Central Denmark Region as
The Leading Energy and Environment Region
Vision and Targets for a Common Regional Effort
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Preface

Central Denmark Growth Forum is a partnership between municipalities, business organisations, the labour market parties, educational and research institutions, and the region.

The partnership serves to create growth and business development in the entire geographical Central Denmark region. Consequently, a strategy for the business development in Central Denmark Region in the period 2007-2009 has been formulated.

The Growth Forum has decided to focus on 3 areas in which the region has particularly favourable market conditions. These focus areas are:

- **Energy and Environment**
- **Health – Business**
- **Food**

**“Central Denmark Region as the Leading Energy and Environment Region”** is a vision for the development in the energy and environment sector. This brochure encompasses the thoughts behind the vision as well as a description of the region’s powerful background in this area. Further to this is a number of the overall targets that are meant to carry the vision based on the region’s existing business structure, the production of renewable energy and the industry’s future needs.

The targets have been formulated in a way so they support the targets of the Danish government and the EU for energy and environmental development. In this way, the Growth Forum seeks to ensure the regional business development in a long-term perspective.

However, fulfilment of the ambitious vision necessitates that all regional players contribute by defining and coordinating the common development interests. Consequently, companies, R&D institutions, energy producers and consumers, regional and municipal councils are invited to take active part in the fulfilment of the targets by establishing networks and cross-disciplinary collaborations on product development, knowledge sharing, knowledge dissemination and use of new technology.

The Central Denmark Growth Forum contributes to the target fulfilment through two-year action plans that are based on the technology areas which in near future are expected to contribute significantly to the region’s business development. The relevant focus areas for 2007-2008 are described in a separate brochure.

Bent Hansen
Chairman of Central Denmark Growth Forum
REGIONAL POTENTIALS AS BASIS FOR LEADING THE WAY

An ambitious vision stating that Central Denmark Region is a national and international pioneer region for renewable energy and environmental technology presupposes an explicit description of the region’s current position. In the following, the region’s status and potentials in relation to the remaining part of Denmark in all the fields, where overall targets have been formulated, are described.

BUSINESS
As opposed to the capital region among others, Central Denmark Region has a strong specialisation within traditional business e.g. furniture, clothing and food. These are resource areas where the employment growth has been declining in recent years.

1999-2003 Growth in Selected Resource Areas

<table>
<thead>
<tr>
<th>Resource Area</th>
<th>Full-time employed</th>
<th>Turnover</th>
<th>Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food</td>
<td>-4%</td>
<td>13%</td>
<td>17%</td>
</tr>
<tr>
<td>Furniture/Clothing</td>
<td>-6%</td>
<td>9%</td>
<td>17%</td>
</tr>
<tr>
<td>Medico/Health</td>
<td>11%</td>
<td>32%</td>
<td>37%</td>
</tr>
<tr>
<td>Energy/Environment</td>
<td>8%</td>
<td>36%</td>
<td>97%</td>
</tr>
</tbody>
</table>

Source: Aarhus School of Business, University of Aarhus

However, Central Denmark Region stands out on account of its strong specialisation within the resource areas Energy and Environment.

Along with Medico/Health, Energy/Environment is the resource area in Denmark with the highest growth in the private sector, turnover and exports in recent years. As a result, Energy and Environment is an obvious focus area for Central Denmark Region.
Central Denmark Region is strongly specialised within the energy and environment sector. This is partly due to large companies such as Vestas Wind Systems, Siemens Wind Power and Grundfos but also the fact that many regional SMEs already are specialised in this field – either with own products or as subcontractors.

Central Denmark Region has a particularly high concentration of companies within the wind and biomass area. Compared with the other Danish regions, Central Denmark Region has an absolute position of strength within the energy and environment sector.
Central Denmark Region is strongly specialised within the energy and environment sector and has an absolute position of strength within the wind and biomass areas.
The Danish environmental technology exports and energy guidance amounts to approximately DKK 50 billion per year – the world market DKK 4,100 billion.

DANISH ENERGY AND ENVIRONMENTAL TECHNOLOGY ON THE GLOBAL MARKET

Denmark has a strong position on the global market for products and services for the energy and environment sector. This is partly due to an age-long environmental measure and energy planning as well as an efficient collaboration between private and public companies.

The total value of the Danish energy technology exports and energy guidance is by the Danish Energy Authority estimated to approximately DKK 50 billion per year which corresponds to approximately 8 percent of the total Danish exports. Of these 8 percent, the wind turbine industry alone accounts for approximately 50 percent. Danish companies are also in a favourable position within biomass and district heating. Further to this is the value of exports of definite environmental technology.

The global focus on energy and environment means that the markets are growing rapidly. The EU Commission estimates that annually the world market for environmentally effective technologies is at a level of DKK 4,100 billion and experiences a growth of 5 percent per year. One third of this marked lies within the EU.
Great Potential
As a result, there is a continuing large amount of unutilised potential within the energy and environment sector for the region’s many manufacturers and associated service and commercial activities. There is a possibility for Central Denmark Region to harness the experiences from the wind turbine industry to also create growth in other renewable energy areas.

Today, the wind turbine industry is concentrated on having large companies along with Vestas and Siemens in the lead of the industry. However, the Danish wind turbine success story was founded and is still anchored in several smaller companies. Experience shows that the success of the wind turbine industry was created via knowledge sharing and user-driven innovation. At the same time, stable political and economical framework conditions were significant prerequisites. Important conditions include:

- An actual market for the technology
- Research, development, demonstration and education
- Capital
- Infrastructure
- A critical amount of companies

These conditions must also be present when new energy and environmental technologies are to be developed.

In addition, experience from the wind turbine industry proves that the best technologies are not easily identified beforehand. Energy technological innovations most frequently emerge by combining more or less known technologies and a systematic use of these. Often, existing technologies must be rethought and combined in a new and innovative way.

In brief, it is important to support innovation in SMVs and to strengthen the conditions for the region’s companies.

Several Gains
Besides being significant contributors to business development in Central Denmark Region, energy and environmental technologies will be able to contribute to an increased production of renewable energy and thus reduce the dependency on fossil fuels. Last but not least, the technologies will be able to provide significant environmental gains including the creation of new possibilities for agriculture to meet the increasing environmental requirements.
PRODUCTION OF RENEWABLE ENERGY

Today, the production of renewable energy represents 14 percent of the total energy consumption in Denmark. Of these 14 percent, biomass accounts for 39 percent (wood, straw, biogas etc.), waste 31 percent and wind 20 percent. As illustrated below, Central Denmark Region is also a highly significant contributor to renewable energy in this area. The proportion of renewable energy amounts to 22 percent.

Renewable Energy in % of the Total Energy Consumption* in Denmark and the Region

*Total energy consumption is the consumption of electricity, heat and transportation altogether

Wind

Today, approximately 20 percent of the Danish electricity consumption is covered by wind power. In comparison, the electricity coverage is 26 percent in Central Denmark Region.

More than ¼ of the total wind power production and more than 1/3 of the land-based wind power production is located in Central Denmark Region. The main part of the wind turbines is located in the western part of the region. This is partly due to the good wind conditions on the west coast but also due to an active, political measure in relation to identifying suitable locations. According to the Danish government’s long-term plan, wind power must gradually be increased to such an extent that wind power alone will cover 50 percent of the electricity supply in 2025. This can be done by expanding wind power with sea based wind turbine parks. At national level, forward plans of 4600 mega watt new wind power on the sea are being provided until 2025.

The expansion in wind power can also be fulfilled by changing older and relatively small wind turbines with large, modern turbines. However, the challenge here is to ensure that the expansion will take place in such a way that conflicts with neighbours and environment will be avoided.
Central Denmark Region as the Leading Energy and Environment Region

Production of wind power in Central Denmark Region, 2007, GWh

Interval Distribution
- 0 to 100 GWh
- 100 to 200 GWh
- 200 to 300 GWh

Production locations and values:
- Lemvig: 250 GWh
- Ringkøbing-Skjern: 228 GWh
- Holstebro: 124 GWh
- Struer: 68 GWh
- Skive: 178 GWh
- Randers: 190 GWh
- Viborg: 66 GWh
- Silkeborg: 42 GWh
- Favrskov: 56 GWh
- Skanderborg: 59 GWh
- Århus: 23 GWh
- Horsens: 24 GWh
- Odder: 24 GWh
- Ikast-Brande: 42 GWh
- Hedensted: 52 GWh
- Samsø: 107 GWh
- Norddjurs: 99 GWh
- Syddjurs: 40 GWh
- Lemvig: 250 GWh
- Ringkøbing-Skjern: 228 GWh
- Holstebro: 124 GWh
- Struer: 68 GWh
- Skive: 178 GWh
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- Hedensted: 52 GWh
- Samsø: 107 GWh
- Norddjurs: 99 GWh
- Syddjurs: 40 GWh

The map shows the production of wind power across the region, with varying intervals of production values.
Central Denmark Region is in a particularly favourable position to utilise the potential from biomass – 1/3 of Denmark’s agricultural land and livestock production is located in Central Denmark Region.
Biomass

Today, energy from biomass amounts to 12 percent of the total energy consumption in Denmark. The biomasses consist of e.g. straw, wood, biogas and biodegradable waste. In Central Denmark Region the biomass proportion of the energy consumption is 15 percent. Generally speaking, the potential of e.g. waste and wood is already utilised today, but a large potential in exploiting residual products and crops from agriculture for energy purposes remains.

**Potential in Production of Renewable Energy in Central Denmark Region**

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Potential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy crops</td>
<td>0,2</td>
<td>15,9*</td>
</tr>
<tr>
<td>Straw</td>
<td>5,4</td>
<td>8,0</td>
</tr>
<tr>
<td>Animal waste</td>
<td>0,3</td>
<td>7,2</td>
</tr>
<tr>
<td>Gras/extensive crops</td>
<td>0</td>
<td>1,5</td>
</tr>
<tr>
<td>Oil production, rapeseed</td>
<td>0,9</td>
<td>1,2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>6,8 PJ</td>
<td>33,8 PJ</td>
</tr>
</tbody>
</table>

*Source: University of Aarhus,*

*The potential calculation is, among other things, based on fallow areas and a reduction in the cereal area for export.*

With approximately 1/3 of the Danish agricultural area and animal production, Central Denmark Region is in a favourable position to contribute to the utilisation of the biomass potential. Further to this is the potential in using residual products from e.g. animal feed and the food industry for energy purposes. However, this potential has not yet been determined.

Biomass can be used as input in many different technologies with various end products. Today, biomass can be used for e.g. production of heat, electricity, gas, hydrogen and liquid biofuels.

Utilisation of the region’s energy resources in the biomass sector can generate major environmental advantages and, at the same time, ensure that the production is carried out in a manner which does not harm the landscape.
THE ENVIRONMENT

An increased production of renewable energy alone produces an environmental effect since the amount of energy produced replaces the production from fossil fuels. In this way, it is possible to reduce the emission of the greenhouse gas CO2.

As a result of its relatively high proportion of renewable energy, Central Denmark Region has a reduced emission level of the greenhouse gas CO2 compared to Denmark on the whole.

By establishing ambitious targets for the production of renewable energy, Central Denmark Region will be able to achieve Denmark's international targets in relation to reducing the emission of greenhouse gases (Kyoto and EU).

Energy as Basis for Creation of Renewable Energy
Energy is also used for producing renewable energy in e.g. land utilisation systems for planting, tending and harvesting of crops as well as in the production process itself where the raw material is converted into e.g. electricity and heat. In the conversion process from one energy form to another, considerable amounts of energy are lost. Furthermore, the energy and environmental effect can vary considerably in different renewable energy systems.

Perennial Crops
On the other hand, it is possible to obtain a number of positively derived environmental effects. For instance, growing of perennial energy crops can result in the reduction of nutrient and pesticide leaching for drinking water and the aquatic environment.

To a great extent, the growing of perennial energy crops contributes to the reduction of the greenhouse effect since CO2 becomes bound as carbon in the soil and less nitrous oxide (N2O) is emitted to the atmosphere. Nitrous oxide is a very powerful greenhouse gas – 300 times as strong as CO2. On the other hand, unrestrained energy cropping can also have a negative impact on e.g. landscape values.

Holistic View
To ensure the best possible utilisation of the region’s renewable energy resources and to obtain the greatest possible environmental effect, it is important to have a holistic view where both direct and indirect effects in the different levels of the energy supply chain are included in the assessment. Holistic solutions and documented effects are decisive parameters when the region’s companies are to compete on the global market.
Central Denmark Region as the Leading Energy and Environment Region
\[ -\frac{1}{2} \frac{M v^2}{2} + \frac{1}{2} \frac{1}{2} l w^2 \]
**KNOWLEDGE AND EDUCATION**

Experience shows that the foundation of the wind turbine industry was created in the companies. It also shows how important it was that research and educational institutions supported the industry. Today, the magnitude of the wind turbine industry makes it possible for the industry to conduct its own R&D.

**Employed with Higher Education within Energy and Environment**

<table>
<thead>
<tr>
<th></th>
<th>Central Denmark Region</th>
<th>Region of Southern Denmark</th>
<th>Region Zealand</th>
<th>Region North Jutland</th>
<th>Capital Region of Denmark</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of total workforce in 2004</td>
<td>17.5</td>
<td>15.7</td>
<td>8.0</td>
<td>12.7</td>
<td>16.1</td>
</tr>
<tr>
<td>Growth in % from 1995 to 2004</td>
<td>131</td>
<td>83</td>
<td>33</td>
<td>28</td>
<td>5.0</td>
</tr>
</tbody>
</table>

*Source: Aarhus School of Business, University of Aarhus*

With the newly expanded University of Aarhus to lead the way, Central Denmark Region has a number of research institutions that will support technology development, documentation and knowledge sharing. Within the biomass area in particular, the University of Aarhus has a number of research and knowledge environments at a high international level.

**Wind Power Research**

Danish research is also world leading in the wind turbine field. The regional wind energy research takes place primarily at the large wind turbine producers. In addition, there are a number of public and private knowledge centres and consultancy services in the region. Several of these are highly specialised within the energy and environment sector.

**Strong Educational Profile**

The region’s specialisation in the energy and environment sector is not only reflected in the need for R&D but also in the need for labour. The need for highly educated labour in particular has increased significantly.

Today, Central Denmark Region has the highest proportion of employed with higher education within the energy and environment sector. However, there is a need for even more specialists. With respect to education and further training of specialised labour, Central Denmark Region has a large number of educational institutions with a strong energy and environment profile.
The previous paragraph documents that Central Denmark Region already has a position of strength in the energy and environment sector. Energy and environmental technology has developed into a global field of interest in which forward plans of huge investments are being provided worldwide - with a view to being able to fulfil political climate targets, among other things.

The Central Denmark Growth Forum’s energy and environmental strategy will be prepared in such a way that it will support the targets of the Danish government and the EU for the development in the energy and environment sector. By integrating the regional targets with national and international targets, the Growth Forum contributes to regional business development in a long-term perspective. Among other things, the region will strive to attract great attention to its measures with a wider audience.

It is important that the focus on energy and environment is based on the region’s natural resources and on the existing company structure that is based on a majority of SMVs.

On the other hand, the technologies that should be used to best utilise the available resources have not been identified. The past 20 years have been characterised by comprehensive technological development. It has proven impossible to predict exactly which technologies that would gain ground and which technologies that were only characterised by periodic success. As a result, it involves a high risk to point out single technologies for the implementation of the energy and environment target.

Central Denmark Growth Forum plans to manage its measure through a number of broad but yet specific targets. The measure’s overall targets are ambitious and can only be met if a large number of players contribute. In other words, there is a need for many measures. Central Denmark Growth Forum is only capable of implementing a few. Hopefully, the overall targets will create the framework for a diverse and coordinated effort.
TARGET FOR BUSINESS DEVELOPMENT

The market position of strength is a strong argument for encouraging further business development. The business development must specifically be aimed at the following targets:

- That Central Denmark Region experiences a higher growth in the proportion of highly educated labour in the resource areas Energy and Environment than the remaining Danish regions
- That, among the regions, Central Denmark Region has the highest proportion of employed within the resource areas Energy and Environment
- That the companies in Central Denmark Region increase the total invoiced sales and exports within the resource areas Energy and Environment
- That product and process innovation increases in regional SMVs working with energy technology
- That the interrelationship concerning innovation in the entire value chain from primary production to service sectors increases in the resource areas Energy and Environment
- That more regional business clusters are created within the energy and environment sector
The Danish Government’s and Central Denmark Region’s Targets for Renewable Energy
TARGETS FOR DEVELOPMENT IN THE PROPORTION OF RENEWABLE ENERGY

The EU Commission has established the overall target that at least 20 percent of EU’s total energy consumption must originate from renewable energy sources in 2020. In comparison, the aim of the Danish long-term politics on energy is that in 2020 at least 30 percent of the Danish energy consumption must be based on renewable energy. On national level, the government’s target means a doubling of the current situation.

Central Denmark Region in the Lead
With a renewable energy production of 22 percent of the total regional consumption, Central Denmark Region is already above the EU aim for 2020 and close to the national targets for 2020. This position must be maximised to fulfil even more ambitious targets based on the resource foundation that is prevailing in the region.

Wind Power is Expanded and Optimised
Today, 26 percent of the total electricity consumption in Central Denmark Region originates from wind power. The projected expansion of wind turbines means that this figure will increase to more than 30 percent in 2010. In 2025 the region may expect that approximately 40 percent of the total electricity consumption is based on wind power.

As the wind power expands, it will be a huge challenge to utilise and handle the highly fluctuating electricity production. As a result, the effort of Central Denmark Region must focus particularly on supporting an improved utilisation of electricity from wind power in the supply systems.

Doubling of Biomass Proportion is Feasible
Correspondingly, the current energy utilisation from biomass amounts to approximately 15 percent of the region’s total energy consumption. However, potential calculations from the University of Aarhus show that this proportion can be doubled without compromising the food production.
Based on the above, the following target for the development of Central Denmark Region is established:

- The production of renewable energy must be increased to such an extent that it will account for 50 percent of the total energy consumption in 2025

The target will be reached via an improved utilisation of renewable energy in the total energy system, i.e. in electricity and district heating systems as well as in the transport sector. In addition, the proportion of renewable energy from biomass must be doubled in 2025 compared to 2005.
ENVIRONMENTAL TARGETS

The Kyoto Protocol sets the international and national framework for reductions in the CO₂ emission. On the opposite page, the figure shows the current status of the CO₂ emission as well as EU’s and Denmark’s climate political obligations to reduce the CO₂ emissions during the obligation period 2008-2012 until 2020.

In 2005, Central Denmark Region has a significantly lower level of CO₂ emission per inhabitant than the remaining part of the country. Central Denmark Region will provide a considerable strategic contribution to obtain the national targets for 2012 and 2020. The overall target for this contribution is:

● To be the leading region for demonstration of cleaner energy technology in connection with UN’s convention on climate change in Copenhagen in 2009

● The Kyoto Protocol 2008-2012 opens up the possibility that countries may include CO₂ and other greenhouse gas reductions as a result of changes in agriculture. This setup may prove attractive to Denmark mainly because of improved manure handling derived from the aquatic environment plan in recent years. In agriculture it is also possible to reap a number of derived environmental effects in relation to e.g. contamination of drinking water and the aquatic environment.

As a result, the partial aims of the effort are as follows:

● To clarify the possibilities for reduction of greenhouse gases in various types of farming with a view to energy production

● To reap a number of derived environmental effects in the agricultural field

At the same time, the effort is based on the technology areas which in near future must be expected to contribute significantly to the region’s business development. In doing so, the region will also support technologies with long-term development potentials.

The Growth Forum’s own contribution to the realisation of the vision is described in a specific brochure elaborating on a number of focus areas.
Status and Targets for Energy Based CO₂ Reduction in Denmark and the EU

Source: The Danish Energy Authority and Eurostat, not corrected for climate variations
OVERVIEW OF FOCUS AREAS IN CENTRAL DENMARK REGION

Central Denmark Growth Forum’s action plan for energy and environment contains six specific focus areas in which activities will be initiated. All focus areas relate to reaching the measure’s overall targets and must support the development of the market for the companies’ technologies and products at both the strategic level and by initiating specific activities and demonstration projects in collaboration with a number of players. The focus areas are:

1. Strategic Management
Central Denmark Region intends to create such favourable framework conditions that it will become the leading region within energy and environment. Part of the measure is aimed at the collaboration with the municipalities concerning the charting of positions of strengths and potentials as basis for the completion of local action plans and the development of specific renewable energy locations. Specific projects are intended to strengthen the popular involvement in renewable energy and to create exposure to the region’s companies in national and international connections. The region will also lead the way in Denmark with requirements for utilisation of renewable energy in the regional financed public transport.

2. Technology Development Programme
Today, there are many companies in the region that work within energy and environment. Even more companies in neighbouring branches are expected to develop the potential within this area. In order to create the desired development, a technology development programme consisting of consulting services for a wide group of SMVs within energy and environment will be established. The purpose of the programme is to strengthen the development of new technological products.

3. Improved Utilisation and Integration of Electricity from Wind Power
The electricity system in the western part of Central Denmark Region is unique in national and international connections, primarily because of the substantial energy production from wind power. The energy production from wind power must be increased and this demands integration with the remaining energy system. Initiatives will focus on further development and demonstration of technologies that support an improved utilisation and integration of wind power electricity. The aim is to develop a new regional and national technological position of strength with great export potential.

4. Correlation between Energy and Environment
Biomass in the form of e.g. crops, waste, algae and residual products from agriculture, industry and households can be used as input for various technologies and subsequently converted into electricity, heat, gas, hydrogen and liquid motor fuels. Carried out correctly, the added bonus will be considerable advantages for both nature and environment. The effort will focus on developing further and demonstrating new technologies and systems for sustainable energy production on the basis of biomass. The target is to change a number of the
current environmental challenges and problems into new opportunities for business development, exports and production of renewable energy.

5. Testing and Proving
In the wind and biomass sectors there is an essential need to document and test new products. However, the needs of the two areas are quite different. The established wind turbine producers’ needs for testing concentrate on gaining access to suitable areas for testing of new prototypes. In the biomass field, a national test centre, which is to support test and certification, will be established in the region.

6. Environment Technology
At first, efforts are defined to include environment technologies in relation to energy production. Later on, efforts will be developed to also include other environment technological areas.

For further information about the focus areas and how to submit project ideas, please visit www.rm.dk/via3938.html.

CONVERSION TABLES AND KEY FIGURES

Conversion Table, Joule
1 kilojoule (kJ) = 1000 J
1 megajoule (MJ) = 1000 kJ
1 gigajoule (GJ) = 1000 MJ
1 terajoule (TJ) = 1000 GJ
1 petajoule (PJ) = 1000 TJ

Conversion Table, Watt hours
1 kilowatt hour (kWh) = 3.6 MJ
1 megawatt hour (MWh) = 3.6 GJ
1 gigawatt hour (GWh) = 3.6 TJ
1 terawatt hour (TWh) = 3.6 PJ

Denmark’s Energy Consumption and Energy Production in 2005
Total Danish energy production = 1315 PJ
Total Danish Renewable Energy production = 126 PJ
Total Danish energy consumption = 830 PJ
Total Danish electricity consumption = 121 PJ
Total energy import = 578 PJ
Total energy export = 1020 PJ

Energy Consumption of Average Danish Household
Electricity consumption per year = Approximately 15 GJ (4000 kWh)
Heat consumption per year = Approximately 60 GJ
Central Denmark Growth Forum

Central Denmark Growth Forum is a partnership between municipalities, business organisations, the labour market parties, educational and research institutions, and the region.

The main tasks of Central Denmark Growth Forum are:

• Monitoring the development in the region and
• Framing the strategy and actions plans for how to work for growth and development in Central Denmark Region

For further information about Central Denmark Growth Forum, the business development strategy, initiatives etc., please visit www.rm.dk.