

1. Study background, objectives and approach

Study background

In its *Business Promotion in Denmark 2020-2023* strategy, the Danish Board of Business Development (DBBD) identified 11 sector strongholds, characterised by their international competitiveness, best in class companies and knowledge environments, and large contribution to the Danish economy. The 11 sector strongholds are:

- Environmental technology
- Energy technology
- Food and bio resources
- Maritime industry and logistics
- Life science and welfare technology
- Construction and building
- Design, fashion and furniture
- Advanced production
- Digital technologies
- Finances and financial technology (Fintech)
- Tourism

The DBBD also identified two emerging industries – robot and drone technology and animation, games and film – which have a high potential for growth and commercial success. The Minister for the Ministry of Higher Education and Science identified two further emerging industries – defence, space and security and sound technology.

A priority for the Danish government is to strengthen entrepreneurship and improve the performance of start-ups and scale-ups in these sector strongholds and emerging industries. There are many public entities and initiatives in Denmark that play a role in this area. These include the six regional business hubs, the plethora of publicly-supported business incubators and accelerators, and the variety of funds that boost start-ups and scale-ups' access to finance. Among the key players are the 14 national cluster organisations. Each organisation focuses on a specific sector stronghold or emerging industry, supporting co-operation between companies, knowledge and educational institutions, and public organisations. The tourism sector does not have an appointed national cluster organisation, whose functions are filled by a range of existing tourism development agencies and destination management organisations.

This study aims to support policy makers in identifying actions that can be promoted across the public support system to support start-ups and scale-ups in the sector strongholds and emerging industries, with

a particular focus on building the sectoral entrepreneurial ecosystems of three case study sector strongholds in Denmark – energy technology, food and bio resources and advanced production.

Study objectives

The project seeks to develop recommended actions for the national government, national cluster organisations and other public bodies at national and regional levels to support start-ups and scale-ups in specific sector strongholds drawing on international policy experiences in these sectors. As such, the project has the following objectives:

- Identify entrepreneurial ecosystem drivers and weak links for start-ups and scale-ups in selected sectoral entrepreneurial ecosystems in Denmark;
- Identify gaps in the policy measures and policy mechanisms used to support start-ups and scale-ups in selected Danish strongholds and emerging industries as compared with practice in these same sectors in other OECD countries, and the potential transferable of these international policy experiences to Denmark;
- Recommend generic, cross-sector, policy actions to be taken for start-ups and scale-ups in the Danish sector strongholds and emerging industries;
- Recommend tailored, sector-specific, policy actions that can be taken by the national government, national cluster organisations, regional business hubs and others in Denmark in specific sectors.

Study approach

Conceptual framework

The project focuses on entrepreneurial ecosystems at the sector level. It builds on the OECD's ongoing work on entrepreneurial ecosystems, which identifies a number of key dimensions along which the strength of ecosystems need to be assessed with respect to their ability to generate impactful start-ups and scale-ups. It also draws from the conceptual framework of the OECD's local emerging industries work stream, which examines opportunities for new industry path development at regional level, including a classification of potential path development avenues according to knowledge base, industry diversity and innovation system sophistication.

Method

The initial phases of this project involved the mapping of policies relevant to start-ups and scale-ups in Denmark based on a review of policy documentation and the generation of new data on start-up and scale-up activity by sector stronghold and emerging industry by DBA and Statistics Denmark with guidance from the OECD. In addition, the study involved in-depth stakeholder consultations in three sector strongholds in Denmark – advanced production, energy technology and food and bio resources. These case study sectors cover a range of different knowledge bases and modes of innovation, ensuring that a variety of challenges are considered and enabling lessons to be drawn for other sectors with similar knowledge bases and modes of innovation. Further desk research and online interviews were undertaken on policies to promote start-ups and scale-ups in the chosen case study sectors in OECD comparator countries with a view to identifying transferable policy lessons for Denmark.

Report structure

The report begins with a description of the barriers typically faced by start-ups and scale-ups internationally and a mapping of key policies to address these barriers in Denmark's sector strongholds and emerging industries. Further information is provided on start-up and scale-up activity in Denmark's sector strongholds and emerging industries, based on data produced by the Danish Business Authority and Statistics Denmark using guidelines from the OECD. The subsequent three chapters present the opportunities and barriers to start-up and scale-up activities in each of the selected case study sectors, along with key takeaways from international policy experiences and policy recommendations for the selected sectors. Finally, overall conclusions and policy recommendations for Denmark's sector strongholds and emerging industries are offered, including a discussion on the resources, incentives and instruments that can be promoted by the national government, national cluster organisations and other policy actors to support start-ups and scale-ups in the sector strongholds and emerging industries.



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