

DEFENSE DAY 2026

OUTCOMES & KEY TAKEAWAYS REPORT

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INTRODUCTION

Defense Day 2026 was held on 21 April 2026 in Lund, Sweden, and brought together stakeholders from across the defense, security, dual-use, innovation, and resilience ecosystem for a full day of discussions, collaboration, and strategic exchange.

The event was organized by Ideon Science Park and developed as a high-level working forum focused on strengthening cooperation between industry, public actors, academia, investors, and defense-related organizations. Rather than functioning as a traditional conference, Defense Day was intentionally designed as an interactive discussion platform centered around concrete challenges, strategic opportunities, and ecosystem development.

More than 350 participants attended the event, representing:

- Defense and armed forces
- Government agencies and public sector actors
- Large industry and primes
- Startups and scale-ups
- Academia and research institutions
- Investors and venture capital actors
- Nordic and international ecosystem organizations
- Innovation and testbed environments

Participants represented organizations from Sweden as well as several Nordic and international actors, reflecting the increasingly cross-border nature of defense innovation, resilience, dual-use technologies, and capability development.

The overall purpose of Defense Day was to:

- Strengthen dialogue, networks and collaboration across sectors
- Explore how innovation ecosystems can better support defense and resilience capabilities
- Identify barriers and opportunities related to procurement, funding, collaboration, and operational adoption
- Create stronger connections between, established industry, public actors, and end users
- Facilitate concrete conversations around future collaboration, capability development, and strategic coordination

The event was structured around seven thematic tracks, each consisting of three moderated breakout sessions.

The discussions throughout the day highlighted several recurring themes, including ecosystem and market fragmentation, procurement frameworks as one of the primary barriers to innovation adoption, and the critical role of trust-based relationships and networks within the defense ecosystem.

This report summarizes the main discussions, insights, challenges, and opportunities identified across the different tracks and sessions during Defense Day 2026. The report is based on notes and observations gathered by moderators and note takers throughout the event and aims to provide a strategic overview of the key themes and perspectives that emerged during the discussions.

OVERVIEW

Track	Theme	Moderator(s)
Track 1	From Pilots to Signed Deal	Rasmus Brasilier, Millog
Track 2	Fragmented Nordics	Peter Sperling, NFC
Track 3	Building Fast Innovation Loops	Magnus Feuer, Volvo; Mart Laatsit, CIRCLE; Johan Grundström Eriksson, Lund University
Track 4	Funding Structure for Startups and Scaleups	Ida Herbertson, Skåne Ventures
Track 5	Enabling the Development of Meaningful Space Capabilities	Patrik Sandin, Beyond Gravity
Track 6	Industry Collaborations	Toni Eriksson & Victor Mukherji, SOFF
Track 7	Nordic Infrastructure and Testbeds	Henrik Hassing, FORCE Technology

OVERALL THEMES ACROSS TRACKS

Several common themes emerged across the seven tracks, highlighting structural challenges and opportunities that cut across domains such as procurement, funding, collaboration, space, infrastructure, and innovation systems.

One of the most consistent findings was the challenge of fragmentation. Whether discussing Nordic collaboration, funding mechanisms, testbed infrastructure, procurement pathways, or innovation ecosystems, participants repeatedly pointed to the fact that actors often operate in silos; nationally, institutionally, and across sectors. While strong capabilities exist throughout the ecosystem, they are frequently disconnected, resulting in duplicated efforts, weak demand signals, inefficient use of resources, and slower innovation cycles. Across multiple discussions, participants emphasized the need for more integrated ecosystems that connect governments, industry, startups, academia, investors, and end users around shared priorities and clearer coordination mechanisms. Stronger Nordic collaboration, cross-sector platforms, and structures with clear ownership and execution mandates were identified as key opportunities to address this challenge.

Another recurring theme was the role of procurement as both the largest bottleneck and the most powerful lever for change. Participants across nearly all tracks described current procurement systems as slow, risk-averse, and overly focused on predefined specifications, limiting the adoption of innovation and discouraging investment. At the same time, procurement was repeatedly highlighted as one of the

strongest tools available for shaping markets, creating demand, reducing uncertainty, and accelerating capability development. Several discussions emphasized the need to move towards more problem-driven and outcome-oriented procurement models, where governments and agencies act as strategic customers and enable faster experimentation, validation, and scaling of new solutions.

A third theme that emerged consistently throughout the event was the importance of trust, relationships, and networks. Participants noted that collaboration within the defense ecosystem is often enabled by strong personal relationships and trusted networks, which can significantly accelerate cooperation and decision-making. However, these same networks can also create barriers for new entrants, particularly startups and SMEs, which may struggle to access the right stakeholders and opportunities. The discussions highlighted a tension between the efficiency that trust-based networks can provide and the need for greater openness and transparency within the ecosystem. As a result, many participants called for more structured collaboration platforms, matchmaking mechanisms, and transparent access points that can help broaden participation while maintaining the trust required for effective collaboration.

Taken together, these themes suggest that the future competitiveness of the Nordic and European defense innovation ecosystem will depend not only on technological development, but also on the ability to build stronger connections between actors, create more effective procurement and funding structures, and foster collaboration environments that are both trusted and accessible.

THE TRACKS IN DEPTH

Track 1 – From Pilots to Signed Deal

Session Topics:

1. What can big corps do to enable themselves to work with startups / SMEs?
2. How do we successfully support the startups in the process from pilot → procurement → scale (while retaining critical capabilities in Europe / Sweden / New Nordics)?
3. What enables governments and agencies to successfully act as anchor customers?

This track focused on how startups, SMEs, corporations, and government actors collaborate to move innovations from pilot to procurement and scale within the defense sector. Particular attention was given to ecosystem dynamics, trust, and the role of government as a buyer and enabler.

Key Message

Defense innovation scaling depends less on technology maturity and more on trusted collaboration frameworks, faster procurement pathways, and strong end-user integration.

A recurring theme was the disconnect between innovation and procurement, with promising technologies struggling to transition into operational use. Trust-based relationships, informal networks, and personal connections were found to play a disproportionate role in determining access to markets.

The system was described as slow, risk-averse, and heavily weighted toward established actors, creating structural barriers for new entrants. Stronger dual-use pathways and early engagement with end users were highlighted as critical accelerators.

Key Takeaways

1. Trust and relationships drive execution more than formal systems

The defense ecosystem relies heavily on informal networks and trusted relationships to enable progress from innovation to deployment. This creates both efficiency for incumbents and barriers for newcomers.

Building trust is therefore not only relational but strategic. It enables risk-taking, faster decisions, and co-creation with the end user.

2. Procurement remains the primary systemic bottleneck

Slow, risk-averse procurement processes prevent innovations from scaling, even when technological validation exists. Governments struggle to articulate needs, while companies struggle to navigate opaque processes.

Without reform toward demand-driven, problem-based procurement, innovation pipelines will remain constrained.

3. End-user integration is critical for successful scaling

Innovations that succeed are consistently co-developed with end users, allowing iterative adaptation and real-world validation.

Lack of access to operational environments and feedback loops prevents companies from aligning product development with real defense needs.

Main Discussion Themes

Theme 1: From Pilot to Procurement

Discussion Summary

Participants highlighted a recurring gap between successful pilot projects and actual procurement contracts. While many startups and SMEs demonstrate strong technological capabilities, they often struggle to transition into long-term operational deployment due to unclear procurement pathways and limited ownership after pilot phases.

The discussions emphasized that procurement systems are frequently too slow and risk-averse to support rapid innovation cycles. Participants noted that innovation pilots often end without clear continuation mechanisms, despite positive outcomes. Early involvement of procurement stakeholders and clearer transition criteria between pilots and contracts were identified as important ways to reduce friction.

The importance of maintaining continuous dialogue with end users was repeatedly emphasized. Participants described operational feedback loops as critical for ensuring that solutions remain relevant, adaptable, and aligned with actual field needs.

Challenges / Barriers

- No clear ownership after pilot phases
- Slow and risk-averse procurement systems
- Limited incentives to take procurement risks
- Weak pathways from pilot to operational deployment

Opportunities Identified

- Earlier procurement involvement in innovation projects
- Clear transition frameworks from pilot to contract
- Stronger end-user integration and feedback loops
- More agile and iterative development processes

Theme 2: Collaboration Between Startups, SMEs, and Large Corporations

Discussion Summary

Participants discussed how large corporations increasingly recognize the value of collaborating with startups and SMEs, particularly in areas related to agility, innovation, and emerging technologies. However, significant cultural and organizational barriers remain.

Several participants highlighted that large corporations often struggle to understand the realities and operating conditions of startups and SMEs. At the same time, smaller companies frequently lack the networks, sales channels, and organizational access needed to engage effectively with large defense actors.

Neutral intermediary platforms such as incubators, accelerators, and innovation environments were identified as especially valuable in bridging this gap. Participants described these actors as “middle-men” capable of translating expectations, facilitating collaboration, and reducing barriers between organizations operating under very different conditions.

Challenges / Barriers

- Cultural and organizational gaps between startups and large corporations
- Limited natural arenas for interaction and collaboration
- Difficulty aligning innovative capabilities with established organizational needs
- Large corporations often lack internal structures for startup engagement

Opportunities Identified

- Expansion of accelerators, incubators, and collaboration platforms
- Greater use of neutral proving grounds and innovation environments
- Combining large-scale industrial capacity with startup agility and innovation
- Increased active learning and open innovation models within corporations

Theme 3: Governments and Agencies as Anchor Customers

Discussion Summary

The third session focused on how governments and agencies can function as reliable anchor customers for emerging companies and innovation initiatives. Discussions highlighted that public actors have significant potential to accelerate innovation adoption, but often struggle with responsiveness, flexibility, and access mechanisms for new entrants.

Participants noted that procurement processes frequently favor established actors and existing defense networks, making it difficult for startups and SMEs to gain access. The role of trust-based networks and insider relationships was described as highly influential within the defense sector, both as an enabler and a barrier.

Several participants emphasized that dual-use pathways are often the most realistic entry point for startups, allowing companies to first establish themselves within civilian or industrial markets before

expanding into defense applications. Lessons from Ukraine and Finland were repeatedly referenced, particularly regarding iterative development, operational responsiveness, and rapid capability adaptation.

Challenges / Barriers

- Procurement bias toward incumbents and established networks
- Limited responsiveness to unsolicited innovation
- Difficulty accessing relevant end customers and decision-makers
- Slow institutional adaptation and limited proactive engagement

Opportunities Identified

- Structured intake channels for emerging innovation
- Broader Nordic and European anchor customer frameworks
- Greater integration of industrial perspectives into total defense discussions
- Increased learning from operational environments such as Ukraine

Strategic Reflection

The discussions in Track 1 demonstrated that defense innovation is fundamentally an ecosystem challenge rather than purely a technological one. While startups and SMEs possess significant innovative capabilities, scaling these solutions depends on creating trusted collaboration structures, reducing procurement friction, and strengthening direct connections to operational users.

The sessions also highlighted that innovation adoption within defense ecosystems remains heavily relationship-driven. Internal champions, intermediaries, and trusted networks continue to play a decisive role in enabling collaboration and accelerating procurement pathways.

Finally, the discussions underscored the importance of dual-use approaches, iterative development models, and cross-sector collaboration in strengthening European and Nordic defense capabilities.

Track 2 – Fragmented Nordics

Session Topics

1. What should be the overarching goal for a Nordic collaboration within defense innovation?
2. How should a collaboration be executed and funded?
3. Who should be included?
(e.g. Geography: How big is the Nordics? Germany? Canada? The Baltics)

This track examined how the Nordic countries can move from loosely aligned national innovation systems toward a more integrated defense innovation ecosystem. Discussions focused on governance models, funding structures, procurement alignment, and how to operationalize collaboration across industry, government, and academia to achieve scale and speed in capability development.

Key Message

The Nordics share values, threats, and technological strengths, but without faster integration, shared standards, and coordinated execution, the region risks remaining strategically fragmented.

Across all three sessions, a consistent narrative emerged: Nordic countries share common values, security threats, and technological strengths, yet operate in fragmented national silos. The result is duplicated effort, reduced scale, and slower innovation cycles compared to more unified ecosystems.

At the same time, there is significant untapped opportunity to act as a single, integrated innovation environment. Discussions highlighted the need for shared standards, joint procurement frameworks, and coordinated funding mechanisms, alongside new organizational structures that can bridge across government, industry, and academia.

Another major theme was the importance of balancing openness and trust. Participants repeatedly emphasized that Nordic collaboration should remain inclusive toward countries and actors that share similar values, while still recognizing the strategic importance of trusted networks, interoperability, and security of supply.

Key Takeaways

1. Fragmentation is the Nordics' primary strategic constraint

Despite strong alignment in values and geopolitical context, Nordic countries largely innovate independently. This leads to inefficiencies such as duplicated investments, limited economies of scale, and fragmented demand signals for industry.

The lack of coordination also affects operational readiness, as systems are not always interoperable and resources are not effectively shared across borders. Participants emphasized that integration, rather than additional funding or capability, would deliver the greatest immediate strategic benefit.

2. A shared Nordic market is essential for scaling innovation

Individually, Nordic markets are too small to sustain large-scale defense innovation or industrial growth. By acting as a unified market, with aligned requirements, procurement processes, and standards, the region could create stronger demand signals and reduce risk for innovators.

This would enable companies to scale solutions across multiple countries, improving both commercial viability and operational interoperability. Without such alignment, companies face fragmented requirements and limited incentives to invest in defense innovation at scale.

3. Governance and coordination structures are underdeveloped

While mechanisms like NORDEFECO exist, they are perceived as insufficiently integrated or agile to support fast-paced innovation. There is no clear “center of gravity” for Nordic defense innovation coordination, resulting in dispersed initiatives and unclear ownership.

Participants highlighted the need for a more operational coordination layer, whether through a formal institution, network, or platform, that can define common priorities, align stakeholders, and accelerate execution across borders.

Main Discussion Themes

Theme 1: From Fragmentation to Integrated Ecosystem

Discussion Summary

The most dominant theme was the structural fragmentation of Nordic defense innovation. While countries share similar needs and technological capabilities, they continue to develop solutions independently. This results in inefficiencies, duplication, and missed opportunities for collaboration.

There was strong agreement that integration is the key multiplier: it enables scale, speeds up development, and improves interoperability. Participants highlighted that the Nordics are “fast but small,” and that integration is necessary to compete with larger global actors.

However, integration must be selective. Not all capabilities need to be shared, and there is a need to distinguish between areas where collaboration adds value and where national ownership is strategically necessary.

Challenges / Barriers

- National silos and independent innovation strategies
- Lack of shared priorities and coordinated execution
- Risk of duplication and inefficient resource allocation

Opportunities Identified

- Creation of a unified Nordic innovation ecosystem
- Better mapping and sharing of resources, capabilities, and infrastructure
- Strategic specialization across countries to avoid redundancy

Theme 2: Procurement, Standards, and Market Formation

Discussion Summary

Procurement emerged as a central lever for enabling collaboration. Currently, fragmented national procurement systems create inconsistent requirements, limiting interoperability and reducing incentives for companies to scale solutions regionally.

Participants emphasized the importance of common standards, shared procurement plans, and aligned requirements across Nordic countries. This would create a larger, unified market and provide clearer demand signals to industry.

There was also discussion around shifting procurement models toward greater flexibility and risk tolerance, enabling faster adoption of innovative solutions. The need to move away from overly rigid, specification-based procurement toward problem-driven approaches was implied.

Challenges / Barriers

- Divergent national procurement systems and requirements
- Lack of standardization and interoperability
- Risk-averse procurement culture

Opportunities Identified

- Joint Nordic procurement strategies
- Common standards and requirement frameworks
- Creation of a single addressable market for defense innovation

Theme 3: Organizational Models and Funding Mechanisms

Discussion Summary

A key question was how Nordic collaboration should be organized in practice. Multiple models were proposed, ranging from formal institutions and political bodies to agile networks and platforms.

There was no consensus on a single structure, but strong agreement that current arrangements lack the speed and coordination required. Participants emphasized the need for a flexible, execution-oriented model that can bring together government, industry, academia, and investors.

Funding was also a critical issue. Current mechanisms are often complex, fragmented, and inaccessible to SMEs. There is a need for coordinated funding approaches, including project-based co-funding and increased risk willingness.

Challenges / Barriers

- Lack of a clear coordinating body for Nordic innovation
- Complex and fragmented funding mechanisms
- Limited accessibility for SMEs

Opportunities Identified

- Establishment of a Nordic coordination platform or “umbrella” organization
- Project-based, co-funded Nordic initiatives
- Greater involvement of private capital and venture funding

Theme 4: Industry, Ecosystem Inclusion, and End-User Integration

Discussion Summary

Effective Nordic collaboration requires inclusion across the full ecosystem, not just governments, but also industry, startups, academia, and end users.

Participants stressed the importance of involving the end user (the military) earlier in the innovation process to ensure that solutions are aligned with operational needs. There is also a need to create environments where innovators and users can interact directly, accelerating feedback loops and improving outcomes.

Industry collaboration was seen as a key enabler, but it requires trust, aligned incentives, and platforms for coordination. The current ecosystem lacks sufficient interfaces for these interactions.

Challenges / Barriers

- Limited integration between innovators and end users
- Weak coordination across ecosystem actors
- Insufficient collaboration platforms

Opportunities Identified

- Platforms for direct interaction between innovators and military users
- Stronger inclusion of SMEs and startups in Nordic initiatives
- Cross-sector collaboration models (government–industry–academia)

Strategic Reflection

Track 2 highlights a fundamental strategic opportunity: the Nordics already possess the ingredients of a world-class defense innovation ecosystem, but lack the integration required to unlock it.

In a global context defined by rapid technological change and increasing geopolitical competition, scale and speed are critical. Individually, Nordic countries are agile but limited. Collectively, they have the potential to act as a highly competitive innovation bloc, capable of developing, deploying, and exporting advanced defense capabilities.

Realizing this potential requires moving beyond coordination at the policy level toward operational integration: aligned procurement, shared standards, coordinated funding, and joint execution. It also requires a shift in mindset, from national optimization to collective advantage.

Ultimately, the success of Nordic defense innovation will depend on the ability to build a system that is both integrated and flexible, combining shared direction with decentralized execution, and enabling both collaboration and specialization across the region.

Track 3 – Building Fast Innovation Loops

Session Topics

1. How to implement innovation mindset/process/culture?
2. How to build an innovation system in a regulated landscape?
3. What is needed for building a good collaboration platform? What does it take?

This track explored how to build and operationalize innovation within highly regulated defense environments, balancing the need for speed, risk-taking, and collaboration with governance, compliance, and institutional constraints. Discussions spanned cultural, structural, and regulatory dimensions, with a focus on enabling faster innovation cycles across armed forces, industry, and emerging actors.

Key Message

Defense innovation is primarily constrained by culture, bureaucracy, and risk aversion, not by lack of ideas or technology.

Across all three sessions, participants repeatedly emphasized that innovation within defense ecosystems depends on organizational culture, incentives, and the willingness to experiment under uncertainty. While technological capability exists across industry and academia, many organizations remain constrained by hierarchical structures, regulatory complexity, slow decision-making, and low tolerance for failure.

A major recurring theme was that innovation often emerges most effectively during crises or periods of urgency. Participants pointed to both military and industrial examples where pressure, necessity, and operational demands accelerated innovation significantly faster than traditional peacetime structures. Several discussions referenced Ukraine as an example of rapid iterative development driven by operational realities and fast feedback loops.

The discussions also highlighted the tension between regulation and innovation. While participants acknowledged the importance of regulatory frameworks, many argued that current systems are overly complex, administratively heavy, and insufficiently adapted to dual-use innovation and rapid experimentation. Sandbox environments, simplified processes, and closer communication between regulators, industry, and defense actors were identified as important opportunities.

Key Takeaways

1. Innovation is constrained more by culture and incentives than by capability

Participants emphasized that the primary barrier to innovation is not technological or financial, but organizational. Large defense institutions and corporations struggle with risk aversion, misaligned incentives, and entrenched behaviors, particularly at middle management levels. Without clear personal or organizational incentives, innovation efforts stagnate despite broad recognition of their importance.

Creating a sense of urgency, often described as “simulating a crisis”, was identified as a key mechanism to unlock action. Leadership commitment, aligned incentives, and tolerance for failure are central to shifting behavior and enabling continuous innovation.

2. Regulatory complexity is a systemic barrier to speed and experimentation

The regulatory environment, particularly in dual-use contexts, creates significant friction across the innovation lifecycle. Compliance requirements are costly, slow-moving, and often unclear, forcing actors to navigate parallel civilian and military frameworks. This complexity delays testing, scaling, and procurement, ultimately disadvantaging the ecosystem compared to less constrained environments.

At the same time, participants recognized that regulation plays a necessary role in providing direction and trust. The challenge is not deregulation per se, but achieving a balance: simplifying rules, increasing legal clarity, and introducing mechanisms such as sandboxes to enable controlled experimentation.

3. Ecosystem fragmentation limits innovation impact

A lack of coordination and communication between key actors, armed forces, industry, startups, and regulators was identified as a major bottleneck. Innovation efforts are often isolated, with limited understanding of each actor’s needs, constraints, and incentives. This leads to missed opportunities, duplicated efforts, and slow uptake of new solutions.

There is a strong need for structured collaboration platforms that facilitate matchmaking between problem owners and solution providers, enable early engagement, and build trust across the ecosystem. Events, shared environments, and transparent communication channels are critical enablers.

Main Discussion Themes

Theme 1: Organizational Culture and Incentives for Innovation

Discussion Summary

Innovation within defense and large industrial organizations is primarily constrained by internal culture rather than external factors. Participants highlighted a systemic “too busy to improve” dynamic, where operational demands crowd out long-term innovation efforts. Risk aversion, particularly in peacetime environments, further reduces willingness to experiment.

Middle management emerged as a critical bottleneck: while strategic leadership often supports innovation, execution layers lack both the mandate and incentives to act. Additionally, traditional career structures and performance metrics do not reward experimentation or risk-taking.

To counter this, participants emphasized the importance of leadership-driven cultural change, decentralized decision-making (e.g., mission command principles), and the use of small-scale pilots to demonstrate value and build momentum.

Challenges / Barriers

- Risk aversion and low tolerance for failure in non-operational settings

- Misaligned incentives, particularly at middle management level
- Lack of time and structural prioritization for innovation

Opportunities Identified

- Introduce targeted incentive structures linked to innovation outcomes
- Use small pilot projects to enable “fail fast, fail cheap” experimentation
- Strengthen leadership signaling and mandate decentralized decision-making

Theme 2: Regulation as Both Enabler and Constraint

Discussion Summary

Regulation was identified as both a critical enabler of trust and a significant barrier to innovation. Participants pointed to increasing compliance costs, unclear legal frameworks, and overlapping civilian-military regulations as major sources of friction. In particular, dual-use technologies face compounded complexity, slowing development and deployment cycles.

However, regulation can also serve as a market-shaping mechanism, creating demand and guiding innovation efforts. The key challenge lies in designing regulatory frameworks that are adaptive, transparent, and supportive of experimentation. Concepts such as regulatory sandboxes and simplified testing environments were highlighted as practical solutions.

Additionally, informal layers of “self-regulation” and overly cautious interpretation of rules further exacerbate delays, suggesting that cultural change is also needed within regulatory bodies.

Challenges / Barriers

- High compliance costs and administrative burden
- Lack of clarity in dual-use regulatory frameworks
- Slow approval processes for testing and deployment

Opportunities Identified

- Establish sandbox environments for rapid experimentation and testing
- Simplify and harmonize regulations across civilian and military domains
- Increase dialogue between regulators, industry, and end users

Theme 3: Creating Collaborative Innovation Platforms

Discussion Summary

The third session focused on what is needed to create stronger collaboration platforms capable of accelerating innovation within the defense ecosystem. Participants repeatedly highlighted the importance of trust, communication, and direct interaction between innovators, operational users, industry, and public actors.

Many discussions centered around the gap between problem owners and solution providers. Participants argued that armed forces and government actors often struggle to communicate operational needs clearly, while industry and startups lack sufficient access to end users and practical operational environments.

Several groups proposed the creation of more open matchmaking structures, test environments, and “open desk” concepts where operational problems can be shared and addressed collaboratively. Events, demo arenas, and ecosystem platforms such as Amyna were highlighted as important examples of how these connections can be facilitated.

The role of bureaucracy was also discussed extensively. Participants described existing systems as too slow and inflexible to handle emerging technologies and rapidly evolving operational requirements. Stronger collaboration between sectors, combined with more operationally driven experimentation environments, was identified as critical for increasing innovation speed.

Challenges / Barriers

- Bureaucratic and slow-moving systems
- Weak communication between end users and innovators
- Limited opportunities for matchmaking and collaboration
- Sensitive information restricting broader ecosystem involvement
- Difficulty funding defense-focused innovation initiatives

Opportunities Identified

- Open collaboration and matchmaking platforms
- Stronger engagement between armed forces and industry
- More operationally driven experimentation environments
- Increased use of events, demo arenas, and testbeds
- Greater focus on end-user needs and operational relevance

Strategic Reflection

The discussions in Track 3 demonstrated that faster innovation loops require more than technological capability, they require cultural change, organizational flexibility, and trusted collaboration structures. Participants repeatedly emphasized that innovation systems fail when organizations prioritize process optimization, risk minimization, and hierarchy over experimentation, operational relevance, and adaptability.

A central insight was that innovation ecosystems must become significantly more connected to operational users and real-world conditions. The ability to experiment rapidly, learn iteratively, and adapt based on operational feedback was repeatedly identified as a decisive factor for future competitiveness and resilience.

The sessions also highlighted the growing tension between regulation and speed. While governance and compliance remain essential, participants argued that defense ecosystems must develop more pragmatic

and adaptive approaches capable of supporting experimentation without compromising security or accountability.

Ultimately, the discussions suggested that future defense innovation leadership will depend on the ability to combine trusted ecosystems, agile organizational cultures, and direct operational collaboration into faster and more integrated innovation systems.

Track 4 – Funding Structure for Startups and Scaleups

Session Topics

1. How to use CVC arms to support innovation through investments?
2. How can public funding, private capital, and primes' CVC arms work together more effectively?
3. Is there a need for a new VC fund and who should be a part of it?

This track explored how defense and dual-use startups can access funding and scale within the Nordic and European ecosystem. Discussions focused on corporate venture capital (CVC), public funding, private investment, dual-use business models, and whether new Nordic or European defense-focused investment structures are needed to support long-term capability development and strategic sovereignty.

Key Message

The Nordic defense innovation ecosystem does not primarily lack capital, it lacks risk appetite, speed, coordination, and investment structures adapted to the realities of defense and deep-tech startups.

Across all three sessions, participants repeatedly highlighted that defense and deep-tech startups operate under fundamentally different conditions compared to traditional software startups. Longer development cycles, high regulatory complexity, expensive testing requirements, and uncertain procurement timelines make defense innovation significantly more capital intensive and risk sensitive.

A recurring theme throughout the discussions was the mismatch between existing investment structures and the needs of early-stage defense companies. Participants questioned whether traditional venture capital and current CVC models are sufficiently adapted to support long-term defense capability development. While there is increasing interest in dual-use and defense technologies, participants argued that much of the ecosystem still lacks the risk tolerance, speed, and strategic perspective required to scale these companies successfully.

The discussions also emphasized the importance of trust, relationships, and ecosystem access. Participants repeatedly described investment as highly relationship-driven, where networks, exposure, and credibility often determine access to capital as much as technology quality itself. Platforms, incubators, and ecosystem intermediaries were therefore highlighted as critical enablers for connecting startups with investors, industry, and procurement actors.

Another major theme was the tension between dual-use positioning and defense specialization. While dual-use approaches are often necessary for attracting public funding and reducing investor risk, participants also described dual-use as potentially limiting or strategically problematic in practice, particularly when scaling defense-specific capabilities.

Key Takeaways

1. Early-Stage funding gap requires structural rethinking

Current investment models, particularly CVC, are not well-suited to early-stage defense innovation. High capital requirements, long timelines, and system-level integration challenges make small, incremental investments ineffective. There is a clear need for larger early-stage funding combined with faster development cycles to build momentum and reduce time to deployment.

2. Public sector has a critical role in de-risking the market

Public institutions must take a leading role in shaping the market, setting clear demand signals, and reducing uncertainty. Without transparent procurement pathways and political commitment, private capital remains hesitant. Public funding is not only a financial tool but also a mechanism to legitimize and catalyze broader investment flows.

3. Ecosystem coordination and trust are core enablers of investment

Participants emphasized that investment decisions within defense ecosystems remain heavily dependent on networks, trust, and exposure. Startups often struggle not only because of funding gaps, but because they lack access to the right contacts, procurement actors, strategic partners, and investors capable of understanding the defense sector.

4. Capital exists, but risk appetite and speed remain insufficient

A recurring insight was that there is significant capital available within the Nordic ecosystem, but too little willingness to take early-stage risk within defense innovation. Participants repeatedly contrasted Nordic and European investment culture with the United States, highlighting differences in speed, failure tolerance, and willingness to fund uncertain but high-potential ventures.

Main Discussion Themes

Theme 1: Structural Limitations of CVC in Defense Innovation

Discussion Summary

CVC was widely discussed as an imperfect fit for early-stage defense innovation. While it provides industry expertise and potential customer pathways, it introduces structural constraints for startups, including lock-in effects, limited flexibility, and strategic dependency. CVCs often require clearer commercialization paths and lower risk profiles than early-stage defense startups can offer.

In addition, the defense sector's characteristics, high capital intensity, long development cycles, and the need to deliver integrated systems rather than standalone features, further complicate the use of traditional CVC models. Compared to the U.S., where ecosystems are more mature and risk-tolerant, the Nordic environment lacks both the experience and appetite for such investments at early stages.

Challenges / Barriers

- CVCs are not well-equipped for high-risk, early-stage investment

- Startup lock-in limits future funding flexibility and market access
- Misalignment between CVC expectations and defense product development cycles
- Long development timelines and uncertain procurement pathways
- Limited ecosystem access and networking opportunities

Opportunities Identified

- Development of alternative VC models specialized in defense
- Increased early-stage capital with higher risk tolerance
- Creation of platforms and programs to expose startups to multiple investors
- Earlier engagement between corporations and emerging companies
- Larger and faster early-stage investment structures

Theme 2: The Role of Public Funding and Market Signaling

Discussion Summary

The second session explored how public funding, private investors, and CVC structures can collaborate more effectively to support defense innovation. Participants highlighted that while private investors are increasingly interested in dual-use technologies, many still lack sufficient understanding of the defense sector and its dynamics.

A recurring discussion centered around the role of public actors in shaping the market and reducing uncertainty for investors. Participants argued that public funding initiatives, procurement signals, and political direction are necessary to create confidence within the ecosystem and encourage larger private investment flows.

Dual-use models were discussed extensively. Several participants described dual-use as an effective way to validate technologies, reduce market risk, and attract investment. At the same time, others warned that dual-use positioning can create operational complexity, contractual limitations, and strategic ambiguity when companies later attempt to scale within defense markets.

Participants also emphasized the need for greater transparency regarding procurement plans, capability priorities, and market demand. Investors often hesitate not because of the technology itself, but because of uncertainty regarding timelines, customers, and long-term adoption pathways.

Challenges / Barriers

- Limited sector understanding among private investors
- Risk-averse public and private funding structures
- Unclear procurement signals and market visibility
- Regulatory complexity around dual-use technologies
- Fragmented funding pathways for startups and SMEs

Opportunities Identified

- Stronger collaboration between public and private capital
- Increased political commitment and strategic direction
- Better communication of defense capability needs
- Greater acceptance of defense-focused investments
- Improved transparency around procurement and acquisition plans

Theme 3: Need for New Investment Models and Nordic Collaboration

Discussion Summary

The final session focused on whether there is a need for new Nordic or European defense-focused investment funds and what such structures should aim to achieve. Participants discussed whether existing VC models are sufficiently adapted to defense innovation or whether new long-term strategic investment mechanisms are required.

A recurring theme was that Nordic investors often think too small and invest too cautiously compared to larger international ecosystems. Participants highlighted that many promising startups struggle to move from startup to scale-up phases due to insufficient capital, fragmented markets, and limited access to strategic investors capable of supporting long-term growth.

Several participants discussed the strategic value of creating Nordic or European investment structures capable of supporting sovereignty, resilience, industrial capacity, and long-term capability development. However, there was also skepticism regarding whether simply creating another VC fund would solve the underlying ecosystem challenges if investment behavior and risk culture remain unchanged.

The discussions also highlighted geopolitical considerations, including security regulations, ownership concerns, strategic autonomy, and the importance of trusted European capital structures within sensitive sectors.

Challenges / Barriers

- Limited scale and risk appetite among Nordic investors
- Difficulty scaling startups into larger defense companies
- Regulatory and geopolitical complexities around ownership and investment
- Lack of trust that public customers will procure solutions long term
- Long time horizons before returns materialize

Opportunities Identified

- Nordic or European strategic investment funds
- Stronger collaboration between governments, industry, and institutional investors
- More specialized defense-focused investment expertise

- Matchmaking platforms between startups and investors
- Long-term investment strategies focused on sovereignty and resilience

Strategic Reflection

The discussions in Track 4 demonstrated that defense innovation financing is not only a capital challenge, but also a structural and cultural one. Participants repeatedly emphasized that existing Nordic and European investment ecosystems remain too cautious, fragmented, and slow to support the pace and scale of innovation now required within defense and dual-use sectors.

A major insight was that strategic defense capability development requires investment models fundamentally different from traditional software or consumer-focused venture capital. Long development timelines, regulatory complexity, and uncertain procurement environments require investors capable of taking longer-term, strategic, and ecosystem-oriented perspectives.

The sessions also highlighted that trust, exposure, and ecosystem connectivity remain central to investment success. Startups need not only funding, but also access to networks, procurement actors, industrial partners, and strategic visibility.

Finally, the discussions suggested that future competitiveness may depend less on whether the Nordics create entirely new investment structures, and more on whether the region can build a stronger culture of strategic risk-taking, faster decision-making, and coordinated long-term capability investment.

Track 5 – Enabling the Development of Meaningful Space Capabilities

Session Topics

1. How can Sweden achieve relevant and competitive space capabilities?
2. How should the desire for ‘sovereign’ capabilities be interpreted, and leveraged?
3. How can procurement frameworks better support innovation, capability development, and operational deployment?

This track explored how Sweden and the Nordics can develop relevant, competitive, and sovereign space capabilities that strengthen resilience, defense, and strategic autonomy. Discussions focused on sovereignty, procurement structures, ecosystem development, industrial strategy, and how public and private actors can collaborate to build meaningful long-term space capabilities within Europe and the Nordics.

Key Message

To become a competitive space actor, Sweden must move beyond research and establish clear priorities, strategic direction, and demand-driven procurement.

Across all three sessions, participants repeatedly emphasized that Sweden possesses strong technical expertise and industrial potential within space technologies, but lacks the political prioritization and procurement frameworks necessary to transform these strengths into strategic capabilities.

A recurring theme throughout the discussions was the importance of defining what “sovereignty” and “rådighet” actually mean in practice. Participants stressed that no country can realistically control every part of the space value chain independently, and that future resilience will instead depend on identifying critical capabilities, building strategic specializations, and creating mutual dependencies within Nordic and European ecosystems.

Another major discussion centered around procurement and industrial policy. Participants argued that current procurement systems are too slow and risk-averse to effectively support innovation, experimentation, and operational capability development. At the same time, several participants highlighted that much of the available public funding remains heavily research-oriented and grant-based, rather than focused on enabling long-term industrial scaling and deployment.

The discussions highlighted the importance of moving beyond viewing space solely as research infrastructure. Participants stressed that space needs to be treated as critical infrastructure connected to defense, communication, positioning, intelligence, resilience, and industrial competitiveness.

Key Takeaways

1. Strategic focus and specialization are critical

Sweden cannot compete across the full space value chain and must instead prioritize niche areas where it can achieve global leadership. A clear national vision, backed by political commitment, is required to determine which capabilities to develop and sustain.

Without this focus, Sweden risks continuing to fall behind while other nations strengthen integrated ecosystems and capture market share. Specialization also enables leverage in international partnerships through mutual dependency.

2. Sovereignty should be selective and capability-based

Sovereignty is not about full independence, but about maintaining control over critical capabilities, particularly those related to data access, communication, and crisis response. The discussions highlighted that capability ownership, not infrastructure alone, defines true sovereignty.

At the same time, full national control is neither economically feasible nor strategically desirable. Instead, Sweden and the Nordics must balance independence in key areas with cross-border collaboration and shared infrastructure.

3. Procurement and political direction determine capability development

Participants stressed that meaningful space capability development requires governments to act as strategic customers and ecosystem enablers. Without demand signals, procurement pathways, and political understanding of space technologies, companies struggle to scale solutions or justify large-scale investments.

4. Space capability is an ecosystem challenge, not a technology challenge

The discussions highlighted that Sweden already possesses much of the technical competence required for advanced space capabilities. The primary barriers were instead identified as political prioritization, fragmented ecosystems, procurement limitations, and lack of long-term industrial strategy.

Main Discussion Themes

Theme 1: Building Competitive Space Capabilities

Discussion Summary

The first session focused on what constitutes a “relevant and competitive” space capability for Sweden and how the country can position itself strategically within the Nordic and European ecosystem.

Participants repeatedly emphasized that Sweden cannot and should not attempt to dominate every part of the space sector. Instead, discussions centered around identifying strategic niches where Sweden can create unique value and become internationally competitive.

The discussions also highlighted that Sweden currently lacks significant upstream capabilities and remains highly dependent on foreign systems and infrastructure. Several participants stressed the

importance of creating more complete domestic value chains and ensuring that critical space functions remain available both in peacetime and during crises.

Another recurring discussion focused on the role of politicians and public institutions. Participants argued that many political actors still view space primarily as a research domain rather than as critical infrastructure and strategic capability development. Educating policymakers and increasing understanding of space technologies were therefore repeatedly highlighted as essential next steps.

Challenges / Barriers

- Lack of upstream capabilities and end-to-end infrastructure
- Weak policy prioritization and limited political understanding
- Fragmented European efforts and national competition
- Procurement systems that fail to create market demand

Opportunities Identified

- Building specialized strategic capabilities
- Stronger integration into European value chains
- Creating end-to-end capability chains
- Treating space as critical infrastructure rather than only research

Theme 2: Sovereignty, “Rådighet,” and Strategic Autonomy

Discussion Summary

The second session explored how sovereignty and “rådighet” should be interpreted within the space domain and what level of national or regional control is realistically required.

Participants discussed sovereignty not as total independence, but as the ability to maintain operational capability, strategic decision-making, and resilience during crises. Several groups emphasized that future sovereignty will likely depend less on owning every system domestically and more on ensuring trusted access, leverage, and mutual dependencies within allied ecosystems.

A recurring discussion focused on specialization and strategic interdependence. Participants argued that Nordic countries should avoid duplicating identical infrastructure and instead coordinate around complementary strengths and capabilities. This would allow countries to build leverage within alliances while reducing unnecessary overlap and fragmentation.

The discussions also highlighted the growing role of private companies within critical infrastructure and space services. Participants raised questions regarding ownership, control, regulation, and how governments can maintain strategic influence over increasingly privatized ecosystems.

Challenges / Barriers

- Dependence on foreign-owned services and infrastructure
- Fragmented Nordic and European capability development

- Lack of leverage within international dependencies
- Unclear boundaries between public, private, and defense responsibilities
- Limited strategic coordination across countries

Opportunities Identified

- Building mutual Nordic and European dependencies
- Specializing in strategic capability niches
- Strengthening domestic industrial ecosystems
- Developing contingency planning and “Plan B” structures
- Increasing strategic coordination around sovereignty priorities

Theme 3: Procurement as a Strategic Enabler

Discussion Summary

Procurement emerged as one of the most critical systemic challenges. Discussions focused on how procurement systems can better support innovation, capability development, and operational deployment within the space sector.

Participants repeatedly described procurement as one of the largest structural barriers to innovation in Sweden and Europe. Current systems were viewed as too slow, specification-driven, and focused on minimizing risk rather than enabling experimentation and capability development. Several participants emphasized that these structures systematically disadvantage startups and smaller companies.

At the same time, participants stressed that startups and SMEs are essential contributors to the future space economy due to their agility and innovation capacity.

A recurring theme was the need for governments to act actively as strategic customers by creating clearer demand signals and procurement pathways that allow startups to contribute earlier in the development process. Participants also emphasized the importance of more iterative and risk-tolerant procurement approaches, where experimentation and failure are accepted as necessary parts of innovation.

Several discussions referenced the United States and companies such as SpaceX as examples of more agile procurement and capability development models.

Challenges / Barriers

- Risk-averse procurement culture and regulatory constraints
- Lack of capability awareness within public agencies
- Long procurement cycles and unclear demand signals
- Limited willingness to fund uncertain innovation

Opportunities Identified

- Demand-driven and outcome-based procurement models
- Funding innovation through contracts rather than grants
- Public-private partnerships with shared risk
- Using procurement as a tool to build ecosystems and markets

Strategic Reflection

The discussions in Track 5 demonstrated that the future of Nordic and European space capability development will depend less on technological competence and more on strategic coordination, political prioritization, and ecosystem-building.

A central insight was that Sweden already possesses many of the engineering and industrial foundations required for stronger space capabilities, but lacks the integrated structures necessary to scale these into operational and sovereign systems. Participants repeatedly emphasized that procurement systems, industrial policy, and political understanding currently lag behind technological potential.

The sessions also highlighted that sovereignty in space can not be understood as complete national independence. Instead, future resilience will likely depend on trusted alliances, strategic specialization, and the ability to maintain operational control and access during crises.

Ultimately, procurement emerged as one of the most critical levers for enabling space capability development. Without reforming how governments signal demand, allocate risk, and engage with industry, even strong technological capabilities risk failing to translate into operational advantage or being scaled and commercialized in countries where more supportive markets and procurement structures already exist.

Track 6 – Industry Collaborations

Session Topics

1. What collaboration models between primes and large corporations work best in defense innovation?
2. How can we build effective consortia for EDF and other joint programs?
3. What needs to change for collaboration to move from networking to signed agreements?

This track explored how collaboration models across large defense primes, corporates, SMEs, and startups can be strengthened to accelerate innovation and move from informal engagement to scalable, contractual partnerships. The discussions centered on structuring partnerships, enabling effective consortia, and reducing friction between actors across the defense ecosystem.

Key Message

Defense innovation requires structured, long-term, and trust-based collaboration models that align incentives across industry actors and significantly accelerate decision-making and contracting processes.

Across all three sessions, participants repeatedly highlighted that collaboration within the defense ecosystem is becoming increasingly necessary due to technological complexity, speed of innovation, and growing capability demands. At the same time, participants stressed that collaboration remains difficult to operationalize in practice because of regulatory constraints, IP concerns, procurement structures, and differing organizational incentives.

A recurring theme was the importance of long-term strategic relationships. Participants emphasized that startups and SMEs often struggle to scale because they lack guaranteed demand, trusted industrial partners, and stable pathways into procurement systems. Large corporations, meanwhile, were described as hesitant to engage with smaller companies unless there is confidence in long-term viability, compatibility, and operational relevance.

The discussions also highlighted the importance of clearly defined leadership, responsibilities, and expectations within collaborations and joint programs. Several participants emphasized that unclear ownership, slow decision-making, and lack of commitment frequently prevent collaborations from moving beyond exploratory discussions into concrete implementation.

Another major theme was the importance of understanding operational and end-user needs early in the process. Participants stressed that many collaborations fail because organizations spend too much time developing solutions without validating whether they solve relevant operational problems or align with future requirements.

Key Takeaways

1. Long-term partnerships are essential to unlock SME and startup participation

Sustainable collaboration depends on predictable demand, risk-sharing, and trust between large

corporations and smaller players. SMEs and startups require long-term commitments to scale production and invest in innovation without disproportionate financial risk. Larger companies play a critical role as enablers through infrastructure, certification channels, and market access. Without these structures, innovation remains fragmented and difficult to commercialize.

2. Clarity in roles, leadership, and objectives defines successful collaboration models

Effective collaboration, especially in consortia, requires early agreement on leadership, participation roles, and strategic goals. Lack of clarity leads to inefficiencies, duplicated effort, and stalled progress. Successful initiatives are characterized by strong leadership, defined targets, and aligned incentives supported by dedicated resources. Partner compatibility, including long-term viability and shared vision, is a key determinant of success.

3. Speed and decision-making are critical bottlenecks in defense collaboration

Slow processes driven by regulatory complexity, internal governance, and unclear requirements significantly hinder innovation. Delayed decisions, unclear ownership, and over-compliance reduce momentum and increase risk. Accelerating early-stage exploration while ensuring focused execution is essential. Access to decision-makers and streamlined processes is necessary to transition from exploratory discussions to formal agreements.

Main Discussion Themes

Theme 1: Structuring Industry Collaboration Models

Discussion Summary

Collaboration between large corporations, startups, and SMEs was a central theme throughout the discussions, with particular focus on how primes and larger industrial actors can collaborate more effectively with startups and SMEs within defense innovation ecosystems.

Participants discussed several potential collaboration models, including white-label solutions, umbrella structures, long-term supplier agreements, and partnerships where larger companies use existing production infrastructure and certification systems to support smaller actors. The discussions highlighted that SMEs often possess strong innovation capacity but lack the scale, networks, documentation capabilities, and procurement access needed to operate independently within defense markets.

Several participants emphasized that large corporations can play an important enabling role by acting as channels into the market, reducing regulatory barriers, and helping smaller companies navigate certification, procurement, and operational requirements. At the same time, participants stressed that corporations also need stronger incentives and clearer value propositions to engage in long-term collaboration with emerging companies.

The role of trust and contractual clarity was repeatedly emphasized. Participants noted that long-term collaboration requires stable relationships, aligned expectations, and mechanisms for sharing both risk and value creation.

Challenges / Barriers

- Regulatory and certification complexity slows down collaboration

- Misalignment between defense demand and industry supply incentives
- IP protection and NDA constraints limit open collaboration
- Lack of guaranteed demand reduces SME willingness to scale

Opportunities Identified

- Long-term strategic partnerships to reduce risk and enable scaling
- Large companies acting as intermediaries providing market access
- Shared platforms for collaboration and resource coordination
- More effective capital distribution from primes to SMEs/startups

Theme 2: Building Effective Consortia for Joint Programs

Discussion Summary

Participants emphasized that successful joint programs depend heavily on clear leadership structures, aligned expectations, and well-defined objectives from the beginning. One of the central discussions revolved around the distinction between leading and participating within consortia, and the importance of ensuring that all partners understand their roles, responsibilities, and long-term commitments.

Several participants highlighted that organizations frequently prefer working with trusted and established partners due to the long timelines, complexity, and financial risks associated with defense programs. Cultural differences between countries and organizations were also discussed as important factors influencing collaboration effectiveness.

Participants also stressed the importance of not committing excessive resources too early in uncertain collaborations. Instead, phased engagement models and demonstration-level targets were highlighted as useful ways to reduce risk while building trust and compatibility between partners.

Challenges / Barriers

- Lack of clarity in leadership vs. participant roles
- Cultural and organizational differences across partners
- Reluctance to engage with unfamiliar or unproven partners
- Premature resource commitments without sufficient alignment

Opportunities Identified

- Clearly defined leadership structures and responsibilities
- Early alignment on goals, scope, and demonstration targets
- Building consortia around trusted partners with shared vision
- Integration of dual-use perspectives to broaden collaboration value

Theme 3: Moving from Networking to Execution

Discussion Summary

A major focus of the discussions was how organizations can move from exploratory conversations and networking activities into concrete agreements and operational collaboration. Participants repeatedly emphasized that many collaboration processes become unnecessarily slow due to unclear requirements, fragmented decision-making, internal politics, and lengthy compliance procedures.

Understanding operational and end-user needs was identified as one of the most important factors for successful collaboration. Participants stressed that organizations often spend too much time solving theoretical problems rather than validating actual operational needs with users early in the process. Faster exploration phases and more direct feedback loops were therefore highlighted as critical for reducing wasted effort and improving implementation speed.

The discussions also emphasized the importance of balancing commitment levels within collaborations. Both overcommitment and lack of commitment were described as problematic: too little commitment slows momentum, while too much commitment too early can create unnecessary complexity and risk before key assumptions are validated.

Throughout the discussions, participants repeatedly highlighted the importance of faster access to decision-makers, clearer ownership structures, and more agile processes capable of maintaining momentum from early dialogue to operational agreements.

Challenges / Barriers

- Unclear or outdated requirements from end users
- Slow decision-making and lack of authority
- Excessive internal and external compliance processes
- Imbalance between over-commitment and under-commitment

Opportunities Identified

- Faster access to decision-makers and streamlined governance
- Improved understanding of end-user needs and military problems
- Phased collaboration models (explore fast, execute decisively)
- Prioritization of high-impact, relevant problem areas

Strategic Reflection

The discussions in this track highlight a systemic challenge within the defense innovation ecosystem: collaboration mechanisms have not evolved at the same pace as technological and geopolitical demands. In a Nordic and broader European context, the ability to create trust-based, scalable, and fast-moving partnerships will be a defining factor in maintaining competitiveness and security.

Bridging the gap between large institutions, agile startups, and public sector demand requires not only structural changes, such as new partnership models and consortium frameworks, but also cultural shifts

toward faster decision-making, greater transparency, and shared risk. Ultimately, strengthening these collaboration dynamics is critical to unlocking the full potential of the defense innovation ecosystem.

Track 7 – Nordic Infrastructure and Testbeds

Session Topics

1. What is needed to increase the industrial use of academic testbeds?
2. What is needed for companies to navigate to the right facilities or partners?
3. What testbed access initiative should be launched / are missing?

This track explored how Nordic testbed infrastructure can better support defense innovation by improving accessibility, coordination, and usability across industry, academia, and government. Discussions centered on enabling faster development cycles, increasing SME participation, and strengthening cross-border collaboration to ensure the Nordics remain competitive and resilient in a rapidly evolving defense landscape.

Key Message

To accelerate defense innovation, the Nordic ecosystem must move from fragmented and opaque testbed access toward a coordinated, transparent, and SME-inclusive system that enables rapid testing and cross-border collaboration.

Across all discussions, participants emphasized that testbeds and experimentation environments are becoming increasingly important for defense innovation, resilience, and industrial competitiveness. At the same time, many argued that existing infrastructure remains difficult to navigate, fragmented across countries and organizations, and often inaccessible for startups and SMEs due to cost, bureaucracy, and lack of transparency.

A recurring theme was the need for greater Nordic coordination. Participants repeatedly highlighted that many of the barriers related to testbeds, such as transport restrictions, differing regulations, and duplicated infrastructure, cannot be solved nationally alone. Instead, stronger cross-border collaboration and shared Nordic strategies were identified as essential for creating more efficient and scalable innovation environments.

Another major discussion centered around accessibility and visibility. Participants stressed that many companies, particularly startups and SMEs, simply do not know what facilities exist, how to access them, or what regulations apply. Mapping existing infrastructure, clarifying pathways into testing environments, and creating guidance structures were therefore repeatedly identified as critical priorities.

The discussions also highlighted the tension between civilian and defense-oriented infrastructure. Many existing testbeds were originally designed for civilian purposes and are not fully adapted for defense applications, creating limitations around security, operational relevance, and testing capabilities for emerging defense technologies such as drones, jamming systems, AI, and electronic warfare. Participants, particularly from more established industrial actors, also highlighted that regulations in sectors such as telecommunications and aviation can make it difficult to establish realistic testing environments. Examples raised included strict restrictions on jamming activities in Sweden, as well as regulatory limitations surrounding drone testing and operations. While these regulations serve important safety and

security purposes, participants argued that they can also hinder experimentation, capability development, and the creation of testbeds needed to accelerate innovation and operational readiness.

Key Takeaways

1. Accessibility, not availability, is the core bottleneck

While many testbeds already exist across the Nordic region, participants emphasized that access is uneven, unclear, and often dependent on networks rather than structured pathways. SMEs in particular face challenges related to cost, awareness, and administrative complexity, which limits their ability to test and scale innovations.

Improving access requires both transparency (mapping available facilities) and practical support mechanisms such as vouchers, guidance, and simplified processes. Without addressing access barriers, existing infrastructure will remain underutilized and innovation cycles will stay slow.

2. Regulatory and cross-border friction undermines Nordic collaboration

A major recurring barrier is the difficulty of collaborating across borders due to export controls, transport restrictions, and differing national regulations. These limitations not only slow testing processes but also discourage companies from utilizing Nordic or European facilities altogether.

Addressing these regulatory inconsistencies is critical to unlocking true Nordic cooperation. Without more harmonized and flexible frameworks, the region risks fragmentation and reduced competitiveness compared to more agile ecosystems globally.

3. A coordinated ecosystem approach is needed to support SMEs and speed

There is a clear need for a more structured, ecosystem-wide approach to guiding companies, particularly startups, through testbed environments. Discussions highlighted the importance of defined pathways, stronger industry involvement, and closer collaboration between large companies, SMEs, academia, and defense end-users.

At the same time, agility and flexibility must be preserved. Rather than rigid processes, the system should combine guidance with optionality, allowing companies to iterate quickly and choose testing environments aligned with their development stage and technology readiness level (TRL).

Main Discussion Themes

Theme 1: Access, Transparency, and Navigation

Discussion Summary

A central issue across all sessions was not the lack of testbeds, but the inability to effectively navigate and utilize them. There is limited visibility into what facilities exist, what they offer, and how to access them. This creates an environment where well-connected actors benefit disproportionately, while SMEs struggle to identify and reach relevant testing infrastructure.

Participants emphasized the need for systematic mapping of testbeds across the Nordics, including clear information on capabilities, pricing, and regulatory conditions. In addition, there is a need for guidance mechanisms that help companies move through different test environments as their products mature, reducing friction and accelerating development cycles.

There was also discussion on defining what constitutes a testbed, highlighting the current ambiguity between facilities, services, and research environments, which complicates strategic planning and communication across stakeholders.

Challenges / Barriers

- Low awareness and visibility of available testbeds
- High pricing and limited accessibility for SMEs
- Difficult navigation and reliance on informal networks for access
- Unclear definitions and lack of standardization of “testbeds”

Opportunities Identified

- Nordic-wide mapping of testbed infrastructure
- Shared overview of pricing, regulations, and access pathways
- Better guidance systems for startups and SMEs
- Increased transparency around capabilities and specialization
- Stronger coordination between industry, academia, and governments

Theme 2: Regulatory and Structural Friction

Discussion Summary

Regulatory barriers emerged as one of the most critical constraints on effective testbed use. Export controls, restrictions on moving equipment, and differing national rules create significant delays and complexity, particularly in cross-border collaboration.

In addition, working with classified materials introduces further limitations, restricting collaboration with academia and limiting access to talent. These constraints force some companies to operate in unclassified environments, potentially reducing the relevance of testing outcomes.

More broadly, the ecosystem is affected by misaligned incentives and fragmented governance structures, resulting in slow processes and reduced agility compared to faster-moving global competitors.

Challenges / Barriers

- Export control and transport restrictions across borders
- Regulatory fragmentation between Nordic countries
- Constraints related to classified environments and security clearance

Opportunities Identified

- Harmonize Nordic regulations for testbed collaboration
- Introduce more flexible regulatory frameworks for testing activities
- Improve transparency around rules and compliance requirements

Theme 3: Inclusion, Cost, and Ecosystem Collaboration

Discussion Summary

A persistent structural imbalance exists between large defense companies and SMEs. Larger actors benefit from established networks and internal test capabilities, while smaller companies face high costs, limited access, and insufficient support.

Cost was consistently highlighted as a major barrier, with high testbed pricing and limited funding mechanisms disproportionately affecting startups. Proposed solutions included voucher systems, subsidized access, and stronger industry involvement in providing access to existing facilities.

Collaboration between large companies and SMEs was seen as a key enabler, particularly if larger actors can open their facilities and provide guidance. At the same time, there is a need to ensure that testbed capacity is not monopolized by large projects, leaving smaller actors without access.

Challenges / Barriers

- High cost of testbed access, especially for SMEs
- Unequal access between large companies and startups
- Capacity constraints and prioritization challenges

Opportunities Identified

- Introduce voucher systems and financial support mechanisms
- Leverage large company infrastructure for SME access
- Strengthen collaboration models across industry, academia, and defense

Strategic Reflection

The discussions in Track 7 demonstrated that testbeds and infrastructure are becoming increasingly strategic assets within defense innovation ecosystems. While the Nordics already possess significant technical capabilities and testing environments, fragmentation, accessibility challenges, and regulatory complexity currently limit their full utilization.

A central insight was that startups and SMEs face structural disadvantages within the current system. Despite often driving innovation and experimentation, smaller actors struggle to access the infrastructure, funding, and operational environments necessary to scale technologies effectively.

The sessions also highlighted that future competitiveness will likely depend on stronger Nordic coordination and specialization. Rather than duplicating infrastructure nationally, participants repeatedly

emphasized the importance of creating interconnected Nordic ecosystems capable of sharing facilities, harmonizing regulations, and building complementary capabilities.

Finally, the discussions suggested that increasing visibility, accessibility, and operational relevance of testbeds may be one of the most important enabling factors for accelerating defense innovation cycles, improving resilience, and strengthening long-term industrial capability development across the Nordics.

CONCLUSION

Defense Day 2026 demonstrated both the strengths and the structural challenges currently shaping the Nordic and European defense innovation ecosystem. Across all seven tracks, participants consistently highlighted that the Greater Copenhagen region possesses strong technological capabilities, highly competent actors, and a growing willingness to collaborate across sectors. However, these strengths remain constrained by fragmentation, slow-moving systems, limited coordination, and structural barriers that reduce speed, scalability, and operational impact.

One of the clearest conclusions throughout the discussions was that the primary bottlenecks are rarely technological. Instead, the main constraints relate to procurement systems, organizational culture, regulatory complexity, access to networks, and the ability to coordinate actors across the ecosystem. While Innovation is present, pathways from idea to operational deployment remain unclear, fragmented, and difficult to navigate, particularly for startups and SMEs.

The discussions also revealed a growing recognition that defense capability development can no longer be approached through isolated national or organizational efforts. Across topics such as procurement, testbeds, funding structures, space capabilities, and industrial collaboration, participants repeatedly emphasized the need for more integrated Nordic and European ecosystems. Shared standards, coordinated procurement, stronger collaboration platforms, and interoperable innovation environments were all identified as necessary to achieve the scale and speed required in the current geopolitical environment.

At the same time, trust and relationships emerged as both a strength and a challenge within the ecosystem. Informal networks often accelerate collaboration and enable faster decision-making, but they also risk creating barriers for new entrants and limiting transparency. Several tracks therefore highlighted the importance of creating more structured and accessible collaboration models capable of combining trust-based cooperation with openness and inclusivity.

Another recurring conclusion was the critical role of governments and public actors, not only as regulators and funders, but as active market shapers. Procurement was consistently described as one of the most powerful strategic tools available for accelerating innovation, creating demand, reducing risk, and enabling long-term industrial capability development. Participants emphasized that public actors must increasingly move beyond grant-based innovation support toward acting as strategic customers capable of providing clearer demand signals and long-term direction.

The discussions further highlighted the importance of startups and SMEs within the future defense ecosystem. Smaller actors are often driving experimentation, agility, and technological innovation, yet remain structurally disadvantaged within current systems. Limited access to procurement pathways, funding, testbeds, and established networks continues to slow the scaling of new capabilities. Strengthening support structures for these actors was therefore identified as essential for future competitiveness and resilience.

Across all tracks, there was also a strong sense of urgency. Participants repeatedly referenced the speed of technological and operational development globally, particularly in relation to Ukraine, dual-use innovation, and emerging defense technologies. The ability to shorten innovation cycles, accelerate decision-making, and create more agile collaboration structures was seen as increasingly critical for maintaining relevance and strategic autonomy.

Ultimately, Defense Day 2026 highlighted that strengthening defense innovation is not solely about developing new technologies, it is about building stronger systems around them. The future

competitiveness of the Nordic and European defense ecosystem will depend on the ability to create connected, trusted, and operationally driven innovation environments that combine industry, government, academia, investors, startups, and end users into faster and more integrated ecosystems.

The discussions throughout the day demonstrated a strong willingness among stakeholders to move in this direction. The challenge ahead lies not in identifying the problems, but in creating the structures, incentives, and collaborations required to act on them collectively.

WHAT HAPPENS NOW?

Based on the discussions across all seven tracks, a number of recurring opportunities and action areas emerged. Some of these can be initiated immediately by ecosystem actors, industry, academia, and innovation organizations. Others require longer-term political coordination, policy reform, and structural collaboration across Nordic and European stakeholders.

The recommendations presented below should therefore not be viewed as a complete roadmap, nor as the only way forward. Rather, they represent a collection of opportunities, initiatives, and actions that emerged repeatedly throughout the discussions.

We encourage all stakeholders who see themselves playing a role in any of the suggested actions, or who are already working on similar initiatives, to get involved. The challenges identified throughout Defense Day cannot be solved by any single actor alone. Greater coordination, transparency, and collaboration will be required to move from discussion to implementation.

Likewise, if you believe important actions are missing from this report, we encourage you to contribute your perspectives and continue the conversation. The report is intended to be a starting point for collaboration rather than an endpoint.

Short-Term Actions

1. Create recurring Nordic defense innovation working groups

Suggested actors: Ideon Science Park, Amyna, innovation ecosystems, industry organizations, public actors

One of the strongest messages throughout Defense Day was the need for more continuous dialogue and coordination between ecosystem actors. While events such as Defense Day create valuable momentum, participants repeatedly emphasized the need for operational working groups that can continue discussions and drive concrete initiatives forward.

Ideon Science Park and Amyna are therefore exploring the possibility of establishing recurring Nordic working groups focused on topics such as procurement, innovation collaboration, funding, testbeds, and capability development.

Ideon Science Park is willing to provide a platform and coordination function for such groups and is currently gathering interest from organizations that would like to participate.

Call to action: If you are interested in joining a working group or helping drive a specific topic forward, please complete this [interest form](#) or contact Leonie Blum (leonie.blum@ideonsciencepark.se).

2. Improve visibility of ecosystems, infrastructure, and opportunities

Suggested actors: Innovation clusters, incubators, accelerators, testbeds, public agencies

Throughout the discussions, participants repeatedly highlighted that many valuable resources already exist across the Nordic ecosystem. However, they are often difficult to discover, navigate, and access.

A common recommendation was therefore to create a clearer landscape overview covering:

- Testbeds and experimentation environments
- Funding opportunities
- Innovation programs
- Collaboration platforms
- Operational contacts and matchmaking opportunities

Improving visibility is particularly important for startups and SMEs, which often lack the networks and resources needed to identify relevant opportunities.

Call to action: If your organization operates a testbed, accelerator, funding program, innovation platform, or other relevant initiative, we encourage you to share information so that these resources can become part of future ecosystem mapping efforts.

3. Increase startup and SME access to defense ecosystems

Suggested actors: Governments, primes, accelerators, procurement actors, armed forces

Participants across multiple tracks highlighted the need for simpler and more accessible pathways into the defense ecosystem. This includes access to procurement processes, operational users, testbeds, pilot programs, and validation environments.

One example of such an initiative is the recently established [Lund Rapid Innovation and eExploitation Hub \(LRIX\)](#) at Ideon Science Park. The initiative is led by FMV, Försvarmakten Cyber, Arméstaben, and Södra skånska regementet P7, with support of Totalförsvarets forskningsinstitut (FOI), Förvarshögskolan (FHS) and Vinnova. Ideon Science Park and Amyna serve as the operator and collaboration platform for the initiative in Lund.

The aim is to create a collaborative environment where startups, SMEs, large companies, academia, and defense stakeholders can work more closely together. The ambition is to shorten the distance between identified operational needs and innovative solutions by enabling faster testing, experimentation, and capability development. Through direct access to defense actors, operational users, and testing environments, LRIX seeks to address several of the barriers

highlighted throughout Defense Day, including limited startup access to end users, fragmented collaboration structures, slow innovation cycles, and weak pathways from innovation to operational deployment. The initiative also serves as a pilot for new ways of working between industry, academia, and the defense sector, with a strong emphasis on demand-driven development, rapid iteration, and operational relevance.

At the same time, Ideon Science Park is deepening its cooperation with FORCE Technology to provide companies with enhanced access to testbeds, testing infrastructure, validation services, and specialized engineering capabilities. The partnership aims to reduce barriers between innovation and deployment by enabling companies to validate technologies under realistic conditions. It also reinforces Nordic collaboration within dual-use, defense, space, and advanced technology sectors by connecting Swedish innovation environments with Danish testing and demonstration facilities.

The actions above primarily focus on improving coordination and accessibility within the current system. However, many participants argued that longer-term structural changes will also be required if the Nordics are to increase innovation speed, strengthen industrial competitiveness, and build operational capabilities at scale.

Long-Term Strategic Developments

1. Build integrated Nordic defense innovation ecosystems

The long-term ambition should be to move beyond fragmented national innovation systems toward more integrated Nordic ecosystems.

This includes:

- Shared capability ecosystems
- Coordinated industrial strategies
- Interconnected innovation infrastructures
- Joint operational capability development
- Stronger public-private collaboration mechanisms

Several participants argued that the Nordics already possess many of the required capabilities, but that greater integration is needed to unlock their full potential.

2. Reform procurement as a strategic innovation tool

Many participants described procurement as both the largest bottleneck and the most powerful lever for change.

As highlighted above, LRIX represents one example of how alternative approaches can be explored in practice. Beyond creating a collaboration platform between defense actors, industry,

startups, and academia, LRIX also functions as a pilot initiative for developing new methods of innovation adoption and capability development.

The initiative incorporates principles similar to a Minimum Viable Product (MVP) approach, where solutions are initially tested on a limited scale before being expanded based on demonstrated performance and operational feedback.

Importantly, LRIX is also a method-development initiative. Experiences gathered through the hub are intended to provide practical lessons for future procurement approaches, collaboration models, and technology introduction processes within the defense sector.

If successful, LRIX could provide valuable insights into how procurement systems can evolve from evaluating predefined requirements toward supporting continuous experimentation, capability development, and innovation adoption.

At the same time, participants emphasized that pilot initiatives alone will not be sufficient. Broader policy reforms will be required to enable:

- Faster procurement cycles
- Greater experimentation
- Earlier user involvement
- Stronger demand signals
- Increased willingness to accept calculated risk in pursuit of operational advantage

3. Develop sovereign and strategically coordinated capabilities

Finally, the discussions highlighted that some challenges cannot be addressed solely by ecosystem actors, industry, or innovation organizations.

Areas such as:

- Space
- Artificial Intelligence
- Communications
- Critical infrastructure
- Autonomous systems
- Industrial resilience

require strategic prioritization and long-term governmental involvement.

Participants repeatedly emphasized the need to increase awareness and understanding among policymakers regarding the structural barriers identified throughout the event. The insights gathered through Defense Day should therefore be communicated to relevant governmental actors and used as input to future policy development, procurement strategies, and capability planning.

Furthermore, participants emphasized that sustainable and long-term funding for defense innovation actors, innovation ecosystems, clusters, and intermediary organizations is essential if they are to effectively coordinate stakeholders, facilitate collaboration, and maximize the value created through joint efforts across the triple helix. Without stable structures and dedicated resources for ecosystem building, many of the opportunities identified throughout Defense Day risk remaining fragmented or difficult to scale.

Ultimately, many of the opportunities identified throughout this report depend on political decisions regarding investment priorities, procurement frameworks, regulatory environments, and long-term strategic direction.

The conversations started during Defense Day 2026 should therefore not end with this report. The report should instead be viewed as an invitation to continue the dialogue, and, more importantly, to begin acting on it.

ACKNOWLEDGEMENTS

Defense Day 2026 would not have been possible without the engagement, expertise, and willingness to collaborate demonstrated by all participants throughout the day.

We would like to extend our sincere thanks to all moderators, note-takers, speakers, exhibitors, startups, companies, public sector representatives, researchers, investors, defense stakeholders, and participants who contributed their time, knowledge, and perspectives to the discussions. Your openness, expertise, and commitment were what made the conversations both valuable and actionable.

A special thank you go to the moderators and note-takers who helped facilitate and capture the insights from the 21 sessions. Your efforts have been essential in enabling the discussions to be documented and transformed into the findings and recommendations presented in this report.

We would also like to thank all participating organizations from industry, government, academia, civil society, and the defense sector. The diversity of perspectives represented throughout the day was one of the event's greatest strengths and demonstrated the importance of cross-sector collaboration in addressing the challenges and opportunities facing the defense innovation ecosystem.

Special thanks also go to our sponsors, partners, and supporting organizations (Vinge, SRS, Saab, Region Skåne, Hansson Thyresson, AWA, DEFINE, FORCE Technology) whose commitment made Defense Day 2026 possible. Through your support, we were able to create a platform where ideas, experiences, challenges, and opportunities could be shared across traditional organizational and sector boundaries.

Finally, we would like to thank everyone who continues the work beyond the event itself. Defense Day was never intended to be a one-day conversation. Rather, it is part of a broader effort to strengthen collaboration, accelerate innovation, and build stronger connections between the many actors working to enhance resilience, security, and capability development across Sweden, the Nordics, and Europe.

Encouragingly, several of the conversations initiated during Defense Day have already translated into concrete action. At the time of writing, we are aware of more than five new initiatives, collaborations, and follow-on activities that have been launched as a direct result of connections and discussions made during the event. While many of these efforts are still in their early stages, they demonstrate the value of bringing together stakeholders from across the ecosystem. We look forward to sharing the progress and outcomes of these initiatives at Defense Day 2027.

We hope that the discussions, relationships, and ideas generated during Defense Day 2026 will continue to develop into new collaborations, initiatives, and tangible outcomes in the months and years ahead.

Thank you for being part of Defense Day 2026!

A handwritten signature in black ink, appearing to read 'Johan Vaernholt', with a stylized, flowing script.

Johan Vaernholt on behalf of Ideon Science Park