DANISH CENTRE FOR STUDIES IN RESEARCH AND RESEARCH POLICY
DEPARTMENT OF POLITICAL SCIENCE
AARHUS UNIVERSITY

The Nordics as an R&I Region

Report from the Danish Centre for Studies in Research and Research Policy (CFA), Department of Political Science, Aarhus BSS, Aarhus University

Authors	Carter W. Bloch, Simon Fuglsang, Ebbe Krogh Graversen, Maria Theresa Norn
Department	Danish Centre for Studies in Research and Research Policy, Department of Political Science, Aarhus University
Year of publication	2026
Financial support	This report was commissioned by DFIR on behalf of the Danish Ministry of Higher Education and Science and funded by the Nordic Council of Ministers under the Danish Presidency 2026. CFA is responsible for the analysis and conclusions.

Contents

Summary **3**

1. Introduction **4**

2. Expert and stakeholder views on the Nordic R&I ecosystem **5**

Insights from the exploratory expert interviews 6
Insights from the first Delphi survey 7

3. Strategic pathways for the Nordic R&I ecosystem **12**

Input from the second Delphi survey 13
Insights from the concluding stakeholder interviews 15

4. Stakeholder informed principles for future Nordic R&I cooperation **17**

Concluding remarks 19

Methods, empirical evidence & data sources **20**

Interviewees 21
References for the desk research study 22

Summary

This report examines how the Nordic region can strengthen its position as an internationally competitive research and innovation (R&I) ecosystem. It focuses on the role of the joint Nordic R&I funding organisations under the Nordic Council of Ministers, explores where Nordic cooperation is perceived to create particular added value, and how it might evolve in response to changing political, technological and economic conditions. The analysis draws on desk research, a two-round Delphi survey involving Nordic R&I stakeholders, and interviews with experts and senior stakeholders across the Nordic research and innovation ecosystem.

The findings show broad support for the current Nordic model of research and innovation cooperation. Stakeholders consistently describe Nordic collaboration as trust-based, flexible and complementary to both national and European systems. The joint Nordic organisations are widely valued as facilitators of collaboration, networking and knowledge exchange with stakeholders perceiving these functions as important sources of Nordic added value despite relatively modest budgets.

At the same time, stakeholders see unrealised potential in the Nordic collaboration. Growing international uncertainty, technological competition, and increasing attention to resilience have led many stakeholders to ask whether stronger Nordic cooperation could contribute to strengthening productivity and competitiveness across the region. While there is broad agreement among respondents that Nordic cooperation should become more strategic, there is less agreement about what this could look like in practice. Most stakeholders surveyed favour strengthening coordination, strategic intelligence and alignment between Nordic, national and European initiatives rather than fundamentally redesigning the current institutional architecture.

The study develops three scenarios for Nordic cooperation: (1) strengthening the current decentralised and flexible collaboration model; (2) repositioning Nordic institutions as a coordination and strategic intelligence layer between national systems and the EU; and (3) giving Nordic cooperation a stronger political mandate for selective strategic leadership. While the first model, decentralized and flexible collaboration, is seen as both most desirable and feasible among the three models, respondents also express support for hybrid approaches that combine the current flexibility and bottom-up ownership with stronger coordination and selective strategic prioritisation in areas where Nordic cooperation is perceived to create clear added value.

Stakeholder perspectives point to a number of possible design principles Nordic institutions should remain selective, build on trust and low institutional barriers, strengthen their role as a bridge between national and European systems, maximise systemic leverage rather than funding volume, preserve national legitimacy, engage private foundations as partners rather than agenda-setters, and develop greater strategic coherence while retaining flexibility and responsiveness.

1. Introduction

Research and innovation (R&I) ecosystems play a vital role in fostering robust and competitive economies. Against a backdrop of growing international uncertainty, technological competition and the green and digital transitions, Nordic cooperation is increasingly expected to contribute to strengthening research and innovation, competitiveness, resilience and technological development across the region. Moreover, as highlighted by the Danish and Faroese Presidency of the Nordic Council of Ministers in 2026, the Nordic region is well positioned to play a leading role in advancing European research and innovation.

The analysis was initiated by the Danish Council for Research and Innovation Policy (DFIR) in connection with the Danish presidency of the Nordic Council of Ministers in 2026. Its overall purpose is to inform discussions on how the Nordic region can be further strengthened as an R&I region, by identifying where and under what conditions joint Nordic R&I initiatives create clear Nordic added value. The analysis also examines how Nordic R&I cooperation can evolve in a landscape characterised by increased international uncertainty, closer interaction with the European Union, and growing engagement from private foundations.

This report focuses on the role of joint Nordic research and innovation funding institutions within the Nordic R&I ecosystem, and explores the roles they could play in strengthening the Nordic region as a coherent and internationally competitive research and innovation region. The study was carried out by The Danish Centre for Studies in Research and Research Policy (CFA), Aarhus University.

The study is not an evaluation of the performance or effectiveness of the joint Nordic R&I institutions. Rather, it examines how Nordic R&I cooperation, and the role of the joint Nordic institutions in particular, are perceived by selected stakeholders and experts, and uses these perspectives to identify tensions, opportunities and possible directions for future Nordic cooperation. Accordingly, statements concerning the strengths, weaknesses or effectiveness of current arrangements should primarily be understood as stakeholder assessments rather than independent evaluations of institutional performance.

The analysis draws on desk research and qualitative data. Seven exploratory interviews with selected Nordic experts were undertaken to help frame the study and qualify initial findings from a desk research study of relevant literature. The desk research created an overview of relevant national, Nordic and European strategies and policy documents. The experts delivered opinions on the Nordic research and innovation ecosystem thereby guiding the analytical strategy for the analysis.

Building on this, a two-round Delphi survey was conducted among stakeholders in and around the joint Nordic R&I funding organisations under the Nordic Council of Ministers. 144 participants were invited to participate, with 52 completing the first round and 46 the second, and a small number of incomplete answers. The respondents surveyed are not intended to constitute a representative sample of all relevant stakeholders in Nordic research and innovation. Rather, the survey is intended to provide an overview of patterns in how this ecosystem is perceived among stakeholders and experts. Nevertheless, exploratory analyses of respondent subgroups (not reported) show broadly similar response patterns, suggesting that the findings are not driven by potential imbalances in the composition of the samples.

Finally, emerging findings and scenarios were discussed and validated through 14 follow-up interviews with key Nordic stakeholders, representing national R&I funders as well as the Nordic R&I funding institutions. These interviews were intended to further unfold the possible future directions of Nordic R&I and provide further nuances regarding the potential ways forward for the Nordics as an R&I region.

2. Expert and stakeholder views on the Nordic R&I ecosystem

This study focuses on the three most prominent joint Nordic research and innovation funding organisations under the Nordic Council of Ministers: NordForsk, Nordic Energy Research, and Nordic Innovation. Together, these organisations constitute the core public infrastructure for joint Nordic funding and cooperation in research and innovation. While each has a distinct mandate, they operate within the same broader Nordic R&I landscape and interact with national research and innovation funders across the Nordic countries. This section describes how these organisations are perceived by key stakeholders, with regards to their current and potential future roles in the Nordic R&I cooperative funding ecosystem.

The three organisations occupy different positions within the Nordic R&I landscape:

- **NordForsk** provides funding for and facilitates Nordic co-operation on research and research infrastructure.
- **Nordic Energy Research** facilitates intergovernmental cooperation, joint research, and knowledge building to address key energy-related societal challenges.
- **Nordic Innovation** promotes entrepreneurship, innovation and competitiveness in Nordic businesses to make the Nordics a pioneering region for sustainable growth.

Across the interviews, Delphi surveys and desk research, stakeholders generally viewed the three organisations as complementary, but also as operating under different conditions and facing different strategic challenges.

NordForsk was widely perceived as a well-functioning organisation that primarily acts as a coordinator and catalyst rather than as a strategic actor. Its activities are concentrated in the early stages of the research and innovation value chain (approximately TRL 1–4) and remain predominantly research-oriented.

Nordic Energy Research was generally described as a focused, mission-driven organisation with strong alignment with national energy agencies. Stakeholders highlighted its ability to support Nordic cooperation in areas where there are well-defined common interests and close links between research, policy and public authorities. Its activities are concentrated in the early to medium stages of the research and innovation value chain (approximately TRL 2–6).

Stakeholders expressed more diverse views regarding Nordic Innovation. While many felt that it plays important role in promoting Nordic innovation and business collaboration, several questioned the clarity of its mandate relative to national innovation agencies and European instruments. Some also pointed to weaker political anchoring and less clearly defined links to national innovation strategies compared with the other joint Nordic organisations. Its activities

are concentrated in the medium to end stages of the research and innovation value chain (approximately TRL 4–8).

A recurring theme across interviews was that the three organisations operate with relatively small secretariats and limited strategic capacity. While stakeholders generally described the current model as well-functioning in facilitating collaboration, they also argued that it provides limited scope for proactively identifying and responding to emerging strategic priorities. In light of recent international developments and growing attention to resilience, critical technologies and European competitiveness, some interviewees therefore suggested that a stronger strategic mandate – potentially accompanied by additional resources – may be required if the joint Nordic institutions are to play a more ambitious role in the future.

Insights from the exploratory expert interviews

The initial expert interviews revealed broad agreement on a number of characteristics of the Nordic research and innovation ecosystem, while also highlighting important differences in perspectives on how its future development should be approached. These interviews therefore served both to identify areas of consensus and to frame the key strategic questions explored in the subsequent Delphi study.

Across interviews, experts consistently described Nordic R&I cooperation as functioning better in practice than its relatively modest budgets and institutional structures might suggest. They emphasised that its strengths lie in high levels of trust, shared institutional cultures, geographical proximity and long-standing relationships, enabling extensive informal collaboration alongside formal funding mechanisms. Several interviewees described Nordic cooperation as a "middle layer" between national and European collaboration, where relatively limited public funding helps facilitate a much broader ecosystem of networks, partnerships and knowledge exchange. In fact, interviewees compared the institutions' roles to an iceberg with a visible funded layer, but a much larger volume of cooperation happening informally, culturally and historically "under the surface". This means that the research funding is expected to multiply the basic amounts from the Nordic Council of Ministers to the three institutions; approximately 100 mio DKK to NordForsk, 11 mio DKK to Nordic Energy Research and 63 mio DKK to Nordic Innovation in the 2025 budget.[1] Interviewees also broadly agreed that many of the challenges facing Nordic cooperation are structural rather than cultural. While the Nordic institutions were generally regarded as effective facilitators and coordinators, several respondents argued that their limited mandates, relatively small secretariats and constrained resources make it difficult for them to respond proactively to emerging strategic opportunities. Key risks identified by interviewees included a lack of ambition and fragmentation of activities within and across institutions.

At the same time, several interviewees described Nordic cooperation as generating value by facilitating networks and collaboration beyond what might be expected from the modest scale of its funding, despite fragmentation and limited visibility within the broader Nordic R&I ecosystem. According to the experts interviewed, this reflects the dominance of national funding logics and the limited authority of the Nordic institutions, both individually and collectively.

[1] https://pub.norden.org/politiknord2025-710/nordisk-ministerrads-ramme-for-2025.html.

However, some interviewees also emphasized a value chain logic when discussing where Nordic R&I cooperation creates added value. They generally saw a strong fit for cooperation in research and early-stage innovation, and an even stronger fit around shared infrastructure, test and demonstration facilities, and data. In contrast, several saw greater structural barriers to Nordic cooperation in later-stage, market-near innovation, where competition between firms and national interests tends to intensify. These perspectives were subsequently explored in the Delphi surveys.

Beyond these shared observations, however, interviewees expressed markedly different views on the future role of the joint Nordic institutions. Some argued that recent international developments, growing attention to critical technologies and increasing European investment create a window of opportunity for stronger Nordic strategic leadership and more explicit priority-setting. Others cautioned against expanding mandates or introducing stronger top-down governance, arguing that the comparative advantage of Nordic cooperation lies precisely in its flexibility, trust-based governance and bottom-up character. And finally, some respondents emphasised the importance of strengthening coordination rather than strategic steering, suggesting that the Nordic institutions should increasingly function as platforms for matchmaking, strategic intelligence and coordination between national systems and the European Union. These differing perspectives among key stakeholders indicate that the direction for Nordic R&I cooperation is a more central topic for debate than the overall purpose or contents of such cooperation.

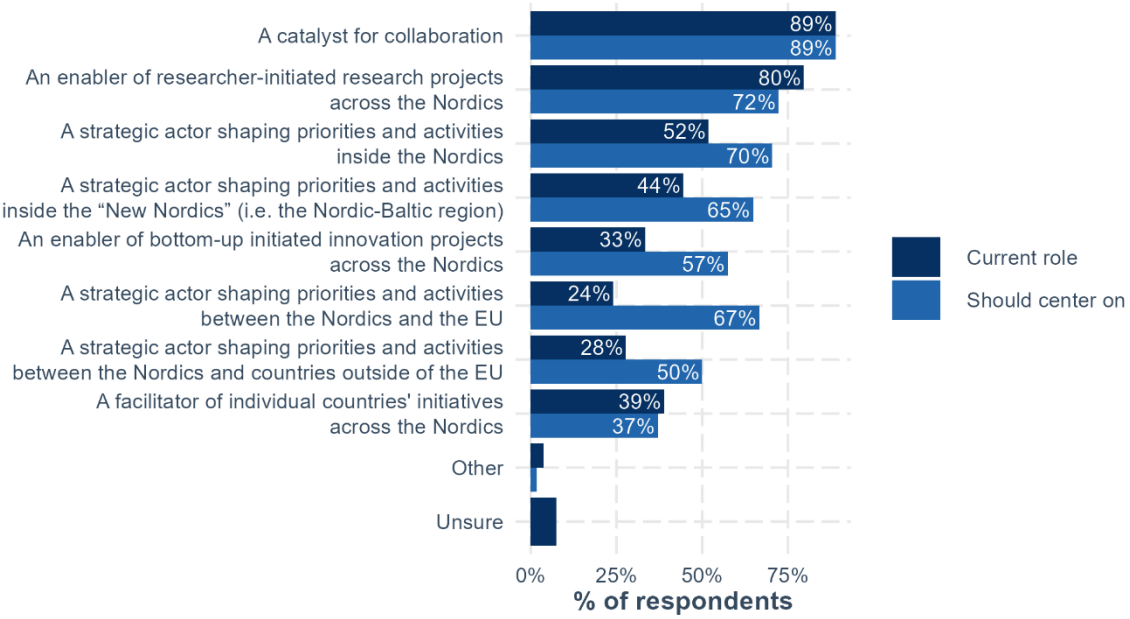
Recent focus on how private foundations can potentially augment publicly funded R&I and create synergies were also among the subjects in the interviews. The general position was positive but cautious acceptance of private foundations, seeing co-funding as a catalyst and not a substitute for public funding, and welcoming it if public Nordic priorities are defined first.

Taken together, the initial interviews suggest broad agreement on the value of Nordic cooperation, but considerably less agreement on how it should evolve. The most pronounced disagreements concerned not the overall value of Nordic cooperation, but how it should evolve and the institutional model through which future ambitions could best be achieved. These different perspectives provided the analytical foundation for the second stage of the study, including the Delphi process and the development of alternative scenarios for the future role of the joint Nordic R&I institutions.

Insights from the first Delphi survey

In the first-round Delphi survey, respondents largely confirmed the impressions from the initial interviews. As seen in figure 1, respondents generally perceived the three joint Nordic R&I funders as catalysts for collaboration and enablers of researcher-driven Nordic R&I cooperation. There was also close alignment between respondents' perceptions of the organisations' current role and their preferred future role in these areas. In contrast, respondents expressed a desire for the organisations to play a more active role in shaping strategic priorities, relative to how they were perceived to currently work, strengthening innovation, and coordinating Nordic engagement with the EU and other international partners than they believe is currently the case. Overall, the results suggest that while stakeholders view the organisations as effective facilitators of collaboration, large groups would prefer them to become more visible, proactive and strategically oriented.

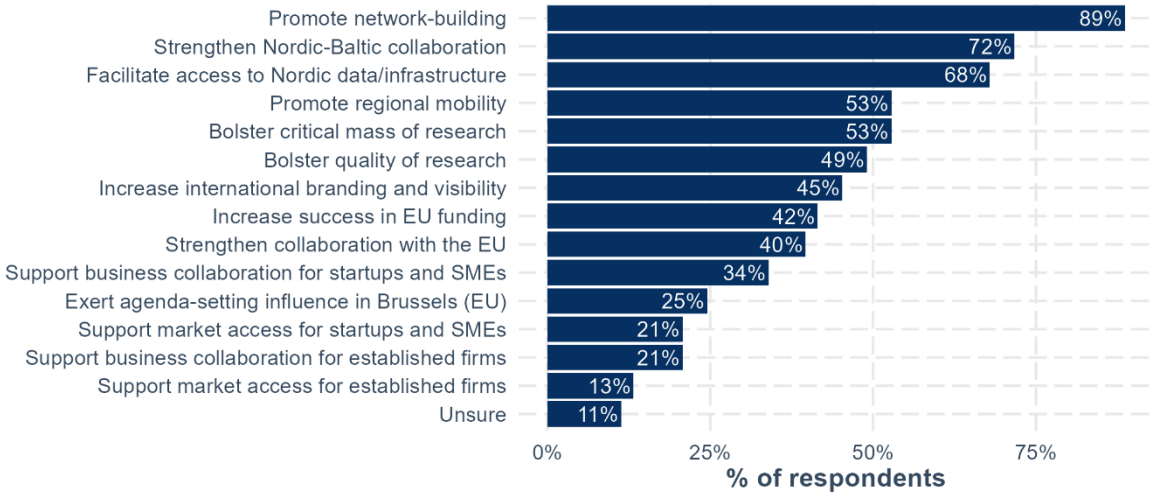
Figure 1. The roles of the joint Nordic R&I funders. Current and preferred roles



Notes: Results from the first round of the Delphi survey. n = 54. Respondents were asked first to pick as many as they wished as answers to "which of the following statements characterise the current role of the joint Nordic research and innovation funders?", and then "which of the following roles should the joint Nordic research and innovation funders centre on?"

Stakeholders' perceptions of Nordic added value broadly reinforce this picture, cf. figure 2. Respondents primarily associated the joint Nordic R&I funders with facilitating collaboration, strengthening networks and enabling access to Nordic data and research, test and demonstration infrastructure. This is consistent with the exploratory interviews, in which several experts emphasised matchmaking, network-building and access to shared infrastructure as important sources of Nordic added val. A lower but still considerable share indicates they create added value in other areas such as research quality, visibility, and collaboration with the EU. On the other end of the spectrum, only a small minority indicates that the joint Nordic R&I funders add value regarding collaboration and market access for SMEs and established firms. Taken together, the first Delphi survey's results indicate that stakeholders perceive the current Nordic R&I effort as adding value primarily through its role as a facilitator of cooperation and access, but that respondents less frequently associate current Nordic R&I efforts with more direct effects on research, innovation and market-oriented activities. The answers fit relatively well into the aforementioned value chain logic, where cooperation at the lower TR levels within research and related infrastructural access is more easily facilitated.

Figure 2. Perceived forms of Nordic **added value** that the joint Nordic R&I funders provide



Notes: Results from the first round of the Delphi survey. n = 53. Respondents were asked to pick as many as they wished as answers to "what are important forms of Nordic added value that the joint Nordic research and innovation funders can provide?"

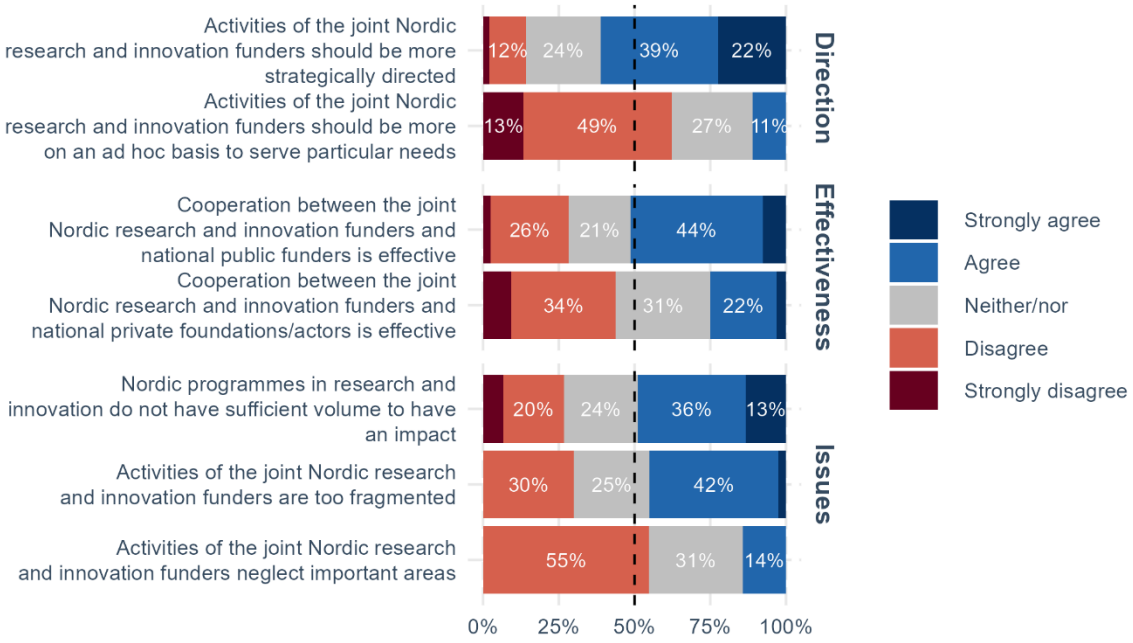
When asking Delphi participants whether Nordic R&I cooperation should be more ad-hoc or more directed, participants clearly agree more with the statement that cooperation should have greater strategic direction, as seen in the top panel of figure 3. More than half agree that activities should be more directed, while more than half disagree that activities should be more ad-hoc. This, however, does not necessarily reflect which form of activity that they want the most, as seen below, but that they feel that efforts should be *increased* more regarding strategic activities, than is the case for more ad-hoc activities.

When asked about the effectiveness of cooperations with national funders, middle panel figure 3, about half of the participants indicate that cooperation with public funders is effective, while only about a quarter agree that this is the case for private foundations. As such, there is also a widespread notion that Nordic R&I cooperation is better incorporated into public funding than private funding, however, this should not be taken to mean that participants necessarily want deeper cooperation with private foundations, as discussed further below.

Finally, participants were asked about three issues which were identified as areas of importance in the initial interviews, in the lower pane figure 3. These show that about half agree that Nordic R&I funding lacks sufficient volume for impact, that about the same proportion believe that Nordic cooperation is too fragmented; however more than half disagree that important areas are neglected. This once again highlights that there is less emphasis on neglect of specific topics of Nordic R&I collaboration, but that concerns are more clearly related to organisation of the collaboration.

Taken together, these responses indicate broad support for a stronger strategic orientation, combined with a perception among many respondents that the current Nordic model performs well in a facilitative role, but could benefit from greater coherence, clearer priorities and stronger political commitment. As such, these patterns align well with the conclusions based on the qualitative data.

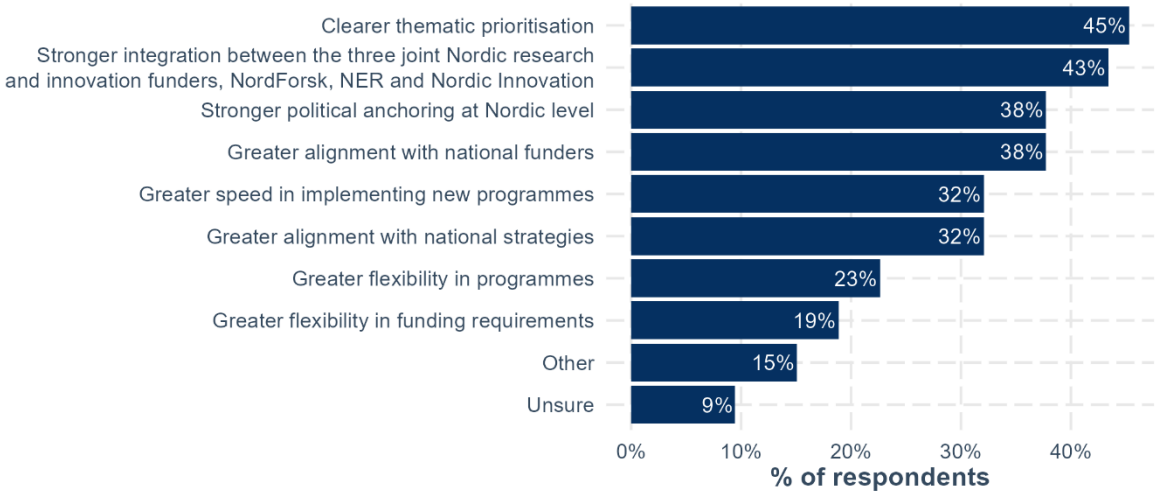
Figure 3. Agreement with statements about joint Nordic R&I cooperation



Notes: Results from the first round of the Delphi survey. n = 53. Statements regarding aspects of Nordic R&I cooperations rated on a five-point Likert scale. Unsure excluded from visualization.

When further asked about desirable strategic changes, respondents again favoured clearer strategic direction rather than fundamental institutional reform, as seen in figure 4. The most frequently selected priorities included stronger thematic prioritisation, closer coordination and integration between the Nordic institutions, stronger alignment with national priorities, and greater political commitment. In other words, respondents primarily called for a stronger strategic layer on top of the existing institutional architecture rather than replacing it altogether. However, it might also be noted

Figure 4. Support for different types of strategic shifts to the joint Nordic R&I funding system



Notes: Results from the first round of the Delphi survey. n = 53. Respondents were asked to pick as many as they wished as answers to "Which of the following strategic shifts among the joint Nordic research and innovation funders should be prioritised?"

that quite sizeable groups either said that they were unsure or added their own strategic shift under "other". Moreover, in contrast to above findings, no priorities manage to obtain majority support, further indicating how consensus around the need for direction does not translate into consensus on which direction should be taken.

The open-ended responses further reinforced these themes. As summarised in Table 1, respondents most frequently called for stronger political commitment, a shared Nordic strategic agenda, better alignment between Nordic and national priorities, improved coordination among Nordic funding organisations, and larger, longer-term funding initiatives. They also emphasised the importance of a stronger Nordic voice in Europe, clearer institutional roles, and greater visibility of Nordic cooperation.

Table 1. Most important changes required for a more strategically directed Nordic R&I cooperation (based on the first Delphi survey respondents' open comments; unprioritized list)

- Stronger political commitment from Nordic governments. Greater engagement and ownership from ministers and national governments to support common Nordic priorities and implementation.
- A shared Nordic strategic agenda. Joint priority-setting around key themes such as green transition, security, competitiveness, and societal resilience.
- Better alignment between Nordic and national priorities. Stronger links between Nordic initiatives and national funding strategies to ensure participation and impact.
- Greater coordination of funding mechanisms. Improved coordination among NordForsk, Nordic Innovation, Nordic Energy Research, and national funders.
- Larger and fewer initiatives. Pooling resources into larger, longer-term programmes instead of spreading funding across many small activities.
- A common Nordic funding model. Moving towards shared funding pools, mission-driven programmes, and longer-term financial commitments.
- Stronger engagement of national funding agencies. Ensuring national funders have dedicated resources and incentives to participate in Nordic cooperation.
- Clearer division of roles across Nordic institutions. Better positioning and complementarity between NordForsk, Nordic Innovation, and Nordic Energy Research.
- Stronger Nordic voice towards Europe. Coordinated Nordic agenda-setting and influence in Horizon Europe and broader EU policy processes.
- Improved communication, visibility, and ecosystem-building. Better communication of impact, stronger networks, and creation of innovation value chains from research to implementation.

Notes: Results from the first round of the Delphi survey.

Conversely, respondents identified fragmentation as the principal obstacle to stronger Nordic cooperation (Table 2). The most frequently cited barriers included fragmented national priorities and funding systems, insufficient political commitment, limited funding, institutional complexity, competing national and European priorities, and weak awareness of the added value created through Nordic collaboration.

Table 2. Most important barriers to stronger Nordic R&I cooperation (based on the first Delphi survey respondents' open comments; unprioritised list)

- Fragmentation of national priorities and funding systems. Different national agendas make it difficult to establish truly joint Nordic programmes and investments.
- Insufficient political commitment. Lack of sustained political attention and willingness to invest strategically in Nordic cooperation.
- Lack of a common governance and funding model. National interests often override collective Nordic priorities.
- Limited funding and resources. Inadequate funding levels and staff capacity constrain collaboration and scaling of successful initiatives.
- Difficulty mobilizing all countries and funders. Uneven engagement from national funders creates gaps in participation and continuity.
- Too many actors and institutional complexity. A fragmented institutional landscape reduces efficiency and impact.
- Different regulations, requirements, and reporting systems. Administrative differences create barriers to cross-border collaboration.
- Competition from national and EU priorities. Nordic cooperation is often secondary to national programmes and EU opportunities.
- Weak awareness of Nordic added value. Policymakers, funders, and researchers do not always recognize the benefits of Nordic collaboration.
- Gaps between R&I systems. Insufficient connection between research, applied research, commercialization, and business needs limits impact.

Notes: Results from the first round of the Delphi survey.

Overall, the first Delphi survey paints a consistent picture. Stakeholders consider the current Nordic R&I system to be valuable and broadly effective as a facilitator of collaboration, but they also perceive considerable untapped potential. The survey points towards stronger political commitment, clearer strategic priorities, improved coordination and more integrated funding mechanisms as most important for strengthening the Nordic research and innovation ecosystem. At the same time, the diversity of responses suggests that there is less agreement on how these ambitions should be realised institutionally.

3. Strategic pathways for the Nordic R&I ecosystem

The findings from initial exploratory interviews and the first Delphi survey thus indicate broad stakeholder support for Nordic R&I cooperation and for its current emphasis on coordination, networking and facilitation. At the same time, stakeholders expressed different views on how Nordic cooperation could and should evolve in response to changing political, technological and funding landscapes. Rather than pointing towards a single path forward, the findings reveal an opportunity space for the future development of Nordic R&I cooperation.

Based on this first phase of the study, three scenarios representing alternative strategic pathways for the joint Nordic R&I institutions were developed. The scenarios are not intended to be mutually exclusive; rather, they capture different governance logics and strategic priorities, recognising that future developments may combine elements of all three.

Table 3. Three strategic scenarios for future Nordic R&I cooperation

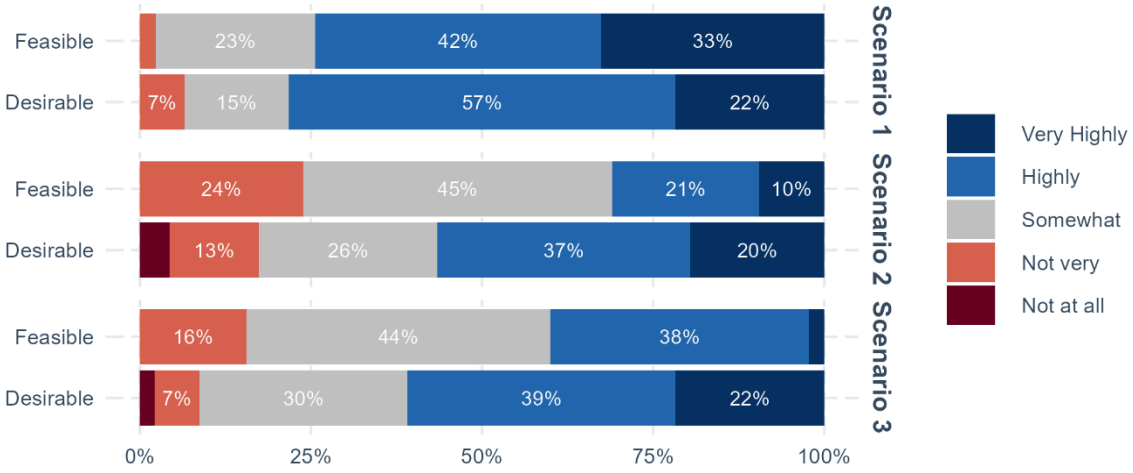
Scenario 1. Decentralised and flexible Nordic collaboration Nordic cooperation largely continues in its current form, emphasising bottom-up, researcher- and stakeholder-driven collaboration rather than major institutional reform. The model preserves the decentralised, flexible and trust-based character of the current system while strengthening existing instruments such as collaborative calls, mobility schemes and networking, supported by clearer mandates and more stable funding.
Scenario 2. Nordic coordination and EU alignment Nordic cooperation is repositioned as a strategic coordination layer between national systems and the European Union. Rather than focusing primarily on grant funding, the joint Nordic institutions strengthen networking, strategic intelligence, matchmaking and coordination ahead of EU initiatives and negotiations, particularly in selected priority areas.
Scenario 3. Catalyst for strategic Nordic leadership Nordic cooperation is given a stronger strategic mandate and clearer political backing to coordinate long-term Nordic priorities. The joint Nordic institutions take a more proactive role in developing programmes across the research and innovation value chain in selected areas of Nordic strategic importance, supported by stronger political steering and longer-term planning.

Input from the second Delphi survey

The three strategic scenarios were evaluated in the second Delphi survey and subsequently discussed in the final round of stakeholder interviews. When respondents were asked to select only one preferred model, 47% chose Scenario 1, 36% Scenario 3 and 17% Scenario 2. Similarly, when asked about their perceptions of each scenario specifically, which was done before they were asked which model they preferred, scenario 1 was the most highly rated overall, but closely followed by scenario 2 and 3 with regards to desirability. However, there are sizeable differences when it comes to the perceived feasibility of the scenarios. While a large majority sees scenario 1 as feasible, this is clearly not the case for scenarios 2 and 3. This lack of belief that these futures for Nordic R&I cooperation are feasible, though desirable, adds another layer to the fragmentation in visions for the future of Nordic R&I, in that not only do stakeholders disagree about the specifics of organisations changes; many also remain sceptical regarding the feasibility of such developments.

Taken together, the responses suggest that alongside consensus on the desirability of existing missions, many stakeholders see different desirable combinations of characteristics across scenarios. This was also further supported in open answers and further expert interviews, in which many participants expressed support for combining elements from several scenarios.

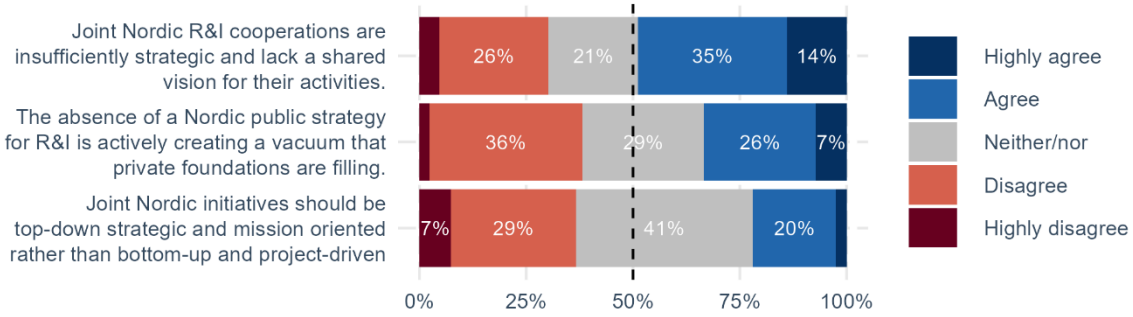
Figure 5. Perceived desirability and feasibility of the three strategic scenarios



Notes: Results from the second round of the Delphi survey. n = 47. Respondents were asked to rate each of the three scenarios, see table 3. Ratings on 5-point scales for feasibility and desirability. Unsure excluded from visualization.

Following up on findings from the first Delphi survey, participants were asked directly about their perceptions of whether R&I cooperation is sufficiently strategic, whether private foundations are filling the vacuum left by lack strategy, and to choose between top-down or bottom-up approaches. About half of the participants agreed that joint Nordic R&I cooperation is insufficiently strategic and lacks a shared vision for its activities. At the same time, a substantial minority disagreed, underlining the lack of consensus on the need for stronger strategic direction.

Figure 6. Agreement with statements regarding the future development of Nordic R&I cooperation



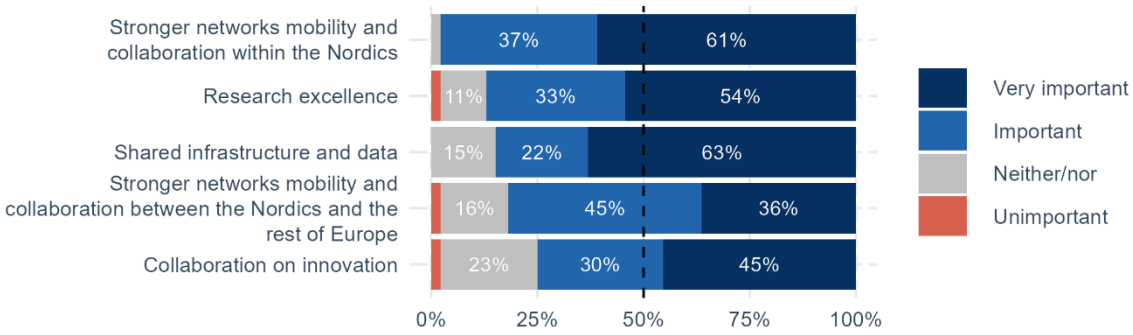
Notes: Results from the second round of the Delphi survey. n = 47. Participants rated statements on 5-point Likert scales. Unsure excluded from visualization.

The stakeholders are split regarding whether they feel that private foundations are filling up a gap left by a lack of a public Nordic R&I strategy. This mirrors the disagreement among interviewees regarding the role of private foundations, and the potential issues or benefits of this. Finally, when asked directly whether participants would prefer a more top-down and strategic approach, there is

also a high degree of disagreement, again highlighting lack of consensus around the specific direction of future Nordic R&I cooperations.

Respondents continued to express strong support for the traditional strengths of Nordic cooperation when asked directly to rate the importance of the areas that Nordic R&I collaboration is perceived to affect. These are: facilitating collaboration, creating Nordic added value, and supporting trust-based networks and partnerships (Figure 7). These findings reaffirm that respondents attribute considerable value to Nordic R&I collaboration, particularly where it builds on its existing strengths in collaboration, networks and trust.

Figure 7. Perceived importance of different effects of Nordic R&I cooperation



Notes: Results from the second round of the Delphi survey. n = 46. Participants rated statements on 5-point Likert scales. Unsure excluded from visualization. No participants answered "very unimportant".

Insights from the concluding stakeholder interviews

The three scenarios, together with the findings from the first Delphi survey, were discussed in a final round of interviews with key Nordic stakeholders. Although interviewees approached the questions from different institutional perspectives, a common pattern emerged. Few supported any of the three scenarios in isolation. Instead, most favoured a hybrid approach that combines the flexibility and bottom-up ownership of Scenario 1, the coordination and intelligence functions of Scenario 2, and a limited degree of strategic prioritisation from Scenario 3.

A recurring theme across the interviews was that Nordic cooperation derives much of its strength from shared values, mutual trust, institutional similarities and long-standing relationships. These characteristics were widely seen as the foundation of Nordic collaboration and as an important comparative advantage compared with both national and European cooperation. Consequently, many interviewees argued that future reforms should build on these strengths rather than replace them with more formalised governance structures.

Beyond this broad consensus, however, interviewees expressed markedly different views regarding the future role of the joint Nordic institutions. Some informants (often with connection to national research councils) see bottom-up research collaboration as a core contribution of Nordic collaboration and thus support a Scenario 1-type model that encourages programs for collaborative research projects determined by researchers themselves (either open or within broad themes). They emphasize researcher autonomy, national ownership, flexibility, voluntary

participation and bottom-up priority formation. From this perspective, Nordic cooperation should remain selective, supporting collaboration where there is genuine Nordic added value, based on the argument that Nordic R&I cooperation should choose where it is most logical to cooperate rather than being forced into second-best shared priorities with forced cooperation demands.

Others emphasised the importance of stronger ecosystem coordination. The support for scenario 2, mostly among stakeholders from funding organisations, emphasize ecosystem and bridgebuilding, coalition formation and Horizon Europe preparation. These respondents viewed the Nordic institutions primarily as platforms for connecting actors, coordinating initiatives and strengthening Nordic positioning within Europe. They highlighted functions such as strategic intelligence, matchmaking, coalition building and coordination ahead of European funding initiatives as important areas for further development. This group of respondents proposed, for example, using the Nordics as a testing ground within new technologies, achieving a critical mass that some argued was necessary to compete (particularly within new, critical technologies), and uniting to gain more influence in promoting shared interests. The new EU Competitiveness Fund, ECF, was highlighted specifically by more than one informant, given that it is a new and very large fund that will be an important part of EU R&I policy, and the Nordics should work together and be strategic in how to capitalise on this.

A third, smaller group showed support for scenario 3, arguing that the current Nordic system is too fragmented and insufficiently ambitious to respond to an increasingly competitive and internationally uncertain environment. These interviewees favoured a stronger political mandate, clearer strategic priorities and closer coordination across the Nordic institutions, particularly in areas such as critical technologies, resilience and security.

While most supported both to a certain extent, there seems to be a perceived trade-off between bottom-up models and strategic priorities, i.e. the challenge to become more strategic without becoming rigid. At the same time, respondents stated that the Nordic countries want Nordic impact but remain reluctant to surrender control over priorities and funding.

Taken together, these perspectives suggest that the central debate is not whether Nordic cooperation should become more strategic, but rather what "more strategic" should mean in practice. While many respondents called for stronger strategic direction, they attached different meanings to the concept. For some, strategic cooperation meant stronger political prioritisation of selected thematic areas such as quantum technologies, artificial intelligence, defence or critical raw materials. Others associated strategy with greater flexibility and responsiveness, enabling the Nordic system to adapt more quickly to emerging opportunities. A third interpretation emphasised continuity through predictable funding programmes, recurring calls and long-term capacity building. These different understandings illustrate that strategy concerns not only priorities, but also the governance model through which Nordic cooperation is organised.

At the same time, there was widespread agreement among the respondents that flexibility and agility are needed, and some noted that current decision-making processes are too slow. However, suggestions for how this can be achieved diverged greatly. Some argued that greater consolidation, stronger political anchoring and a clearer mandate would improve ability to act, react and change directions. Others argued essentially the opposite, namely that the current decentralized setup is more flexible and agile, making it easier to propose and implement new initiatives. Having said this, there still appears to be wide agreement that some degree of flexibility and room for bottom-up initiatives (as represented by scenario 1) is needed.

Another recurring theme concerned the relationship between research and innovation. While respondents generally agreed that Nordic research collaboration is well established, opinions differed regarding the role of Nordic cooperation in innovation. Some argued that innovation is inherently more difficult to organise across Nordic boundaries, while others saw the research-to-innovation interface as the greatest untapped opportunity for Nordic cooperation. In particular, several interviewees pointed to increasing international competition, technological sovereignty and industrial competitiveness as arguments for strengthening Nordic collaboration across the entire research and innovation value chain. Some respondents therefore called for more strategic and coordinated support for innovation and for start-ups. Technological sovereignty could be seen as an underlying driver, in that the increased need for innovation (as for research) requires more coordinated and strategic efforts across the value chain than is currently the case.

This discussion also shaped views on European cooperation. Many respondents supported stronger Nordic coordination in relation to the European Union, particularly where joint action could improve Nordic influence, facilitate participation in European partnerships or help position Nordic actors in emerging initiatives such as the European Competitiveness Fund. At the same time, relatively few advocated for creating a formal Nordic intermediary between the member states and the EU. Instead, most envisaged the Nordic institutions acting as coordinators, conveners and strategic facilitators rather than representatives of a common Nordic position.

Interviewees were likewise broadly positive towards greater involvement of private foundations. Such partnerships were seen as an opportunity to increase scale, leverage additional resources and support larger Nordic initiatives. However, respondents consistently emphasised that private foundations should complement rather than define Nordic priorities. Maintaining public ownership of strategic priorities and ensuring transparent governance were viewed as essential conditions for stronger public-private cooperation.

Finally, several interviewees raised questions regarding the organisation of the Nordic institutional landscape itself. While a few suggested merging the three joint Nordic institutions to improve coherence and critical mass, most favoured maintaining separate organisations with clearer mandates, stronger coordination and more complementary roles. Across interviews, many respondents regarded the current institutional model as providing a solid foundation, but that its future success will depend on its ability to combine the trust-based strengths of Nordic cooperation with greater strategic coherence and responsiveness to a rapidly changing international environment.

4. Stakeholder informed principles for future Nordic R&I cooperation

Although the study identifies a broad opportunity space for strengthening Nordic R&I cooperation, it also highlights diverging opinions regarding the feasibility and desirability of the many directions such cooperation might take. The findings presented here should therefore be seen not as definitive answers, but as a contribution to the ongoing discussion on the future development of the Nordic R&I ecosystem.

The findings can be distilled into a set of stakeholder-informed principles for how the joint Nordic R&I funding institutions might evolve. These principles are derived from the empirical material

and reflect the views expressed by stakeholders and experts across the Nordic R&I ecosystem. As such, they should not be understood as an evaluation-derived set of recommendations, but as a synthesis of recurring perspectives across the empirical material. Implicitly, many of these principles take into account barriers identified above in Table 2, particularly concerning fragmentation, lack of broad political commitment and navigating institutional complexity, by highlighting selectiveness and targeted approaches that can be more effectively agreed upon and implemented.

Table 4. Stakeholder informed principles for the development of future joint Nordic R&I funding

- *Be selective by design, not comprehensive by default.* Focus on areas where there is a clear rationale for Nordic and where stakeholders identify distinct Nordic added value rather than attempting to cover the entire R&I ecosystem.
- *Operate as a bridge between national systems and the EU.* Position the Nordic institutions as a complementary coordination layer rather than as competitors to either national or European funding systems.
- *Maximise systemic leverage rather than funding volume.* Prioritise coordination, strategic intelligence, matchmaking and trust-building to complement the relatively modest scale of Nordic funding.
- *Build on trust and low institutional barriers.* Preserve the accessibility, flexibility and trust that characterise Nordic cooperation rather than replacing them with more complex governance structures.
- *Concentrate where Nordic cooperation is structurally strongest.* Continue to prioritise research collaboration, shared infrastructures and knowledge development, while strengthening links further along the research and innovation value chain where appropriate.
- *Use mission-oriented approaches selectively.* Launch Nordic mission-oriented initiatives only where there are clearly shared challenges, complementary national capabilities and explicit political backing.
- *Clarify strategic and operational roles.* Distinguish clearly between priority-setting, funding and implementation responsibilities.
- *Preserve national legitimacy.* Design Nordic funding mechanisms that maintain national ownership while enabling effective cross-border collaboration.
- *Engage private foundations as partners, not agenda-setters.* Encourage public-private partnerships while ensuring that public priorities continue to guide Nordic cooperation.
- *Treat the Nordic region as a trusted space in a changing world.* Build on Nordic cooperation as a trusted platform for collaboration in an era of international uncertainty, dual-use technologies and increasing research security concerns.
- *Prioritise learning over visibility:* Strengthen the Nordic institutions' capacity to generate shared learning, while communicating more clearly the value and impact of Nordic cooperation.

The principles presented above are intended as a synthesis of the empirical findings rather than as prescriptive recommendations. They reflect the areas where broad patterns emerged across interviews and surveys while recognising that stakeholders also expressed differing views on several important questions. Other opinions raised by smaller groups of respondents included merging the joint Nordic institutions, adopting a much stronger mission-oriented approach, significantly increasing funding levels, and further strengthening flexibility and decentralisation. Although these proposals received more limited support, they illustrate the diversity of perspectives regarding funding and organisation of the future Nordic R&I cooperation.

Concluding remarks

The evidence presented in this report shows broad stakeholder support for Nordic research and innovation cooperation, alongside considerable debate about how it can and should evolve. The analysis contributes to a stronger evidence base for understanding the Nordic region as a research and innovation ecosystem that complements both national systems and European collaboration.

The findings provide the Nordic Council of Ministers, the joint Nordic R&I funding organisations, national authorities and private foundations with insights into how key stakeholder envision that Nordic cooperation can become more coherent, strategically coordinated and impactful. They offer a stronger basis for discussions about joint Nordic initiatives, coordination across funding organisations, and the areas in which stakeholder perceive Nordic cooperation to offer particular added value. Many stakeholders perceive recent international developments as creating renewed momentum – and potentially a window of opportunity – for stronger Nordic R&I cooperation. Overall, the analysis points to a Nordic R&I ecosystem that stakeholders generally value, particularly for its ability to facilitate collaboration, networks and trust-based cooperation. At the same time, stakeholders identify considerable unrealised potential for strengthening its complementary role: bringing together research, innovation, industry, research infrastructures, private foundations and European opportunities within a more coherent and strategically coordinated Nordic ecosystem.

Methods, empirical evidence & data sources

The empirical material is designed to map and analyse stakeholder perspectives rather than to evaluate institutional performance or establish the effects of Nordic R&I cooperation.

Methodologically, a small desk research study, selected qualitative interviews and a two-round Delphi-inspired study were used to enable a systematic involvement of selected key Nordic stakeholders and securing the quality of results found. The interviewees and survey participants were selected to represent national as well as Nordic representative from the R&I ecosystem.

The desk research created an overview of the existing division of labour between Nordic, national and European stakeholders as well as relevant national, Nordic and European strategies and policy documents, e.g. Draghi (2024a, 2024b), Mattsson (2026), NordForsk (2019, 2025), Nordic Council of Ministers and Nordic Counsil (2018). Together with recent hands-on reports and documents it structured the initial analytical strategy and demand for data collection, i.e. the interview guides and Delphi survey, see e.g. Liimatainen (2023), NordForsk (2024), Stafström (2024), Ørskov (2024).

Seven semi-structured interviews were initially conducted with selected key experts or stakeholders in the Nordic R&I ecosystem, shedding light on practices, experiences and assessments of the existing division of labour, potential for strengthened collaboration and identified barriers and tensions. Their input secured a wide and comprehensive coverage in the analytical strategy. The seven experts were selected by CFA, see next subsection. They represent experts io the Nordic research and innovation ecosystem, and are not members of or close contacts to the three Nordic R&I funders. Parallel, the Delphi-inspired process was carried as two online surveys. The first survey focused on an exploratory mapping of assessments, experiences and perspectives on Nordic added value, division of labour and cooperation potential. The second survey, focused on qualifying, prioritising and taking a position on synthesised theses and strategic possibilities. Both surveys were distributed to 144 invited stakeholders from the Nordic countries' R&I ecosystem. The selection criteria for the invitees were twofold. Each of the three core Nordic research and innovation organisations suggested up to 25 respondents each. Parallelly, CFA collected expert and stakeholder names on influential contributions in, about or on Nordic R&I funding issues. The principle was that the collection should enable the identification of shared priorities and make disagreements and alternative perspectives visible. If identified or suggested respondents were among the interviewees, they were omitted from the Delphi surveys.

For each round a first invitation to participate was followed by two reminders. The first round received 52 (35%) complete responses, the second round received 46 (32%) complete responses. Each round additionally received a small number of incomplete answers. The sample was characterized by good geographical coverage, with the four largest countries, Denmark (Delphi1 17%, Delphi 2 22%). Finland (17%, 13%), Norway (26%,20%) and Sweden (15%, 24%) being most well-represented. In the first Delphi round, which focused explicitly on the three core Nordic research and innovation organisations, we asked participants about their knowledge of these. While knowledge was clearly highest for NordForsk (low 15%, medium 45%, high 40%), the sample also included meaningful proportions that had knowledge of Nordic Innovation (low38 %, medium 45%, high 17%), and Nordic Energy Research (low 52%, medium 26%, high 22%). Running analyses for subsamples with different levels of familiarity of the Nordic research and

innovation organisations, show highly similar patterns across subgroups, indicating a significant degree of consensus on the questions asked of Delphi participants.

Finally, 14 semi-structured interviews were conducted with key stakeholders in the Nordic R&I ecosystem, including representatives of co-Nordic institutions, national funding players and other stakeholders. The interviews contribute to a more in-depth qualification, taking a position and validating results and insight found in the Delphi study. The 14 experts were selected by CFA to represent key stakeholders in innovation, research and Nordic R&I funding institutions, see next subsection. They are key players in the Nordic R&I and include representatives for the three Nordic R&I funding institutions (CEOs and chairmen), and representatives for the national funding bodies, (research and innovation councils). Unfortunately, no private funder representants agreed to participate.

The results of the interview study are based on a thematic analysis that combines both deductive and inductive elements, i.e. based on DFIR's aim to identify prerequisites for a strengthened Nordic R&I region and on themes identified in the desk research study. The analysis has also been open to new insights and patterns that arise in the interaction with the empirical material. In parts of the analysis, a data-protected version of Microsoft's GAI Copilot was used to clean and condense the interviews conducted. Aarhus University's agreement on this ensures that Copilot neither stores nor trains on the interview data.

Interviewees

Table A.1 Participants in the explorative interviews

Name	Organisation	Country
Joakim Appelquist	Royal Swedish Academy of Engineering Sciences	Sweden
Erik Arnold	Technopolis	Norway/UK
Søren Nedergaard (informal)	Novo Nordisk Fonden & DFIR	Denmark
Christopher Palmberg	Business Finland	Finland
Ólöf Vigdís Ragnarsdottir	RU, Reykjavik University	Iceland
Espen Solberg	Norwegian Ministry of Education and Research	Norway
Saara Vihko	Ministry of Education and Culture, Department for Higher Education and Science Policy	Finland

Table A.2 Participants in the stakeholder interviews

Name	Organisation	Country
Heike Aura	Finnish Innovation Fund Sitra	Finland
Katarina Bjelke	RCS	Sweden
Sindre Bornstein	Nordic Innovation	Nordic
Cecilie Brøkner	Innovation Fund Denmark	Denmark
Paula Eerola	RCF	Finland
Håkon Haugli	Innovation Norway	Norway
Ágúst Hjörtur Ingþórsson	RANNIS	Iceland
Claus Meineke	EUDP, chair member Nordic Energy Research	Denmark
Johnny Mogensen	NordForsk	Nordic
Søren Serritzlew	DFF	Denmark
Cecilia Sjöberg	VINNOVA	Sweden
Klaus Skytte	NER	Nordic
Kasper Søgaard	Chair member Nordic Innovation	Denmark
Rune Vistad	RCN, chair member NordForsk	Norway

References for the desk research study

Draghi, M. 2024a. The future of European competitiveness. Part A, A competitiveness strategy for Europe.

Draghi, M. 2024b. The future of European competitiveness. Part B, In-depth analysis and recommendations.

Liimatainen, T. 2023. Nordic added value in Nordic research co-operation. Concept and practice. NordForsk.

Mattsson, P. 2026. Svensk forsknings- och innovationspolitik i en ny geopolitisk era. Entreprenörskapsforum.

NordForsk 2019. Ten years of Nordic Research Funding, 2009–2018.

NordForsk 2023. NordForsk Impact Report 2023

NordForsk 2024. Nordic perspectives on research impact. An exploratory study of how Nordic research funding institutions define and measure impact.

NordForsk. 2025. Impact Report 2025.

Nordic Council of Ministers and Nordic Council. 2018. Helsingforsaftalen. Samarbejdsoverenskomst mellem Danmark, Finland, Island, Norge og Sverige.

Stafström, S. 2024. Nordic research infrastructure collaboration. Recommendations for common Nordic activities. NordForsk.

Ørskov, F. 2024. Nordic Added Value in Interministerial Nordic Co-operation. Nordic Council of Ministers.