

Finland's National Mobile Machine Growth Strategy is an industry-led effort aimed at advancing strategic growth priorities and supporting initiatives

How Finland's National Mobile Machine Growth Strategy 2035 was created



30+ organizations engaged through multiple strategy team meetings and interviews, contributing to the development and alignment of targets, strategic priorities, and initiatives



Finnish Mobile Machine industry survey (~130 respondents) conducted to gather broad perspectives and representation from industry stakeholders, including Finland's private sector, academia, and public institutions



Global experts engaged to develop industry fact base & analysis





Global mobile machine market and Finland's starting point



Finland's Mobile Machine Growth Strategy 2035



From vision to action

Existing products and services continue to be relevant – but ongoing disruptions create entirely new opportunities



Selected key disruptors that alter the mobile machine market

Macroeconomic shifts



Geopolitical instability



Sustainability & regulatory environment



Urbanization & population growth

New technologies



Electrification & alternative powertrains



Autonomy & robotics



Connectivity, AI & smart controls

New business models



Service-based business models

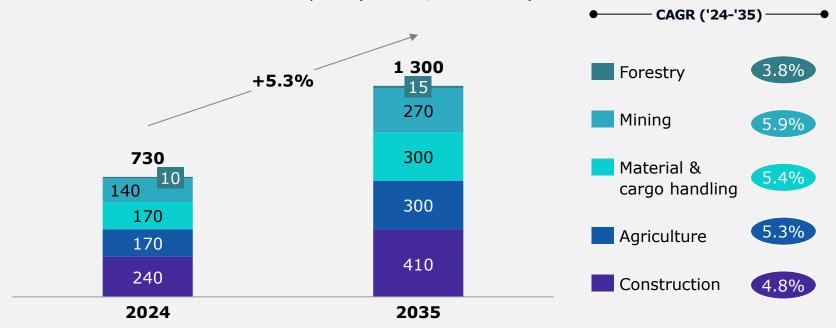
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These disruptors fuel growth; annual sales of mobile machines and parts is projected to reach around €1.3 trillion by 2035



Mobile machine market size & growth by sector

Annual sales of mobile machines and parts (€ billion, 2024-2035)



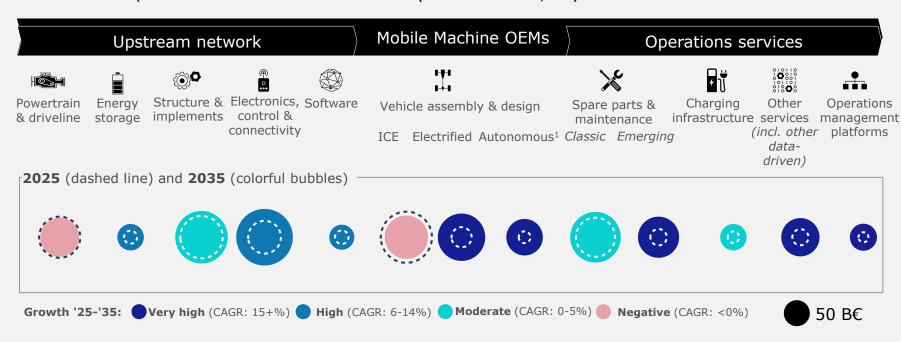
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Revenue shifting across the value chain; customer-driven and data-enabled solutions required to drive unique differentiation



Global revenue pools across value chain elements (2025 vs. 2035, B€)



New sources of customer value will emerge beyond machine itself – machines increasingly becoming 'enabling platforms'

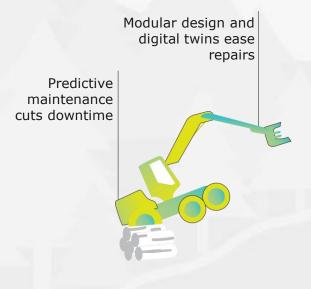


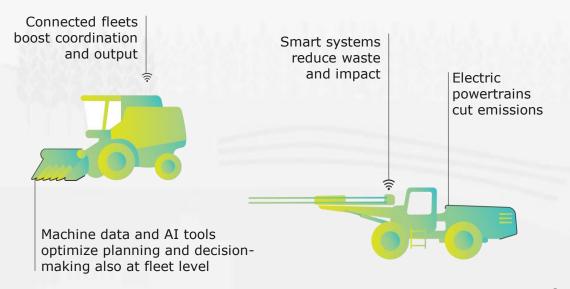
Lower lifecycle costs

Increased productivity

Safer, sustainable operations

Examples include:





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Today, the mobile machine industry is one of Finland's key industrial domains and a significant export contributor

€19B

Annual revenue

45,000

Employees

10%

of Finland's exports

Finland has extensive, end-to-end expertise across the full mobile machine value chain

Sample of companies operating in Finland across the value chain (non-exhaustive list)





Vision

Mighty Machines, Powered by Finland

We set the global standard for mobile machines and solutions with superior customer value – tripling industry revenue by 2035

Targets

Finnish mobile machine industry to strengthen leading positions

Triple the mobile machine industry revenue by 2035

~10% annual revenue growth

Add up to 45,000 new jobs

International talent key contributor

Finland recognized as a leading R&D player globally

Finland has 8 strategic growth priorities to drive the vision for 2035

Targets

Triple the industry revenue

Add up to ~45k jobs while improving productivity

Finland recognized as a leading R&D player globally

Strategic priorities



Positive spillovers beyond mobile machine industry

Automation & robotics

Data & AI

Battery & energy solutions

Electronics & semiconductors

Engineering & mfg services

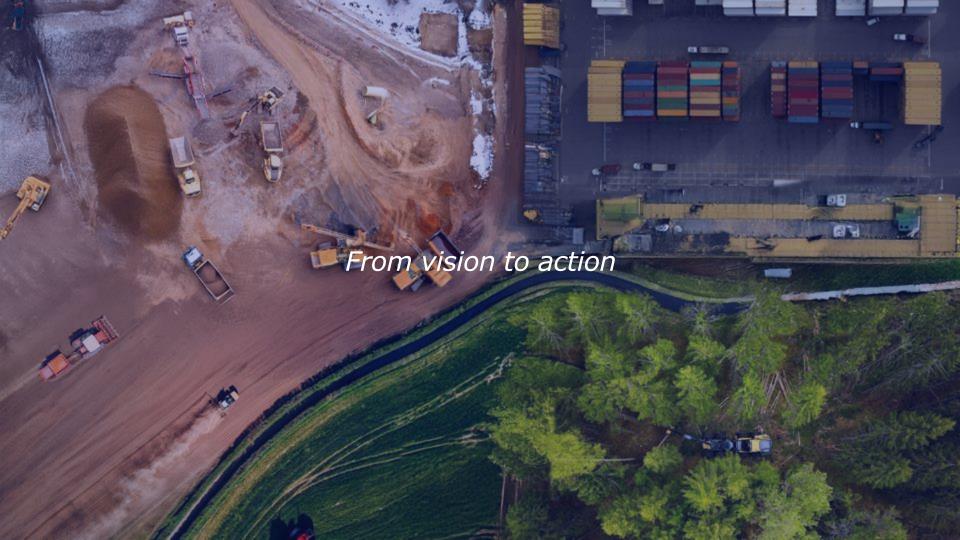
Each priority has a clear set of initiatives to drive it forward

Customer- centric value creation	Differentiated, high-impact solutions	Smart machines and operations	Sustainable solutions at scale	Seamless collaboration	6 Pro-business regime	7 Highly skilled workforce	Focused primary & applied research
Deepen integration into customer operations	Strengthen leadership in advanced offering	Utilize data for value-added E2E solutions	Build sustainability into product design	Develop and expand joint infrastructure	Streamline permitting, regulation, tax processes	Improve structural access to talent	Strengthen university specialization
Deliver lifecycle focused solutions	Promote Finland's mobile machine excellence	Develop machine- specific AI and operator integration	Develop next-gen, energy-efficient powertrains powertrains	Create efficient E2E research- product pathway	Incentivize investments in infrastructure	Make the industry attractive for top talent	Enforce strategic long-term research
Disrupt service models and expand customer base		Advance autonomy-enabled services & set standards	Embed circularity across the value chain	Strengthen intra- industry collab. & co-innovation	Ensure consistent innovation policy	Align education for industry needs	
Ensure best-in- class operator experience		Develop smart connectivity & utilize digital twins	Lead customers towards sustainable end operations	Strengthen cross- industry collaboration	Support startups throughout full growth journey	Expand training systems for continuous upskilling	
				Boost start-up and scale-up collab with incumbents	Promote Finland as a leading innovation hub		
				Strengthen EU & public-private collab	to distance and	N. Comment	

For each strategic priority, clear ownership has been defined for action-oriented initiatives

STRATEGIC PRIORITIES

Global leadership position					Enablers				
Customer- centric value creation	Differentiated, high-impact solutions	Smart machines and operations	Sustainable solutions at scale		Seamless collaboration	Pro-business regime	Highly skilled workforce	Focused primary & applied research	
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Example initiative	Action	AL AL AND	Samuel 1	Responsible	Example initiative	Action			Responsible
Disrupt service models and	use, uptime guaran support packages; S	Support customers ir ologies through align	า	<u>Industry,</u> Research	Strengthen research-	research process ar resourcing through also allowing smalle	g through collaboration platforms, Research		Associations, Research, Industry
expand customer base			<u>Industry,</u> Research	industry collaboration	Improve researchers' understanding of industry needs by presenting research outcomes in practical, accessible formats using concrete examples, and arranging joint events to enhance transparency and knowledge sharing between research and industry			<u>Research,</u> Industry	



Finland offers a reliable and business-friendly environment for the private sector to innovate, manufacture, and grow



Strong industrial base

Dense network of industry leaders, SMEs, and global OEMs enabling synergies and rapid co-development



Stable national operating environment

Globally ranked for transparency, rule of law, and low corruption



Cheap and clean energy

Reliable, low-cost, low-carbon energy with robust infrastructure



Skilled talent pool

Highly educated, cost-competitive workforce aligned to industry needs



Strong education system

World-class vocational and university education, top-ranked in student performance



Applied research

Strong applied research capabilities, especially in advanced tech and mobile machines



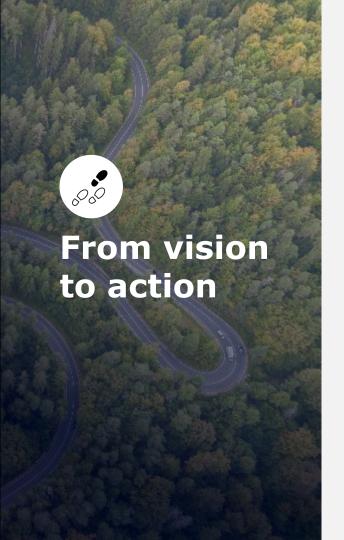
Effective industrial collaboration

Strong culture of academia-industry collaboration driving innovation



Access to funding

Broad access to EU and national funding to scale and commercialize innovation



~30 initiatives identified to drive the strategic priorities, each with specific actions and assigned responsibilities

The industry companies are committed, with stakeholder engagement ongoing and leadership by the SIX Mobile Work Machines group

Progress is now mobilized and monitored through events or reports, for example by Technology Industries of Finland



Now we mobilize and execute – with all stakeholders

SIX Mobile Work Machines cluster leads the work with companies, researchers, and public partners, building on earlier progress

First actions include building a Center of Excellence with VTT and universities, strengthening cooperation with partners such as the Semiconductor Group, and starting joint work to make better use of shared infrastructure

365-day plan with key stakeholders to kick off the strategy and guide implementation

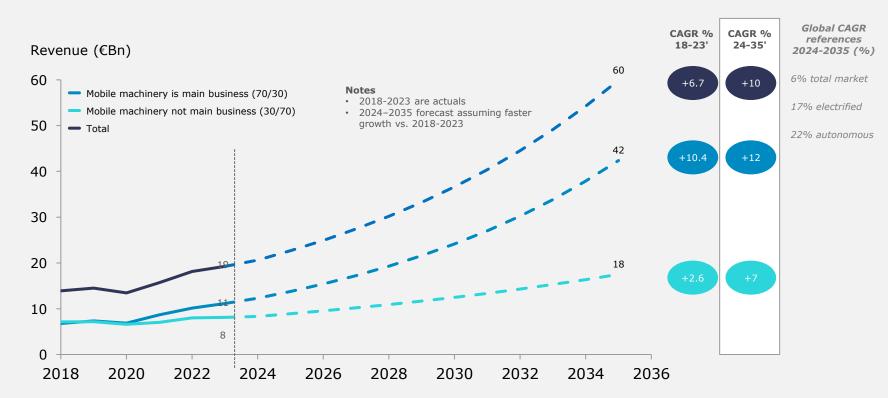
To find out more, download the report from teknologiateollisuus.fi or six.fi/mobile-work-machines

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~30 initiatives identified to drive the strategic priorities

	Global leadership position	Enablers
Customer- centric value creation	 Deepen integration into customer operations through co-creation and strategic partnerships. Deliver lifecycle-focused solutions that go beyond equipment to help customers succeed across their entire operations. Disrupt service models and expand customer base. Ensure a best-in-class operator experience. 	 Develop and expand joint infrastructure. Strengthen research-industry collaboration to create a seamless par from research to product. Strengthen intra-industry collaboration and promote co-innovation across the value chain. Build strategic inter-industry collaboration beyond the mobile machi industry. Boost start-up and scale-up collaboration with incumbents. Strengthen EU engagement and public collaboration to align with
Differentiated, high-impact solutions	 Strengthen leadership in advanced mobile machines by ensuring exceptional reliability, safety, and performance across environments. Ensure Finland's strong global reputation in the mobile machine industry continues to grow by actively promoting national strengths in specialized, high-performance machines. 	Pro-business regime Streamline permitting, regulatory, and tax processes to reduce friction for industrial growth. Incentivize investments in future-ready infrastructure to drive innovation and growth. Ensure consistent innovation policy across political terms to support long-term growth.
Smart machines and operations	 Leverage raw machine and site data by turning it into actionable insights, optimized operations, and value-added services. Develop machine-specific AI and human-machine integration. Advance autonomous machine operations and set new standards. Develop intelligent connectivity and digital twin technologies for 	 Strengthen startup and scale-up support across the full growth journey. Promote Finland as a leading hub for mobile machine companies and their suppliers' networks. Highly skilled workforce Improve structural access to talent by increasing employment flexibility and simplifying foreign recruitment processes.
Sustainable solutions at	predictive, adaptive, and autonomous systems Build sustainability into product design, manufacturing, and materials.	Increase the mobile machine industry's visibility and attractiveness new talent. Align education curricula with industry needs and strengthen academia-industry collaboration. Expand training systems to ensure continuous upskilling and workforce adaptability.
scale	 Lead the development of next-generation sustainable powertrains with a focus on energy efficiency. Embed circularity across all products and services throughout the value chain by adopting a systemic lifecycle approach. Lead customers towards more sustainable operations 	Focused primary & applied research - Strengthening research excellence through university specialization and focus on fewer but deeper areas. - Enforce long-term research strategies and funding models beyond short project cycles.

Growth ambition | Tripling 2035 industry revenue realistic; assumes 10% CAGR



Source: Business Finland; BCG analysis