300.000 lorries are passing through the ferry ports of North Denmark on an annual basis.
- 32 Mill. passengers per year are travelling by public transport in North Denmark.
- In 2013, 8 Mill. passengers used the regional bus routes in North Denmark.
- Every day 105.000 vehicles are crossing the Limfjord in Aalborg.

under pressure. There will also be a need to rethink solutions to the traffic operation.

Adding to this, climate change and environmental considerations are posing demands of developing new and more sustainable fuels and considerations as to when physical transportation is actually required.

In parallel to this, the citizens of North Denmark must realise that public transport is a genuine alternative to private motoring. This understanding will be supported, eg. when North Denmark will take ownership of the operation of regional trains meaning more departures and better timing for the switching between trains and buses. Also a light rail will be established in Aalborg with connection to the new University Hospital. Rapid and comfortable buses (X-Bus) are offering public transportation between major cities and in the less populated areas, local routes and flex systems are to ensure the mobility of the citizens. Adding to this are the options of enhancing and facilitating the use of bicycles as an environmental means of transport.

New Technology Offers Better Solutions

There is a global trend of growth in the transportation of people as well as goods. This causes a need for solutions

to ensure a sound operation of traffic, intelligent logistics, information on the journey and more sustainable transportation. North Denmark has got both enterprises and research environments working on new solutions in this field, and North Denmark has a long standing reputation for its strong qualifications in ITS (Intelligent Transportation Systems and Intelligent Logistics). ITS solutions at their present stage can be regarded as the first step towards an integrated (Smart Region) utilisation, the goal being for North Denmark to mark itself as the Danish ITS Region where new technologies are developed and tested prior to implementation across the country.

The capacity of transportation infrastructures is traditionally improved by the construction of new facilities and expansion. A Smart Region will attempt to optimize the utilisation of available capacity using ITS. This goes for using ITS to boost the present utilisation of capacity as well as obtaining an optimised balance between supply and demand by using ITS and information systems to eliminate the load of traffic on roads suffering from bottleneck issues during peak hours.



INITIATIVES

The Regional Council goes for a wide collaboration on a line of initiatives to facilitate a coherent North Denmark. The following items are of high priority while more may be added over the next four years:

- The establishing of a third Limfjord Crossing to the west across Egholm financed by the State.
- Improving the railway grid from Aarhus to Frederikshavn.
- Improving the road connections between Hanstholm-Skive-Herning as feeding connections to the motorway grid.
- Improving the road connections between Thisted-Aalborg and the Aggersund bridge.
- Reinforcing cohesion and mobility by deploying a sound digital infrastructure – cabled and wireless.
- Supporting the development of North Danish ports and logistic qualifications.
- Supporting the Jutland Corridor including the establishing of a Haervej motorway through the middle of Jutland and supporting a Kattegat fixed link.
- Maintaining and developing Aalborg Airport as a key airport for national and international traffic.
- Enhancing the routing of Public Transportation for the benefit of commuters and a coherent region.
- Optimising the expanded regional railway traffic as well as trains going in and out of North Denmark.
- Working to minimize the footprint of transportation on environment and energy consumption.
- Deployment of Intelligent Transport Systems (ITS) and Smart Region solutions to address bottlenecks.

FIELD OF EFFORT:

A NORTH DENMARK IN GROWTH

The goal is to stimulate new growth in North Denmark in fields where the region has special potentials and where a drive and will for growth can be found. An innovative and strongly qualified industrial sector is the best guarantee for the creation of jobs and sustainable growth in North Denmark. North Denmark can offer optimal conditions for established as well as new enterprises including a culture of education and a workforce matching future requirements. It is important to stimulate and exploit the industrial drive for growth and the development must be sustainable and a contributor in creating cohesion and balance in the region.

Building on the Strong Industrial Branches of the region

North Denmark has a range of industrial branches with particularly strong potentials for growth. These are branches that have specialised in the course of History creating unique positions compared to other industrial sectors. This goes for the fields of foodstuff, tourism, maritime industries, energy, and health as well as information and communication technology. Together these industrial sectors make up 35%

of employment and 40% of the economy within the private sector of North Denmark.

A sound foundation has been created to develop their potentials further since the enterprises and centres of knowledge are already organised in well functioning clusters initiating focused courses of development for the enterprises. The cluster organisations are focusing on eg knowledge sharing, qualifications and skills, globalisation, innovation, collaboration and market development. A strong and professional organisation and development of the clusters is vital to a continued support of the growth of the industrial sectors.

Supporting Enterprises with a Drive for Growth

It is important to "A North Denmark in Growth" that the goal is not just to solely stimulate the industrial sectors mentioned above where the region holds a strong historical position. The industrial sector of North Denmark is facing a variety of challenges across industries, like productivity and a lack of a qualified workforce, that must be addressed, while individual enterprises across industrial fields and sectors demonstrating a drive and potential for growth should be supported. Therefore, the facilitating effort towards industries should be organised such that it is based on the companies' drive for growth while stimulating this drive and capacity of growth.





DID YOU KNOW...?

- Productivity in North Danish enterprises is 91% of the national average.
- By 2020, enterprises in North Denmark will be in need of approximately 2.000 skilled workers.
- Today only 9% of young people in North Denmark with a need for an internship are missing an internship. This is the best result on a national scale.
- No less than 93% of a North Danish juvenile cohort are expected to complete a secondary education as a minimum.
- 29% of all North Danes in the age bracket of 25-64 years have completed a further education.

Historically high growth has been a challenge. Too few entrepreneurs become entrepreneurs of growth and too few established enterprises enter a sound course of growth. Entrepreneurs and enterprises of growth often find themselves in quite different scenarios, so the approach to support them will often be of a varying nature. So the facilitating effort towards industries should be organised in accordance with this, however, with the same object of making more enterprises achieve a clear course of high growth.

Securing an Adequately Qualified Work Force

Forecasts are indicating that North Danish citizens will be better educated in the future, but there is still a need to launch more initiatives and activities. The challenge is that almost one third of the North Danish workforce is unskilled with a decreasing demand for unskilled workers and this trend of decrease will continue in the future. In parallel to this, analyses are generally indicating a growing need for highly educated and specialised people in a number of defined fields.

If enterprises of North Denmark are to exploit their potential of growth to the full, a general boost to the level of skills and qualifications is called for to ensure a workforce that will match the requirements of the enterprises. This can be

achieved by making a larger number of young people complete a vocational education, by embarking more unskilled people on qualifying courses and making a larger number of enterprises employ highly educated persons.

Adding to this, we must focus on a general expansion of the workforce, for example by increasing the age of retirement and by attracting a qualified workforce from abroad.





INITIATIVES

The Regional Council goes for a wide collaboration on a line of initiatives to facilitate a North Denmark in growth. The following items are of high priority while more may be added over the next four years:

- Further development of cluster organisations in special industrial sectors with the object of professionalising and streamlining these to support the growth of the industrial sectors as efficiently as possible.
- Development of the capacity and drive to high growth offering targeted framework programmes for entrepreneurs of growth and other enterprises with a drive for growth.
- Supporting productivity by facilitating the collaboration of enterprises with knowledge environments and educational institutions for the acquisition of new qualifications.
- Development of innovative ways of tendering through a collaboration between public and private sectors to encourage enterprises to collaborate on eg. the building of hospitals and the supply of technology to the health sector.
- Contributing to the re-education of unskilled workers into skilled workers through short term and targeted courses in areas with an imminent lack of an adequate workforce.
- Enhancing the enrollment on vocational secondary educations and launching initiatives to minimise dropouts in these lines of education.
- Expanding the workforce by eg. attracting a qualified foreign workforce and encouraging those in jobs to stay longer in the labour market.

FIELD OF EFFORT:

AN ATTRACTIVE NORTH DENMARK

The goal is to enhance the position of North Denmark as an attractive region to citizens, visitors and industry. North Danish residents want to live in attractive areas with an abundant nature a clean environment, and a good cultural life. The same qualities are attracting tourists and we must make the most of this potential. North Denmark is to be an attractive, green and clean region. We are collaborating on a wide scale to solve the accelerating climate changes and to utilize the potentials of new energy sources and systems.

Abundant Nature and an Active Cultural Life

North Denmark is rich in nature, has a clean environment and an active cultural life, which all play an important role in both attracting and retaining citizens as well as making tourists choose North Denmark. The quality and variety of North Danish nature also contributes to the foundation for the production of foodstuff and energy, quality of life and recreation. North Denmark has so much to offer, however, we must focus on enhancing the quality and the facilitation and access to North Danish nature and culture.

An active and diversified cultural life with high quality offerings and events is also important to the development



of local communities and the placement of enterprises. So a certain measure of geographical balance in cultural events is vital. Adding to this, culture makes up an independent industry in growth characterised by many small institutions and individual persons.

Place-based Qualities Must Be Better Utilised

Attractiveness and potential of development often go along closely though often with strong ties to local strengths and conditions. Industrial opportunities can often be found in local resources tied to specific locations in cities as well as in rural areas. The special qualities of different places and resources must be further activated to create local jobs and activities. This goes for urban environments, ports and landscapes but also for local identity and the residents and users of the location. A focus on the qualities of locations can help in strengthening the ties between nature, culture, tourism and industrial development and creating new opportunities for a locally driven innovation and entrepreneurship.

Tourism and Experience Economy Must be Developed

Tourism is an important industry in North Denmark, in particular in the peripheral areas. With around 4% of all jobs in North Denmark and 3% of the value produced within all private industries, tourism is of greater importance in North Denmark than in any other region. The qualities of North







Denmark are to a great extent found in coastal tourism, but the continuum of attractions in the region spans from outdoors experiences, recreative bike routes and music festivals to towns with experiences or rural areas offering peace and quiet.

While tourism across Europe on the whole has been increasing, Denmark and North Denmark have seen a stagnation in tourism from abroad over the recent years. This development can be owing to many factors but high prices compared to quality in tourism products can be a contributing factor. A stronger focus on quality and selected target groups can be elements with a positive impact on the attraction of foreign tourists. This must happen using more focus on business development and by developing the qualifications and service concepts of the enterprises. So urban tourism and the industrial tourism are important to tourism as a whole in North Denmark.

Attractiveness Is Also About Environment and Energy

When it comes to a clean environment both the state and the region as well as the municipalities have an important

mission in the tracking and mapping of locations in the region under suspicion of pollution. The object is to make sure that citizens, environment and drinking water will not be exposed to unhealthy conditions. So the object of securing a clean environment vital to citizens, visitors and enterprises.

North Denmark has a great potential to generate even more growth in the energy sector, which is already the second largest exporting industry. For North Denmark the export of energy technology rose by almost 40% from 2007 to 2011 to a total of DKK 11.7 Billion. Enterprises and institutions of knowledge hold a high amount of knowledge in the fields of wind energy, hydrogen/ and fuel cells, biomass, wave energy, energy optimising and sustainable construction and building. Adding to this, there are great potentials in the changeover to green energy and energy renovation. This development is supported by the North Denmark Region in its capacity of being the only Danish climate region with fixed targets for the reduction of CO2 emissions, and likewise, each municipality has set up ambitious goals for the climate.



DID YOU KNOW...?

- North Denmark has 20 Mill. tourist bed nights every year.
- Tourism employs more than 7,000 persons in North Denmark.
- More than 27% of the North Danish Energy consumption is covered by sustainable energy.
- North Denmark is generating more sustainable energy per capita than any other Danish region.
- North Denmark counts 25,000 ha. of protected areas and more than 85,000 ha. of other nature reserves.

INITIATIVES

The Regional Council aims for a wide collaboration on a line of initiatives to facilitate an attractive North Denmark. The following items are of high priority while more may be added over the next four years:

- Enhancing the options for outdoor life, cultural life and experiences in North Denmark, enabling its continued contribution to settlement, industrial development, cohesion and quality of life.
- Making stronger ties between nature, culture, tourism and industrial development by enhancing the development of placebased potentials.
- Developing and disseminating the knowledge of coastal and outdoor tourism, industrial tourism and urban tourism through the national collaborations in this field.
- Supporting the collaboration for innovation between knowledge institutions, enterprises and consultants to develop better and more efficient green solutions within the fields of transport and energy as well as energy renovation.
- Collaborating with the municipalities on a strategic energy plan for North Denmark where the implementation of the strategy will contribute to an extensive development and production of green products.
- Taking initiatives to develop a foundation of knowledge and surveying the options of coordination within further development and planning within the fields of biogas and biomass.
- Continuing the collaboration with the North Denmark Region as a climate region including the further development of the effort to cover sustainability in a wider context than just the reduction of CO₂-emissions.
- Conducting investigations of pollution and clean-ups of soil contamination posing a threat to human health, subsoil water or surface water and nature.

THE PERIPHERAL PARTS OF NORTH DENMARK



The goal is to develop the peripheral areas as equal, active, industrious and sustainable local communities. Through relevant initiatives we should aim to develop the peripheral areas to the highest extent possible based on their individual natural positions of strength.

The peripheral parts of North Denmark are defined in the EU structural funds programmes as areas with special demographic and industrial challenges. As such they are facing a declining workforce, young people moving to large cities and a recession in traditional industries.

The peripheral areas must be developed to the highest extent possible based on their natural positions of strength. These areas should not be regarded as marginalised but rather as a resource with a variety of qualities and potentials making up a strength in the regional sharing and distribution of jobs. The new potentials of the peripheral regions are to a high extent to be found in the further development of industrial elements already present, eg. the food, tourism, energy, medical and maritime sectors. These industrial sectors are holding a high potential for growth.

Adding to the development of these often placebased potentials, we can make it happen by the focusing and branding of special local recreational values. We are already counting a line of good examples of the latter like Thy National Park and the Laesoe Saltworks that are pioneering in development, changeover or innovation of the roles/potentials of the

peripheral parts in a greater context of development. The ports of North Denmark are also placebased resources with fine potentials of development of both the traditional activities of ports and an interaction and synergy with their hinterland.

The sharing and dissemination of knowledge is a contributor to growth in the peripheral regions. Enterprises that are collaborating with the university are more innovative than those that don't. Such collaborations result in enterprises introducing a greater number of new products.

The access to further education and training and industrial qualifying educations must be ensured to give North Denmark a wide spread and geographically covering supply of industrial education qualifying educations on all levels. The extension of public transportation is important to mobility and the digital infrastructure is increasing the potentials of enterprises in communication, distance work, video conferencing and online services. Adding to this comes the option of distance workcentres in the region reducing the need for commuting between work and residence.



DID YOU KNOW...?

- 46% of the population in North Denmark are living in the peripheral areas.
- 44% of the workforce in the peripheral areas are holding a vocational education.
- Since 2008 the peripheral educations have seen a decrease of 9% in employment compared to 7% across the entire region.

INITIATIVES

The Regional Council aims for a wide collaboration on a line of initiatives to facilitate the peripheral regions of North Denmark. This is done based on a common strategy, in which all 3 fields of effort are including initiatives for the peripheral areas, and more may be added over the four years to come. From the fields of effort, special mention should be paid to:

- Reinforcing cohesion and mobility via a sound digital infrastructure – cabled and wireless.
- Enhancing the routing of Public Transportation for the benefit of commuting and a unified region.
- Improving the road connections between Thisted-Aalborg and Hanstholm-Skive-Herning and the Aggersund bridge.
- Continuing development of cluster organisations where sectors like food and maritime industries are strong in the peripheral areas.
- Facilitating collaboration between enterprises, knowledge environments and educational institutions.
- Encouraging applications for vocational secondary educations and minimising the rate of dropout.
- Enhancing the development of place-based potentials and the options for cultural life and experiences.
- Developing and disseminating the knowledge of coastal leisure and other types of outdoors tourism.
- Collaborating with municipalities on a strategic energy plan for North Denmark and supporting collaborations for innovations on green solutions.

INTERNAL AND EXTERNAL COLLABORATION

It is the aim to collaborate with other players to make the most of the potential for development of the region. This goes for the internal collaboration within the region and the collaboration with with players outside the region – for the benefit of citizens, enterprises and educational institutions of North Denmark.

Collaboration in North Denmark

The North Denmark Region, the municipalities and other players of the region are collaborating on the growth and development of North Denmark. In 2014 the 11 municipalities and the North Denmark Region established the association of "Business Region North Denmark" (the BRN). The object is to reinforce the collaboration on joint efforts, to better visualise the joint skills and qualifications of the region, and to attract a greater amount of external financing for activities of development.

Five central fields of the BRN

- Industrial development and creation of jobs
- Tourism
- Availability of a qualified workforce
- Infrastructure
- International collaboration

The players of North Denmark are also seeking to exploit the potentials of an enforced collaboration with partners outside of North Denmark like the other Regional administrations of Denmark and growth fora as well as international partners.

The Collaboration with other Regions

The North Denmark Region takes part in a line of collaborations with other regions. In 2015 the 5 Regions and the Danish Business Authority launched the project called "Boost of Growth for Small and Medium Sized Enterprises" In 2013 the three west Danish growth fora entered an

agreement for an enforced collaboration. In 2015 4 primary fields of collaboration were selected: Foodstuff, energy, health and welfare technology and the industrial Denmark of the future - Denmark as a country of manufacture. Adding to this comes the field of tourism where a new nationwide organisation is being established along with a cross regional cluster collaboration in the Jutland Corridor from the Southern Norway to North down to Hamburg to the South.

National and International Collaboration

The Growth Forum makes part of a committing collaboration with the national government through the annually revised Growth Partnership Agreement designating areas, in which the partners would be able to collaborate in particular. For example, in the Agreement for 2015 the Government and the Growth forum agree to enhance their collaboration with eg. three fields of effort. Strengthen Denmark as a manufacturing country. Fisheries, aqua culture and the Blue Denmark as well as the potential of growth in the Arctic. Globalisation has entailed new competition but also new markets for export. Production can be outsourced abroad but still, it has opened up North Denmark to new investments from abroad. All the while, there are still great potentials for development in our neighbouring countries, particularly in Norway and in relation to Green-land and the Arctic areas. A line of EU programmes are supporting the international collaboration. The most important are: The Horizon 2020, Creative Europe, and Interreg programmes, in which the Region will take an active part.



DID YOU KNOW...?

- Every year Growth Forum enters a growth partner agreement with the government.
- Business Region North Denmark was established in 2014 as the first collaboration on strategic development in Denmark between a region and all municipalities in that region.
- The EU Office of North Denmark takes part in attracting important EU funds to cover the effort for development and growth in North Denmark.



EFFECTS FROM THE STRATEGY

| MEASURING THE EFFECTS | BASIS FOR CALCULATION |
|---|--|
| A Coherent North Denmark | |
| By 2020 the funding of the 3rd Limfjord Crossing will be secured and well on its way. | The route across the island of Egholm has been determined on politically and the tracing has been cleared. |
| By 2020, 15 % more passengers will be using public transportation in North Denmark. | 35 Mill. passengers in 2013. |
| CO2-emissions from regional buses will be reduced by 7% in 2020. | In 2013, CO2-emissions from regional buses amounted to 30.6 Mill. tonnes. |
| 65 % customer satisfaction with public transportation in 2020. | In 2015, customer satisfaction is 62 %. |
| The three main traffic connections between the towns of Hanstholm-Skive-Herning, Thisted-Aalborg and Fjerritslev-Hobro are to be extended along with the need for capacity. | Existing analyses are available for the work on this task. |
| By 2020, the railway traffic will increase to a total of 4,8 mill train kilometres in connection with North Danish Railways taking over the operation from DSB. | In 2015 North Danish traffic amounted to 3,8 mill train kilometres. |
| By 2020, all North Danish citizens will have access to 100Mbit download and 30Mbit upload. | In 2013, 68% had access to 100Mbit download, and 41% to 30Mbit upload. |
| A North Denmark in Growth | |
| By 2020, productivity in the enterprises of North Denmark will at its least be matching the national average. | In 2013, productivity in North Denmark was 91% of the national average. |
| By 2020, 15% of the entrepreneuring enterprises will have developed into high-growth entrepreneurs. | In 2012, this figure was 13% of the entrepreneuring enterprises |
| By 2020, 50% of the enterprises in North Denmark will be housing activities of innovation. | In 2013, this amounted to 44 % of the enterprises |
| By 2020, investments in research and development will amount to 1,2 % of the BNP for North Denmark. | In 2013, this was 0,7 % of the BNP. |
| By 2020, at least 30% of a juvenile cohort are to choose a vocational education, either directly or after 9th or 10th grade. | In 2014, 25% of the graduates were enrolled on a vocational education. |
| By 2020, 85% of students enrolled on a secondary education will complete this education. | In 2013, 80%.are completing their education. |
| By 2020, less than 5% of the students on the vocational educations will be without an internship. | In 2013, this was 9% of eligible students. |
| By 2020, 55% of the workforce will attend a formal supplemental/further education (VFU). | In 2013, this applied to 46% of the workforce. |

For a detailed definition of individual goals and a description of methodologies of measurement and sources, please refer to Appendix 4.

MEASURING THE EFFECTS

BASIS FOR CALCULATION

An Attractive North Denmark

By 2020, the number of tourist bed nights within the region will be increased to 23 Mill. annually.

2013 saw 20.3 Mill. bed nights.

By 2020, the average daily spending by tourists will have increased to DKK 400.-

In 2013, DKK 361.- were spent per tourist per day.

By 2020, 40% of the energy supply in North Denmark will be generated from sustainable energy sources.

In 2012, this was 27% of the energy supply.

By 2020, the emission of CO2 in North Denmark will be reduced by at least 35%.

In 2012, the CO2 emission amounted to 7.8 mill tonnes.

By 2020, 2,100 locations in need of action to save ground water and area utilisation will have been investigated.

By the end of 2014, we had 4,030 locations unaccounted for in North Denmark.

By 2020, 81% of children in North Denmark aged 7-14 years will be involved in at least 6 activities in the fields of art and culture.

By 2012, 73% were attending at least 6 activities.

By 2020, 87% of adult North Danes will be attending at least 4 performing activities of art and culture.

In 2012, 78% of the North Danes were attending such activities.

The Peripheral Areas of North Denmark

From 2014 to 2020, the average annual rate of growth in industrial income per citizen will be higher than that of residents in non-peripheral areas.

During the period of 2007 to 2013 the average rate of growth was 1.0% per year in the peripheral areas, and 0.7% in non-peripheral areas.

By 2020, the decline in population in the peripheral areas will be stopped.

In the period of 2008 to 2013, the average annual decrease was 0.6%.

From 2014 to 2020, the development of employment in the private sector will be max 1.2% below the average of the Region.

In the period of 2008 to 2013, the development was 2.4 percentage points lower in the peripheral areas.

By 2020, the share of the workforce with a qualifying education will be increased to 68% in the peripheral areas, and the gap to the regional average will be max 1 percent point.

In 2013, 65% of the workforce in peripheral areas had a qualifying education, which was 1.8 percent point below the average of the entire region.

The number of passengers on the regional routes of public transport in peripheral areas will be maintained until 2020.

In 2013, this figure was 3,5 Mill. passengers.

By 2020, the number of tourist bed nights in the peripheral areas will have increased to 15 Mill. annually.

In 2013, this amounted to 12.8 Mill. bed nights.

Efforts of the Growth Forum Towards Business Sectors

5,000 jobs created in the participating private enterprises. 3 years after involvement in the effort.

4,200 jobs created in the period of 2007 to 2013.

4.5 Bill. DKK of added turnover in private attending enterprises 3 years after involvement in the effort.

3.5 Bill. DKK of added turnover in the period of 2007 to 2013.

In the period from 2014 to 2020, 22,000 persons will have completed courses to upgrade their qualifications through regional efforts.

In the period from 2007 to 2013, this figure counted 22,000 persons.

APPENDICES TO REVUS:

[APPENDIX 1 The Contribution of Growth Forum to Business Development and Growth Oriented Parts.](#)

[APPENDIX 2 Today's North Denmark](#)

[APPENDIX 3 Strategic Options And Recommendations](#)

[APPENDIX 4 Effects and Methodologies of Measurement.](#)

[APPENDIX 5 This is how we did – On Process and Inclusion in REVUS](#)

[APPENDIX 6: Mobility in North Denmark – Regional Priorities 2015](#)

[APPENDIX 7 Educational Plan Of The North Denmark Region 2015-2018](#)

[APPENDIX 8 Cultural Plan Of The North Denmark Region 2015-2018](#)

[APPENDIX 9 Agenda 21/Strategy for Sustainability of The North Denmark Region](#)

[APPENDIX 10 Strategic Plan of The North Denmark Region For The Field Of Soil Contamination](#)

Appendices 1-5 are appendices integrated in the strategy and were included in the public hearing.

Appendices 6-10 are associated appendices. They were not included in the hearing but they are making up background material and have functioned as an inspiration in working with the strategy.

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