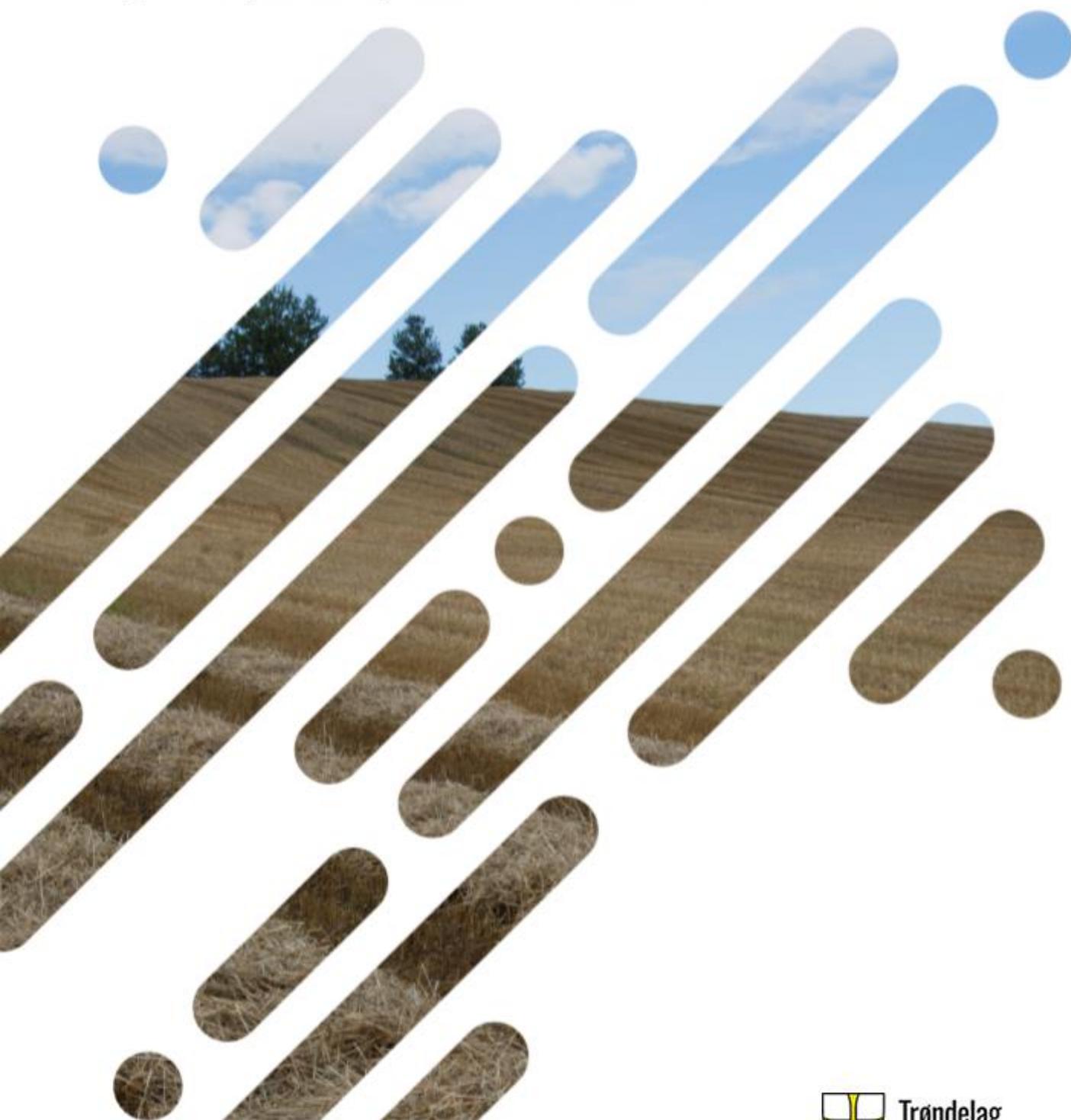




# VALUE CREATION IN TRØNDELAG

Strategy for innovation and value creation in Trøndelag

Approved by the county council on 14 December 2017



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# Introduction

The strategy “Value Creation in Trøndelag” is our first joint regional economic development strategy for the new Trøndelag. An important and essential part of the process in the merger of the two counties in Trøndelag has been focusing on cooperation, development of common understanding, getting to know each other and developing interaction.

The business sector in Trøndelag shall be competitive both nationally and internationally. It is also a goal that value creation and growth shall occur throughout Trøndelag. The strategy “Value Creation in Trøndelag” shall support the goal of an economically vibrant region. This is an important prerequisite for making Trøndelag a leading region for business and industry and achieving our main goal – increased value creation and international competitiveness.

Business development also deals with community development. There are clear connections between innovation and value creation on the one hand and the development of attractive jobs, competent employees and adequate workforce for our business sector on the other. It is important to look at the connections between business/industry and other areas of society from an overall and interdisciplinary perspective, especially when it comes to infrastructure and competence. Furthermore, access to good public services, an attractive living environment and meaningful recreational opportunities can contribute greatly to achieving our strategic goals. Although the strategy for innovation and value creation is an independent document, to achieve the strategy’s goals it must be seen in connection with strategies and action programmes in several areas of society.

Innovation and value creation occur in the interactions between the private sector, public sector and the scientific community. The strategy is normative for all public sector actors in Trøndelag and shall contribute to highlighting opportunities for the business sector in the region. The strategy focuses mainly on industries that contribute to increased exports from and reduced imports to the region. To achieve the goal of increased value creation, we are reliant on obtaining a larger proportion of the revenues outside our own region.

The business sector in Trøndelag comprises of many small businesses throughout the county’s many municipalities. This Strategy for innovation and value creation is designed with precisely this business structure in mind.

The time horizon of the strategy has not been clarified, but generally the strategies in Trøndelag shall have a four-year perspective, adapted to the election periods. An action programme has been drawn up to concretize the content of the strategy. The action programme contains specific measures and the distribution of responsibility for implementing them.

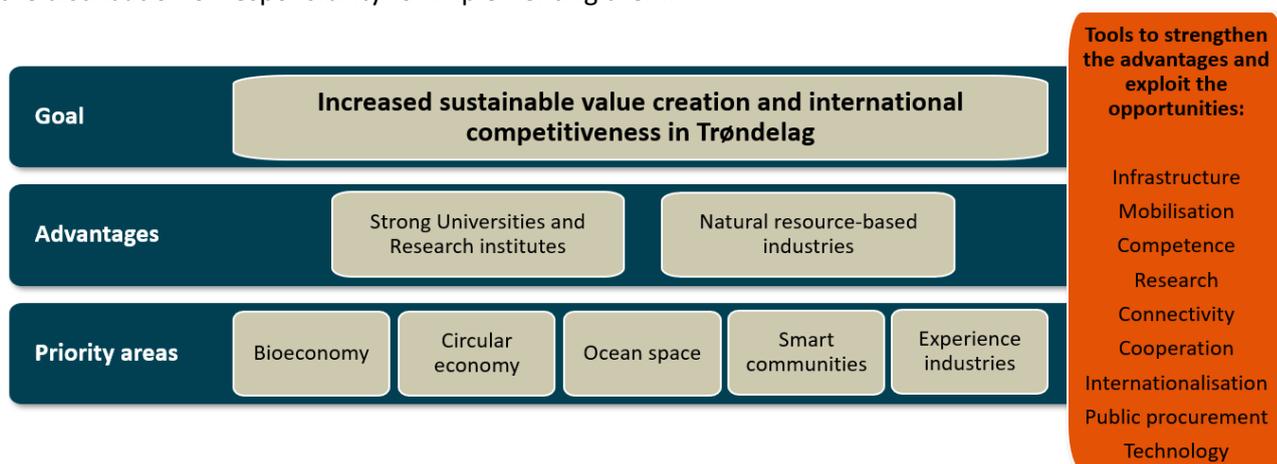


Figure 1: The figure shows the key themes in the strategy for innovation and value creation.

# 1 Development goals and strategies

## Overall goals

Increased sustainable value creation and international competitiveness in Trøndelag

## Common goals and strategies



Figure 2: Common goals and strategies are considered important regardless of theme, industry or area. The above goals apply for all the priority areas in the strategy.

## Development goals and strategies for the priority areas

Development goals	Strategies
<p><b>Bioeconomy</b></p> <p>Trøndelag is a leading region in the development of the bio economy</p> <p>Trøndelag's natural resources are used as raw materials for increased local and industrial production</p> <p>Trøndelag is Northern Europe's leading food region</p>	<p>Use production areas in an optimal manner</p> <p>Improve the cooperation between Universities, research institutes and the commercial actors</p> <p>Increased interaction between specialist communities to develop new, green industries</p> <p>Strengthen the interdisciplinary collaboration between the blue and green sectors</p>
<p><b>Circular economy</b></p> <p>Increased regional value creation based on smart resource use</p> <p>Minimize waste from production and consumption</p>	<p>Develop new business models for resource-efficient production and consumption of resources</p> <p>Increased utilisation of rest raw materials based on product innovation and business cooperation</p> <p>Replace fossil-based products with bio-based products</p>
<p><b>Smart communities</b></p> <p>Be a resource-efficient community with increased use of smart technology</p> <p>Have sufficient competence in the business sector and public sector to exploit the new technological opportunities</p>	<p>Use smart technology to achieve increase social, economic and environmental sustainability</p> <p>Use the competence bases in digital technology to develop the digital skills in the business and public sectors</p> <p>Use the region as a test arena</p>
<p><b>The ocean space</b></p> <p>Strengthen the region's strong position as a leading supplier of technology to ocean space-related businesses/industries</p> <p>Establish laboratory facilities to test new technologies</p>	<p>Develop a regional innovation hub with a technology focus</p> <p>Closer collaboration between industry and R&amp;D organisations</p> <p>Adaptation of areas and infrastructure for marine-based activities</p>
<p><b>Experience industries</b></p> <p>Be a national leader in experiences based on food and natural and cultural heritage</p> <p>Increased cooperation between the actors</p> <p>Increased and clear market orientation of products and services</p>	<p>Establish connectivity and cooperation between relevant actors and organisations</p> <p>Adapt for knowledge-based development and production of marketable products and services</p> <p>Make the experiences accessible to the market</p> <p>Prioritise experiences and stories that shall profile the entire region</p>

## Special conditions

### The Strategy's relationship with other plans and strategies

Regional planning is important for adapting government policies and national guidelines to local and regional conditions and putting these into effect. Trøndelag's Strategy for innovation and value creation is based on government guidelines, research reports and processes. It shall also include goals for regional strategies in areas such as R&D, internationalisation and competence development. The Strategy shall also support the plans and strategies of other actors. The Strategy is based on

- Regional planning strategy for Trøndelag 2016-2020
- Goals in the Trøndelag plan

The county master plan, called the Trøndelag plan, is the framework for the strategy and all other regional plans. The Plan contains overarching and long-term choices of direction for regional development. The County Council adopted the Trøndelag plan in December 2018. Decisions about the county municipality's activities and the actors we award contracts to, will be made on the basis of adopted regional plans and strategies. The plans and strategies will be followed up by action programmes containing specific measures and the distribution of responsibility.

### Process

As a basis for the preparation of this strategy, there has been a broad process of input meetings with the participation of municipalities and regions, the business sector, innovation communities, educational institutions, the youth committee in Nord-Trøndelag and the youth county executive in Sør-Trøndelag. The research report "*Knowledge base for value creation in Trøndelag*<sup>1</sup>" serves as a baseline for the process. The strategy has been written by an expert group consisting of representatives from Innovation Norway, the County Governor and the county municipalities.

### Community development role

The community development role involves mobilising and coordinating knowledge and resources from government, county council, municipal and private actors. Moreover, it is to contribute to an overall and accepted understanding of the main challenges a region faces as a basis for future development. The County Council's role of leading this work is legitimized as it is an elected body.

### Climate – the green transition in Trøndelag

In order to cut greenhouse gas emissions, use resources efficiently and achieve the green transition, we are dependent on the restructuring of industry and business. It is essential that such restructuring is profitable. The public sector has major influence over the efforts and development of the business sector through public procurement, subsidy schemes, land management and regional planning. It is important to maintain or preferably increase the biological production in agriculture, forestry and fishing/aquaculture.

### Balanced development

One of the main goals of the new Trøndelag county is that the region shall be economically vibrant, sustainable and competitive. The efforts to ensure balanced development in Trøndelag are based on a mutual dependence between Trondheim and the surrounding districts. A good dynamic between these districts with their natural resources, and the city's scientific community, cultural sector and business sector, can provide vibrant districts and an attractive major city.

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<sup>1</sup> Kunnskapsgrunnlag for verdiskaping i Trøndelag, TFOU-rapport 2017:10

## 2 Trøndelag's advantages

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### Industries based on natural resources

Trøndelag has complete agricultural, forestry and marine value chains. Furthermore, the region has international and national research and scientific communities as well as established networks and economic clusters.

#### *Marine resources*

Trøndelag has long traditions when it comes to harvesting marine species, but the region has gradually become known as a leading centre for modern industrial salmon production. The opportunities for value creation and growth which exist in the production and sale of premium seafood have contributed to significant value creation and employment along the coast. Trøndelag produces around 300,000 tonnes of salmon per annum, or just over 20% of national production. Around 95% of this production is exported to markets worldwide. In addition to salmon, other fish and shellfish from Trøndelag are exported to the same markets.

Trøndelag has large and productive marine areas that can be used for biological production on a scale far beyond the current level based on increasing the existing salmon production and/or industry based on farming new organisms. There is still a considerable potential for growth in the marine areas of Trøndelag.

#### *Agriculture*

Trøndelag accounts for approx. 20% of the total Norwegian food production and the county transports considerable amounts of food to other parts of the country. The total land resource in Trøndelag is 1.6 million decares, of which 1.1 million decares are pastures and 470,000 decares are grain areas. Protecting cultivated and cultivable land is essential for maintaining the county's production potential. Livestock farming is mainly based on local land resources, which ensures that most of the agricultural areas are in use. Dairy and livestock farming represent the highest share of employment and value creation. Versatile plant production provides good opportunities for climate-friendly modes of operation with crop rotation and optimal use of manure from extensive livestock farming. The market situation and the slaughtering structure determine the possibilities for increased meat production, while the receiving structure and wholesale sector are largely decisive for potatoes and vegetables.

Trøndelag has about 25% of Norway's certified organic farmland and almost 40% of the country's certified organic dairy cows. Given this scale, Trøndelag has an important role in the development of organic farming and efficient processing of the food. Furthermore, the region has organic production of grain, potatoes, vegetables, fruit and berries. Currently, 6% of the total cultivated area in Trøndelag is managed organically. There is an increasing demand for organic products and the Trøndelag region has the potential to gain a significant share of this growth in the years ahead.

#### *Forestry*

The forestry industry in Trøndelag has favourable conditions with access to markets, complete value chains for processing, raw materials and, not least, networks at both regional and municipal level. Trøndelag has a large wood-based industry. In addition to the heavy wood processing and sawmill industry, the county has a diversity of small and medium-sized businesses specialising in further processing of the wood.

Forestry makes a positive contribution towards achieving the climate goals. The forest's carbon storage in Trøndelag equates to 160 million tonnes of CO<sub>2</sub>. A steadily increasing proportion of carbon may be stored through increased use of wood in various constructions and buildings. The forestry industry needs more raw materials than available through the current level of felling. Consequently, a greater effort is required to log more mature forest. Equally important are more long-term measures to secure future access to raw materials for the forestry and wood industry. Trøndelag has the country's only national forest cluster in Innovation Norway's ARENA-program and its work on the renewal and development of the sector is of major interest both regionally and nationally.

### *Rural industries – utilisation of the farm’s combined resources*

There have been systematic efforts in Trøndelag to develop industries based on the farm’s combined resources. The rural industries cover service production, *Inn på TUNET* (Green Care), farm- and nature-based tourism, local food and experiences, etc. There is significant value creation from the supplementary industries, and we see increasing opportunities in this area.

### *Reindeer husbandry*

Reindeer husbandry is practiced in most municipalities in Trøndelag. There are 63 “siida” units divided among 10 grazing districts in the county, which involves just over 300 reindeer owners. In recent years, the reindeer population has been around 25,000 before calving. The annual harvest is approx. 300 tonnes. Furthermore, one reindeer grazing district in Nordland county has large grazing areas in the northern part of Trøndelag. The reindeer husbandry industry fully utilises its grazing capacity. The future potential lies in preventing the loss of land and damage by large predators and increasing work on product development involving reindeer meat and hides, as well as reindeer-related experiences.

### *Stone construction materials, industrial minerals, natural stone and metals*

Trøndelag has long traditions in mining. The annual turnover for the mineral industry is dominated by stone construction materials, industrial minerals and natural stone, with the first mentioned clearly the largest. The industry includes many small businesses with low turnover. The potential for mineral extraction must be seen in a long-term perspective, and realising this potential is dependent on several factors, including price, availability and infrastructure, access to capital, competence and national framework conditions.

## Universities, Research institutes and technological companies

### *The Universities, Research Institutes and technological companies*

The Universities, Research institutes and technological companies are key suppliers of knowledge and labour/expertise, while the scope and size of these communities make them an important industry in their own right. The presence of the Norwegian University of Science and Technology (NTNU) and the research institute SINTEF with their world-leading scientific communities, and Nord University with its strong entrepreneurial expertise and decentralised structure, represents one of the county’s biggest advantages. These institutions are of great significance concerning the development of specific industries, new companies in the form of start-ups and spin-offs, and the development of new products and services.

### *Renewable energy*

Trøndelag has major regional actors within the production, distribution and sale of renewable energy. These are important for both employment and value creation. These companies play a central role in work involving “The green shift”. They produce clean, renewable energy and are also relevant actors for implementing innovations within the category *Smart Communities*. area.

### *Industry in Trøndelag*

Trøndelag has long-standing and strong industrial traditions. Historically, industry is based on natural resources. The desired development of the bioeconomy requires industrial development of the natural resources in the region. In more recent times, industrial establishments are based on the region’s strong technology communities.

An ongoing digitalisation of society results in challenges and opportunities described in *Industry 4.0*<sup>2</sup>. The combination of strong industrial traditions and close collaboration with the universities and research institutes gives Trøndelag an opportunity for re-industrialisation. In this context, the Armed Forces’ increased presence and level of activity in Trøndelag also offers opportunities. Utilisation of Trøndelag’s potential for further economic growth depends on more efficient and purposeful interaction between the business sector, technology suppliers and R&D organisations, as well as through continuous development of these R&D communities.

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<sup>2</sup> The term Industry 4.0 refers to the fourth industrial revolution, whereby cyber-physical systems and the Internet fuse with production and products.

## 3 Priority areas

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### Bioeconomy

**Bioeconomy is value creation based on the sustainable utilisation of renewable biological resources.**

The production and processing of raw materials from the sea and land is experiencing strong growth and development and can provide major opportunities. Trøndelag must further develop the strong production communities and value chains in agriculture, forestry and aquaculture. There is great potential for better connectivity between the producers and the Universities and Research institutes.

Trøndelag is well positioned to develop the bioeconomy and contribute to a green transition. The region has advantages in the combination of major biological resources, complete value chains in the forestry, agriculture and marine sectors, as well as proximity to strong scientific communities. The challenge lies in developing good collaboration between the various actors and the sectors, not least across traditional value chains, e.g. collaboration between the blue and green sectors. Developing new green technologies can provide new opportunities for the industry. Moreover, it is crucial for the production industries to collaborate closely with the scientific and R&D communities when it comes to processing, breeding and production as well as land and resource management, etc. Industries that produce raw materials based on natural resources manage large areas of land and impact on landscapes and ecosystems. The attractiveness of these industries is crucial for further development and growth. Consequently, it is also important to link these business sectors with social science research.

### Circular economy

**A circular economy is an economic system aimed at reducing the use of raw materials, waste, emissions and energy so resources can remain in the economy for as long as possible.**

The innovation potential in Trøndelag lies in developing collaboration, business models and technology to ensure the resources are utilized in the value chain for as long as possible. The business sector in the region is well placed to increase value creation and local employment by developing new products and services based on unutilised residual products. The R&D communities' commitment to the circular economy gives Trøndelag access to knowledge and expertise that can give the region a leading role in this work. The

development of the circular Trøndelag requires open innovation processes, active participation in international cooperation and good coordination of actors in the innovation system.

### Smart communities

**The term smart community describes communities that use digital technologies as key tools for smart solutions for products, services and processes.**

The use of digitalisation and automation is linked with expertise about the opportunities for creating new products, services, processes and collaboration. These opportunities cross traditional industries and technologies.

When it comes to employment, business and industry, digitalisation also deals with automation, the streamlining of production, and creating and developing new business models and products. Getting more of the region's small businesses to use digital technology for innovation and product development is an important goal. Ways of achieving this include skills development initiatives and creating good physical and digital meeting places for the business sector and helpers.

In the public sector, this largely involves performing public services more effectively by means of digitising work processes. Performing public dialogue via electronic communication platforms offers greater opportunities for participation.

## Experience industries

**The experience industries cover businesses in what we traditionally perceive as the tourism industry, as well as actors related to food, nature and culture.**

Trøndelag has a wide range of events and organised experiences. They contribute to value creation in their own right, as well as for businesses in the tourism industry that provide accommodation, transport and other services to visitors, the public and participants. There is a potential for better cooperation between these actors.

The food, nature and cultural heritage of Trøndelag provide a basis for developing marketable products and services in the experience industries. Major events are important venues for promoting local food and cultural heritage. Events with regional, national and international participation or audiences attract more visitors to the region and promote Trøndelag in a positive way. These offers must be more accessible to the market in terms of visibility, marketable products and services, and through well-developed infrastructure in the transport area. New methods of communication have the potential to increase the attractiveness of the offers. In order to achieve value creation and efficient resource use, good cooperation between the business actors and the various public measures is essential.

## Ocean space

**The ocean space covers biomarine resources, commercial fisheries, marine energy, the marine environment, oil and gas, aquaculture, processing, shipping, and marine and maritime technology.**

The ocean space is one priority area where Trøndelag is well positioned within production and as a knowledge and innovation community. Knowledge and technology are prerequisites for achieving sustainable resource utilisation. Trøndelag's R&D communities have broad experience and expertise in fields such as shipping and ship technology, fisheries and aquaculture, offshore oil and gas and marine energy. Technological development is important for developing future activity in the ocean space.

Achieving the growth potential of the aquaculture industries in Trøndelag will require growth throughout the value chain.

Having the necessary actors and good interaction between them will be crucial towards succeeding with this. This includes establishing infrastructure such as laboratory facilities and marine incubators that cover the entire region. As part of the innovation system, the educational provision at the upper secondary and vocational college level must support such development. The development work should focus on digitalisation and robotization. Developing new technologies as part of the region's vibrant technology laboratories is important.

Oil and gas will remain a significant part of the future energy mix. However, value creation based on renewable resources will increase in importance in the years ahead. Trøndelag has a significant supplier industry which, along with the scientific communities, will continue to contribute to the sector's value creation.

## 4 Tools – how to exploit our advantages?

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### Infrastructure for economic development

Good infrastructure is a prerequisite for economic development and value creation. Good and predictable land use, development and upgrading for the expedient transportation of goods and passengers by road, sea and rail are decisive for businesses throughout Trøndelag. Access to and adequate capacity for broadband, mobile networks and electricity are important for businesses in every municipality of Trøndelag. Consequently, the development of good infrastructure solutions throughout Trøndelag is important for households, the business sector and municipalities. Increased production in our basic industries, such as agriculture, forestry and seafood, places major significance on the development of necessary infrastructure for transport and communication. The transport and communications strategy for Trøndelag indicates the direction for work to achieve better infrastructure.

### Mobilisation for development

Trøndelag is well placed to succeed with innovation and value creation. The region has many strong scientific, technology and innovation communities and innovative businesses. Furthermore, Trøndelag has a long tradition of cooperation between the education sector and the business sector at all levels and has important communities for entrepreneurship and innovation.

Many technology companies have their origins in the scientific communities in Trondheim. They are important for employment and value creation, while also contributing decisive technology and expertise to industries throughout the region.

Many small businesses do not have adequate time and resources to work on development and hence do not prioritise participation in arenas, networks or various development projects to any great extent. This is also reflected in the significant regional differences in the use of R&D, particularly between companies located in Trondheim and in the rest of Trøndelag. A key task is mobilizing actors throughout the entire region to participate in various initiatives focusing on development. Many actors play a central role in this context: Trøndelag County Council, Innovation Norway, the innovation companies, the municipalities through their frontline services and actors in the agricultural sector. The R&D strategy for Trøndelag is also normative for this work.

The public measures will often be a triggering factor for the business sector to be able to start a development process. We have several different financial measures that are sufficient during an initial phase. However, the business sector also requires access to capital in order to finance major development projects. In this context, more capital than the public sector can contribute will often be necessary. Consequently, we have an important role to play in contributing to ensuring that the business sector in Trøndelag can gain access to the necessary capital in the private market.

### Competence

Access to labour and expertise is essential for achieving growth and development in the business sector in Trøndelag. Trøndelag consists of regions with different business structures and differing access to education and research. Some areas of the business sector experience challenges acquiring employees with the competencies they need covering vocational, higher vocational and academic qualifications. In order to ensure the business sector has access to suitably qualified employees, it is important that young people in Trøndelag make good and informed choices that lead to employment as well as ensuring the individual has opportunities for lifelong skills development. This must be achieved through professional career guidance and systematic collaboration between the education sector and working life from kindergarten through to university.

Many small businesses have a low level of awareness when it comes to their competence needs. Through measures such as competence surveys, the innovation community, development companies and municipalities have contributed to raising awareness and creating connectivity between businesses and new expertise. It is important to motivate more businesses to take on apprentices, collaborate with students and actively use the trainee schemes in Trøndelag. For these efforts to succeed, good local and regional cooperation is necessary between those responsible for training, business development and adaptation/restructuring.

In order to ensure that the education provision corresponds with the competence needs of the regional business sector, it is necessary to further develop a more systematic dialogue between the business sector and the various competence providers.

Through its responsibility for the upper secondary schools and the vocational colleges, the county municipality has an important role in facilitating this dialogue. Through this dialogue, the businesses and the competence providers must be challenged to collaborate to achieve more flexible continuing and further education programmes. The regional strategy for labour and competence, which is currently being prepared, will also be normative for this work.

## Research

Research and knowledge are important driving forces in the development of Trøndelag, and much of the knowledge that is developed is directly applicable to private and public sector enterprises in the region. The R&D communities also contribute to strengthening the business sector through offshoots and developments that occur in the cooperation between business/industry and R&D. One challenge in developing the public sector is lowering the threshold for utilising research in one's own development work. This covers service areas as well as management tasks. Consequently, the R&D strategy draws attention to how research can contribute to innovation in the public sector.

A key challenge for both the private and public sector is ensuring that research and resources for research benefit the entire Trøndelag county. At a national and regional level, we observe large differences in R&D activity between urban and rural areas, while the size of the enterprises is also significant for the R&D activity. For example, a large proportion of small businesses and municipalities in Trøndelag utilise R&D to a low extent because they lack resources and expertise. In order to remedy this, several new instruments have been established in recent years to create a better balance in this context. Examples of this include *SkatteFUNN* (a tax-credit scheme for R&D projects), *Regional Research Fund* and *DistriktForsk*. This will often provide an opening to major national research programmes and the EU programmes.

Increased research collaboration between the business sector and the R&D communities, as well as mobilisation to and better utilisation of the various instruments associated with research, will be essential to increase the value creation. The R&D strategy for Trøndelag is normative for this work.

## Technology

Trøndelag has a special advantage when it comes to technological expertise based on NTNU, SINTEF and companies established on the basis of these communities. Utilising these resources optimally is crucial for the development of the region's business sector. An important instrument in this context is the many students who can benefit the businesses through different forms of collaboration while they are studying, and by continuing to work in the region after completing their studies.

## Connectivity

Industries and clusters that are relatively close from a knowledge perspective and are in the same technology or knowledge area create a good basis for cross-industry innovation and collaboration. The cooperation between offshore and aquaculture, where the purpose is experience and

technology transfer, is a good example of such a “crossover”. It is important to facilitate connectivity across industries, value chains, clusters, educational institutions and the R&D communities in the region.

## Interaction in the innovation system

Good interaction between the actors in the regional innovation structure is a prerequisite for succeeding in achieving the goals in this strategy. Interaction occurs in partnerships, networks, clusters, meeting places and projects, as well as in other forms of contact and communication. For interaction to function well, it is important that the actors are aware of and accept the structure and role distribution, and that the cooperation climate is based on openness and trust. One measure in this respect is establishing regional partnerships for business development in Trøndelag. The partnerships should have a broad composition with representation from the various actors in the innovation system.

The key actors and their roles in Trøndelag’s innovation system will be described in more detail in the action programmes.

## Internationalisation

Internationalisation is important for business and community development. Trøndelag is not among Norway’s largest export counties, and a purposeful effort must be made to achieve an increase in this area. Participation in international cooperation and projects contributes increased resources and expertise to the region. Priority is given to areas where international involvement provides added value to the region. EU programmes provide clusters, R&D actors, business parks and organisations with opportunities to cooperate with other regions in Europe. We must pay special attention to measures that contribute to small and medium-sized businesses developing their export opportunities.

Innovation Norway has a large network of offices in many countries that can provide strategic advice about the specific market, export guidance and courses/programmes.

Participation in EU projects shall contribute towards strengthening the agreed priority areas. International programmes such as *Interreg*, *Horizon 2020* and *Erasmus +* are examples of important funding tools for development and knowledge projects in Trøndelag.

In order to contribute to increased expertise, business opportunities and networks, Trøndelag must develop a level of preparedness to receive inquiries from other countries about establishing businesses in the region. Internationalisation is one area where a new strategy must be drawn up.

## Public procurement

The public sector spends NOK 500 billion on goods and services for every year. Consequently, public procurement is increasingly being considered as a strategic and operational tool for converting challenges into opportunities. In Trøndelag, for example, the county council actively uses its purchasing power to achieve its adopted climate goals. In the transport sector, as well as in the development of school buildings, innovative public procurement has contributed to new technological solutions and opened new opportunities for business development and innovation.

In the years ahead, there is a need to attach importance to creating innovation through public-private collaboration. Innovative procurement of goods and services deals with the public sector being a driving force and demanding future-oriented solutions to create a public sector that is more modern and economically sustainable.

This must be developed in collaboration with the business sector. The public sector must be even more aware of how to use its purchasing power to promote green and high-tech innovations.