

## **Business development in the Nordic Clean Tech sector** - Challenges and opportunities on company and policy level

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# Actor oriented facilitation schemes - a structure for future development

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Nordic countries are innovation-leaders

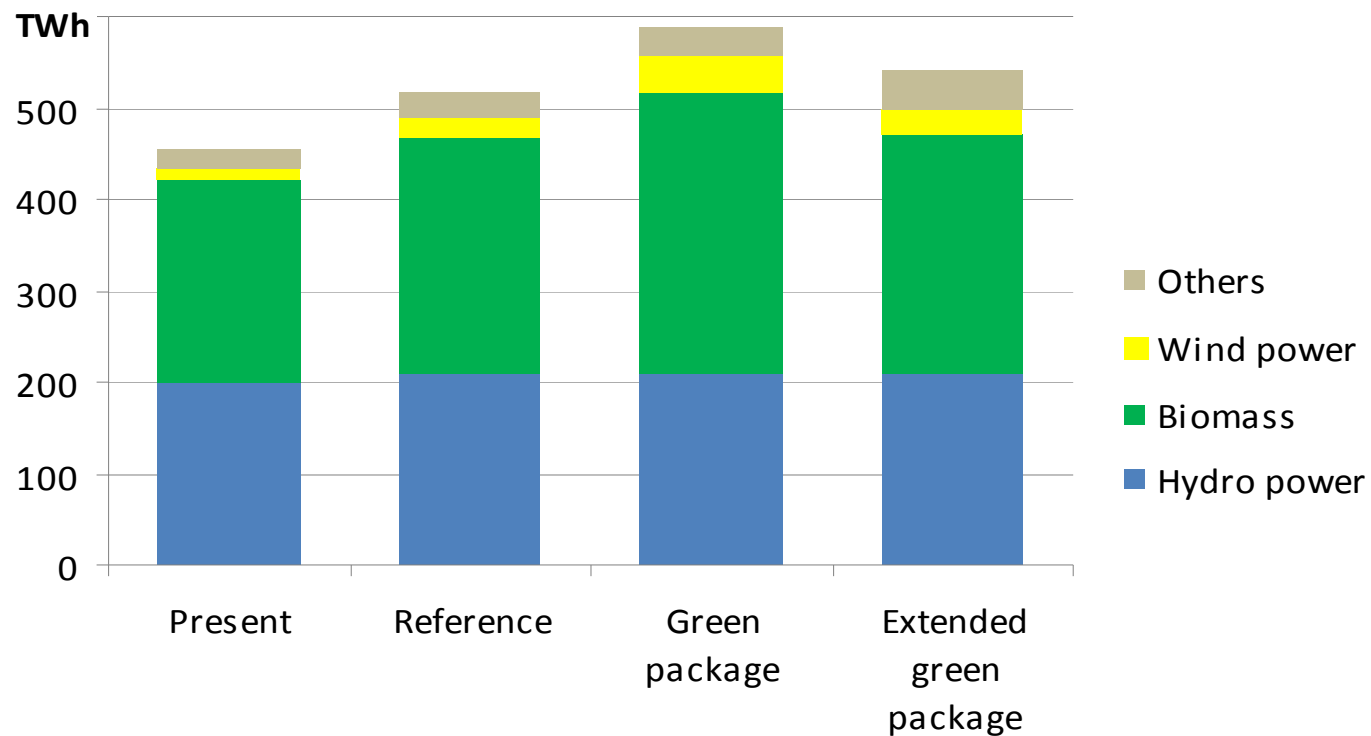
Large investments by *governments, industry and investors*

Commercialization and export are generally problematic

Purpose of the research is to identify:

- Core capabilities for increasing growth and export volumes in small and mature Clean-Tech companies
- Important competence areas for successful facilitation schemes

## Biomass have an important role to fill



*Renewable energy in the Nordic countries by the year 2023 in three different NEP scenarios, compared to the present use*

## Biomass Combustion Equipment Industry

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Manufacturers of industrial combustion plants and equipment for solid biofuels (1-50 MW<sub>t</sub>)

Sample includes six Swedish companies built around:

- Corporate specific technologies
- In-house manufacturing capabilities
- Significant export experience



# Characteristics of Biomass Combustion Equipment Industry

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- Sells 'one off' turnkey heat and CHP plants for dry and moist biomass
- Offers also individual components and service
- Typically only a couple of major deals per year
- Customers in *energy sector, pulp and paper, sawmills and industry*
- Manufacturing in own facilities, subsidiaries and subcontracting

## Economic characteristics

	Sales (MSEK) 2008	Employees 2008	Average ROA (%) 2008-2004	Equity ratio (%) 2008	Ownership/ Owner type/ Year of foundation
<b>Petrokraft AB</b>	132	47	2,6 %	60 %	Priv./family/1958
<b>Järforsen Energi System AB</b>	101	20	1,5 %	15 %	Priv./family/1985
<b>HOTAB Eldningsteknik AB</b>	75	44	6,4 %	19 %	Priv./family/1979
<b>Saxlund International AB</b>	54	23	2,1 %	58 %	Priv./Priv. Equ./1960
<b>TPS Termiska Processer AB</b>	68	63	-10,6 %	6 %	Priv./Priv. Equ./1970
<b>KMW Energi AB</b>	298	46	-5,7 %	13 %	Priv./Priv. Equ./1958
<b>Total/Average</b>	<b>728</b>	<b>243</b>	<b>-0,6 %</b>	<b>29 %</b>	

# Areas limiting growth and enhanced export orientation

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- Product development and sales process
- Competence profile and recruitment
- National and international collaboration



## Core capabilities for increasing growth and export volumes

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The results suggests that small and mature Clean-Tech companies needs support in:

- *Creating competitive advantage based on customer value*
- *Developing foreign sales capabilities*
- *Increasing value from stakeholder collaboration*



## The structure of Actor Oriented Facilitation Schemes

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Facilitator activities divided into three competence areas:

1. Business model development, management reorientation and implementing change processes.
2. Hands on support for building export capabilities driving companies to increased export volumes.
3. Develop value creating stakeholder collaborations and evaluating the facilitator initiatives/programs and schemes.

# Challenges for future action

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## Identify conceptual frameworks for

1. Fostering corporate change
2. Designing actor oriented facilitation schemes
3. Division of responsibilities and facilitator collaboration