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First interim evaluation of Business Finland missions

Part 2 – Evaluation of the Digital Native Mission Finland

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Foreword

Business Finland decided to implement missions approach when entering its latest strategy period (2020–2025). With missions, Business Finland aimed to accelerate systemic change and help solve major global challenges, while creating value for society on a broad scale and identifying significant future market opportunities for Finnish companies.

Business Finland's missions were selected from sectors that are experiencing significant global changes so that they can provide significant opportunities for Finnish companies in the markets of future. They combined long-term strategic forecasting with assisting companies. Missions were playing a strong role in Business Finland's programmatic work, as all programmes operated under the umbrella of missions. Thus, programmes had a key role in implementing missions.

The Digital Native Finland mission had the goal of accelerating digital transformation and creating global competitive advantage for Finnish companies. The mission was seen to increase sustainable customer value and raise the productivity of companies to the next level, by means of increasing digital capabilities. Investing in the connectivity and data economy of the future together with the development of software expertise were to provide Finnish export companies with competitive advantage, while also attracting foreign investments.

The purpose of this study was to produce the first interim evaluation of the mission Digital Native Finland that started on December 2021. A goal was to assess how well this mission is progressing toward its objectives, identifying what is working effectively and where improvements are needed. This includes evaluating the mission as a strategic tool for Business Finland and examining the added value it brings.

The evaluation questions were grouped into three main categories. The first focused on assessing the overall strategic use of missions as a tool by Business Finland. The second addressed the concept of additionality, based on the Mission Impact Additionality model. The third examined the extent to which programmes and campaigns are effectively advancing the missions.

The evaluation team of 4Front Oy and Technopolis B.V. carried out this evaluation. Business Finland wishes to thank the evaluators for their thorough and systematic approach. Business Finland expresses its gratitude to the steering group and all others who have contributed to the study.

Helsinki, February 2026
Business Finland

Executive summary

This evaluation assessed the progress, effectiveness, and strategic value of the Digital Native Finland (DNF) mission of Business Finland. The evaluation covered the mission itself, its associated programmes and campaigns, and their alignment with Business Finland's broader strategic objectives for 2020–2025.

The evaluation was interim in nature: all programmes were in the middle of their implementation period, whereas the two campaigns were set to conclude in 2025, allowing for a partial assessment of their results. The evaluation was conducted in parallel with the evaluation of the Zero Carbon Future mission, with joint findings reported separately.

Strategic use and implementation of the mission

Based on the evaluation, the DNF Mission has helped align digitalisation-related programmes and campaigns under shared goals, supporting Business Finland's strategic direction. However, practical implementation and alignment with Business Finland's structures remain complex.

The DNF Mission has demonstrated responsiveness to external changes, such as launching the GenAI Campaign and integrating defence topics into the Defence and Digital Resilience Programme.

The mission has fostered collaboration and long-term planning, but systemic transformation is constrained by limited resources, lack of operational authority, and absence of system-level tools for experimentation.

Additionality of the mission

The mission model has clarified thematic priorities and encouraged strategic programme development. It has also fostered new forms of collaboration and broke down organisational silos.

The DNF Mission is seen as a relevant strategic framework by stakeholders, providing continuity and coherence for Business Finland's work in digitalisation. It has contributed to national policy initiatives (e.g., Data Economy Roadmap, Digital Compass) and positioned Finland internationally in emerging technologies.

For most companies and research actors, the mission remains abstract and distant; engagement is primarily through specific programmes or campaigns. Awareness of the overarching mission structure is low, and terminology ("mission", "programme", "campaign") is often confusing.

Programme and campaign effectiveness

The DNF Mission has channelled EUR 257 million across its programmes and campaigns, with the majority directed to large companies, especially in technology-oriented initiatives. SMEs face challenges accessing suitable instruments due to discontinuation of early-stage funding tools.

Events, workshops, and delegations are valued, but participation is limited—most beneficiaries do not engage beyond funding. Active participants report greater benefits, including networking and increased visibility.

Business Finland is recognised as an enabler and facilitator, rather than a primary driver of technological trends. Collaboration with established industry and research ecosystems is a key strength.

Thematic alignment

The text mining shows the DNF Mission formalised an existing focus within Business Finland rather than redirecting the portfolio. Digitalisation themes overlap with other missions, and external shocks (e.g., COVID-19, AI breakthroughs, geopolitical events) drive shifts in the portfolio more than the mission itself.

Programme-specific findings

- **6G Bridge:** Strategically important but perceived mainly as a funding instrument; calls for more cross-sector pilots.
- **Data Economy:** Highly relevant, supports national/EU priorities; needs more visibility and SME-friendly tools.
- **Defence & Digital Resilience:** Timely and relevant, but defence focus may overshadow resilience; resource constraints noted.
- **GenAI Campaign:** Agile and responsive, but short-term; needs sustained support and cross-programme connections.
- **Quantum Computing:** Well-focused, complements hardware ecosystem; calls for more cross-disciplinary experimentation.

Conclusions

The DNF Mission has generated internal added value, fostering collaboration and thematic alignment. However, strategic alignment within Business Finland is complex due to mission's ambiguous roles, lack of formal authority, and resource constraints.

The DNF Mission is valued as a strategic umbrella, supporting policy dialogue and international positioning. Yet, its operational impact is limited, and most beneficiaries experience little direct benefit from the mission layer.

Implementation relies on individual leadership and informal networks. Integration with funding instruments is inconsistent, and SMEs struggle with access to early-stage support.

The DNF Mission formalised pre-existing priorities rather than driving new ones. External developments, not the mission itself, have shaped the shifts in the portfolio.

Programmes and campaigns are timely and relevant but suffer from limited engagement and visibility among beneficiaries. Business Finland's role as an enabler is clear, but more active communication and hands-on support are needed.

Recommendations

1. **Sustain long-term focus on digitalisation as a national competitiveness priority.** Continue to champion digitalisation, data economy, AI, 6G, quantum, and resilience as national competitiveness priorities, regardless of changes to the mission model.
2. **Enhance Business Finland's role as an enabler of ecosystem-driven digital innovation**. Systematically co-develop activities and partnerships with leading industry and research networks. Use structured ecosystem partnerships, advisory boards, and shared experimentation platforms.
3. **Maintain Business Finland's contribution to policy dialogue and agenda-setting in digital fields.** Remain active in shaping national and EU-level policy narratives, linking policy objectives with concrete programmes and company-level actions.
4. **Expand hands-on, experimentation-oriented activities within programmes.** Integrate rapid pilots, prototyping, joint testing environments, and sandbox facilities into programmes, especially in fast-moving areas like AI.
5. **Refine the LCI (Veturi) instrument to better accommodate different digital industry structures.** Adapt the LCI or create complementary mechanisms for sectors with fragmented industry structures (e.g., software, data-driven industries), enabling ecosystem development without relying on a single dominant company.

6. **Address funding gaps that hinder early-stage digital innovation.** Reinstate or replace discontinued instruments (Tempo, Explorer, NIY) to support SMEs and emerging digital companies with light, fast mechanisms for experimentation and capability-building.
7. **Strengthen programme identity and clarify the link between funding and programme participation.** Clarify the distinction between funding allocation and programme participation. Explicitly onboard beneficiaries into programme activities and communicate the benefits of participation.
8. **Maintain coordination across programmes to reduce fragmentation and leverage synergies.** Prevent fragmentation by coordinating planning, KPIs, peer learning, and joint activities across programmes and campaigns, leveraging synergies in digital themes.

1. Introduction

Background and objective of the evaluation

Big societal changes such as digital transformation, require policy responses that aim for systemic changes. Mission-oriented innovation policy has become an increasingly popular policy approach to address complex societal challenges providing long term visions and ambitions goals with transformative impact.[1]

With the introduction of its strategy for 2020–2025, Business Finland (BF) adopted the mission concept in 2021 and launched two pilot missions: Digital Native Finland and Zero Carbon Future. The missions were planned to be thematic steering mechanisms for systemic change and market formation. Key part of the missions are the programmes and campaigns, which operate under the missions.

The goal of the Digital Native Finland mission has been to accelerate digital transformation in Finnish companies to improve their global competitiveness. It has included the following programme and campaign activities: the 6G Bridge Programme, the Data Economy Programme, the Defence and

1 E.g. OECD. Mission-oriented innovation. https://www.oecd.org/en/topics/sub-issues/mission-oriented-innovation.html.

Digital Resilience Programme, the Generative AI Campaign and the Quantum Computing Campaign.

The purpose of this interim evaluation was to assess how well the Digital Native Finland mission, and its programmes and campaigns, are progressing towards their objectives, identifying what is working effectively and where improvements are needed, as well as to evaluate the mission as a strategic tool for Business Finland. The evaluation of the Digital Native Finland mission was carried out in parallel to the interim evaluation of the Zero Carbon Future mission and its programmes.

At the time of the evaluation, all programmes were mid-implementation, highlighting its interim nature, whereas the two campaigns were due to conclude in 2025, enabling an assessment of their results.

This report presents the findings of interim evaluation the Digital Native Finland mission and related programmes and campaigns. The Zero Carbon Future mission is reported separately, while the joint findings and conclusions of the two evaluations at the mission level are reported on separate, joint report of the Business Finland mission concept.

Evaluation framework

The approach for the impact study is based on combining the Business Finland impact model with the frameworks for understanding societal transformations, highlighting the mission additionality on the different levels of societal transformation.[2]

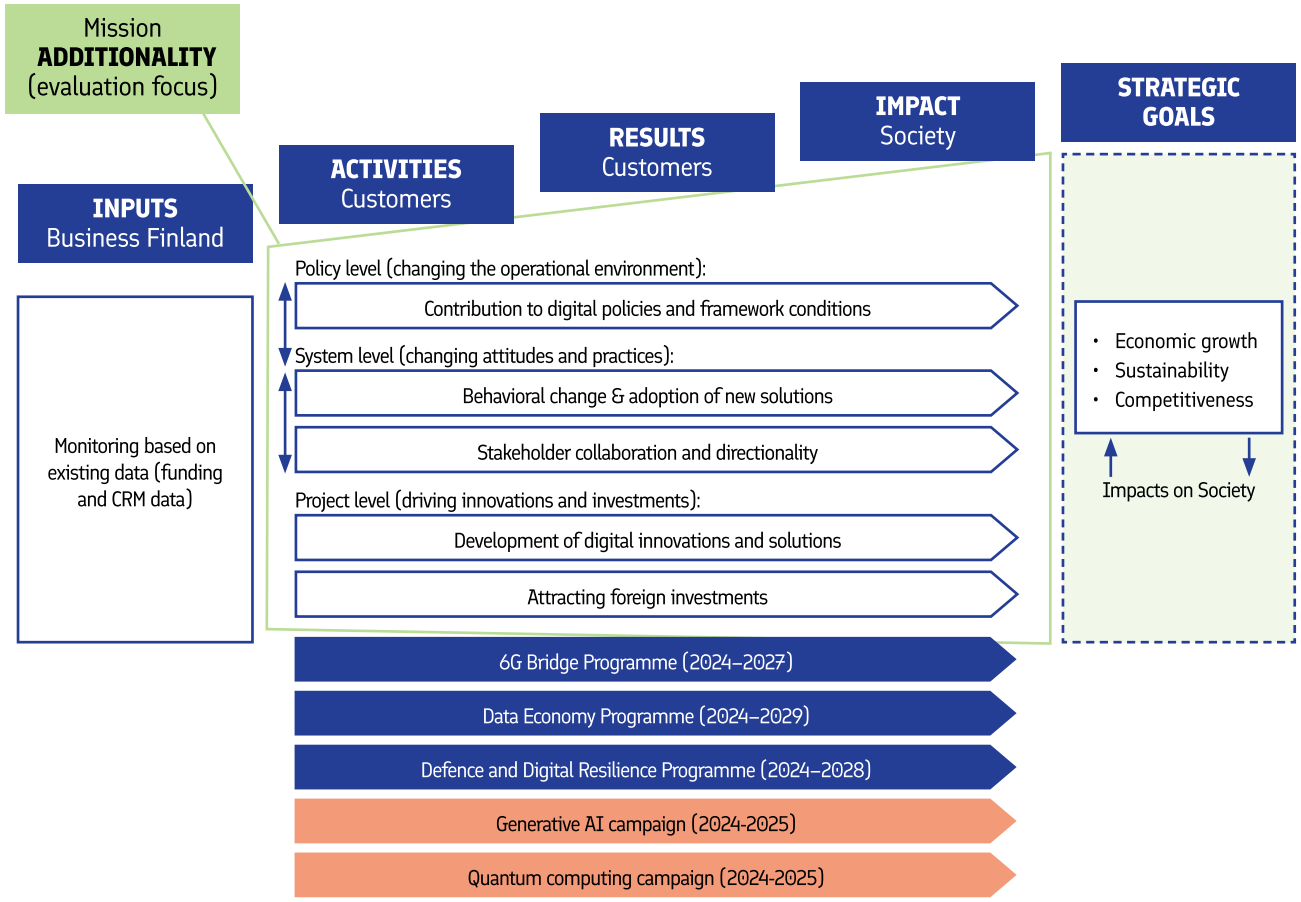


Figure 1. Impact model for the interim evaluation of the Digital Native Finland mission.

2 E.g. Geels, F. W. (2002) Technological transitions as evolutionary configuration processes: A multi-level perspective and a case-study. Research policy, 31(8/9), 1257–1274; Geels, F. & Schot, J. (2007) Typology of Sociotechnical Transition Pathways. Research Policy. 36. 399–417.

Methodology and data sources

The methodological approach of the evaluation was based on a combination of quantitative data analyses, qualitative analysis methods, as well as participatory approaches.

- **Document analysis** covered extensively Business Finland strategies, plans, annual reports, and other documentation about the mission, programmes, and campaigns, as well as information about the relevant national level strategies, policies, and processes, and Business Finland's role in contribution to the operational environment.
- **Literature review and international examples** focused on understanding the role of missions and their additionality, and to identify international trends and practices in the strategic use of missions. The reviews covered recent academic and grey literature regarding mission-oriented innovation policies (MOIPs) and their implementation, challenges, monitoring of impact, etc.[3] In addition, international examples of mission-oriented innovation policies and programmes in other countries were analysed and compared with Business Finland missions to provide insights for the implementation of missions within Business Finland in the future.
- **Analysis of Business Finland funding and service portfolio** included the analysis of Business Finland project funding and CRM data to provide evidence and insights on how the mission has been implemented through the programmes and campaigns, and what kind of instruments and services have been used.
- **Advanced data analyses.** Text mining was used to analyse the project portfolio on alignment and contribution to the Digital Native Finland mission. The analysis was based on textual information available for Business Finland projects funded between 2016 and 2025, including public abstracts and, where available, proposals and progress reports. These materials were used as input for an AI classification pipeline that classified each project in the following three classifications: 1) Missions, 2) the DNF Mission goals, and 3) Programmes and campaigns under the DNF Mission. Each of these classifications was operationalised based on a short definition found in the Business Finland documentation. The methodology and scripts for implementing the classification pipeline were developed by the evaluation team after which they were shared with the Business Finland data team that applied them within their secure environment and only the resulting classifications were shared with the evaluation team. In this way no project level confidential information was shared outside Business Finland. A more detailed description of the methodology is provided in Chapter 3.3.
- **Interviews with Business Finland experts** provided insights and evidence on how the missions have been implemented with Business Finland, and what has been the added value of missions to programmatic work and thematic strategy within Business Finland. In total of 13 interviews with Business Finland experts were conducted (seven joint interviews with the parallel Zero Carbon Future evaluation).
- **Internal co-creation workshop** with Business Finland experts was organised jointly with the parallel evaluation to discuss and validate findings and conclusions and lessons for implementing the missions and/or thematic priorities within Business Finland in the future.
- **Interviews with external stakeholders** included interviews with 12 experts representing key stakeholders and Business Finland collaborators. The interviews focused on the role of Business Finland and the DNF Mission in supporting the

3 E.g. OECD. Mission-oriented innovation. https://www.oecd.org/en/topics/sub-issues/mission-oriented-innovation.html and related publications.

broader operational environment around digitalisation. The interviews included experts from the Ministry of Employment and Economy, Sitra, Technology Industries of Finland, Confederation of Finnish Industries, and Finnish Information Society Development Centre TIEKE, AI Finland, Software Finland, and 6G Finland.

- **Interviews with programme beneficiaries** included interviews with 23 programme/campaign beneficiaries of which 18 were companies and five research organisations, representing participants from all three programmes and two campaigns (several interviews covered multiple programmes/campaigns). The interviews provided inputs and evidence especially on the relevance and added value of mission, programme and campaign activities.

A summary of the evaluation questions and primary data sources and methods is depicted in Table 1.

Table 1. Evaluation matrix. ++ = Primary method, + = Secondary method.

LEVEL	EVALUATION QUESTIONS (SUMMARY)	LITERATURE REVIEW AND INTERNATIONAL EXAMPLES	BUSINESS FINLAND FUNDING AND SERVICE DATA	NLP & AI TOOLS	BUSINESS FINLAND INTERVIEWS AND WORKSHOP	STAKEHOLDER INTERVIEWS AND WS	DOCUMENT ANALYSIS
1) Strategic use of missions	How well do missions function as a tool for strategic steering in Business Finland?	+	+	++	++	+	++
	Has the mission been able to respond to changes in the operational environment, such as geopolitical shifts?	++	+	+	+	++	+
	Has the mission approach been effective in driving the desired systemic change / transformation?	+	+	+	++	++	+
	Input additionality (added value of stakeholder collaboration, mobilisation of resources, alignment of Business Finland instruments...)?	-	+	++	++	++	+
2) Mission additionality	Additionality in changing attitudes and practices (behavioural change among customers and other stakeholders)?	-	+	++	+	++	+
	Additionality in driving developments in innovations, investments and business?	-	+	+	+	++	++
	Added value of the mission to programmatic work?	-	++	++	++	+	+
	Interim evaluation of programmes: Relevance of services, direction and goals?	-	+	+	+	++	+
3) Programmes and campaigns	How well are the programmes and campaigns supporting the transformation the mission is aiming at? What could be improved?	+	+	+	++	+	+
	How to develop thematic work within Business Finland (programmes and campaigns as part of missions)?	+	+	+	++	+	+

2. Digital Native Finland mission

2.1. Overview of the Digital Native Finland mission

This section focuses on the Digital Native Finland (DNF) mission. The overall mission concept and its background have been described in more detail in the joint report of the interim evaluation of two pilot missions (the Digital Native Finland mission and the Zero Carbon Future mission), published as a separate document.

Background of the mission concept in Business Finland

In line with the international trends and emphasis of mission-oriented innovation policies (see Appendix 2), Business Finland decided to implement mission approach as part of its strategy period for 2020–2025.

Business Finland adopted the mission concept in 2021. In 2022 the concept and its related practices were further clarified and developed. Currently, Business Finland has five missions. The first two missions (Digital Native Finland and Zero Carbon Future) were launched in December 2021. The three latter missions (Circular Transition for Zero

Waste, Healthcare reimagined, and Immersive Digital Life) were launched in May 2023.

With missions, Business Finland aims to accelerate systemic change and help solve major global challenges, while creating value for society as well as identifying future market opportunities for Finnish companies. Behind this development was the need to clarify Business Finland's role in driving systemic change and renewal. The organisation also aimed to establish itself as a thought leader within its chosen focus areas. Another goal was to make more effective use of Business Finland's thematic strategy.

Mission goals

At its launch, the DNF Mission had the goal of accelerating digital transformation and creating global competitive advantage for Finnish companies. The mission was seen as a means to increase sustainable customer value and to raise the productivity of companies to the next level, by means of increasing digital capabilities. Investing in the future connectivity and data economy, together with developing software expertise, was intended to give Finnish export companies a competitive advantage while also attracting foreign investments.

Since its launch, the mission goals have been further refined and clarified. Currently the main goal of the mission is to aim for "systemic breakthroughs in digital transformation towards global competitiveness for a robust digital society". The mission has three focus areas:

1. Digital transformation of business,
2. Critical technologies, services and solutions for advanced digitalisation, and
3. Global digital collaboration.

Each of these focus areas have a set of sub-goals grouped into three categories reflecting the three impact paths of the Business Finland impact model for missions (Figure 2): a) Business, innovations, investments, b) Operational environment, c) Attitudes & practices. The goals, focus areas and subgoals are presented in a later section.

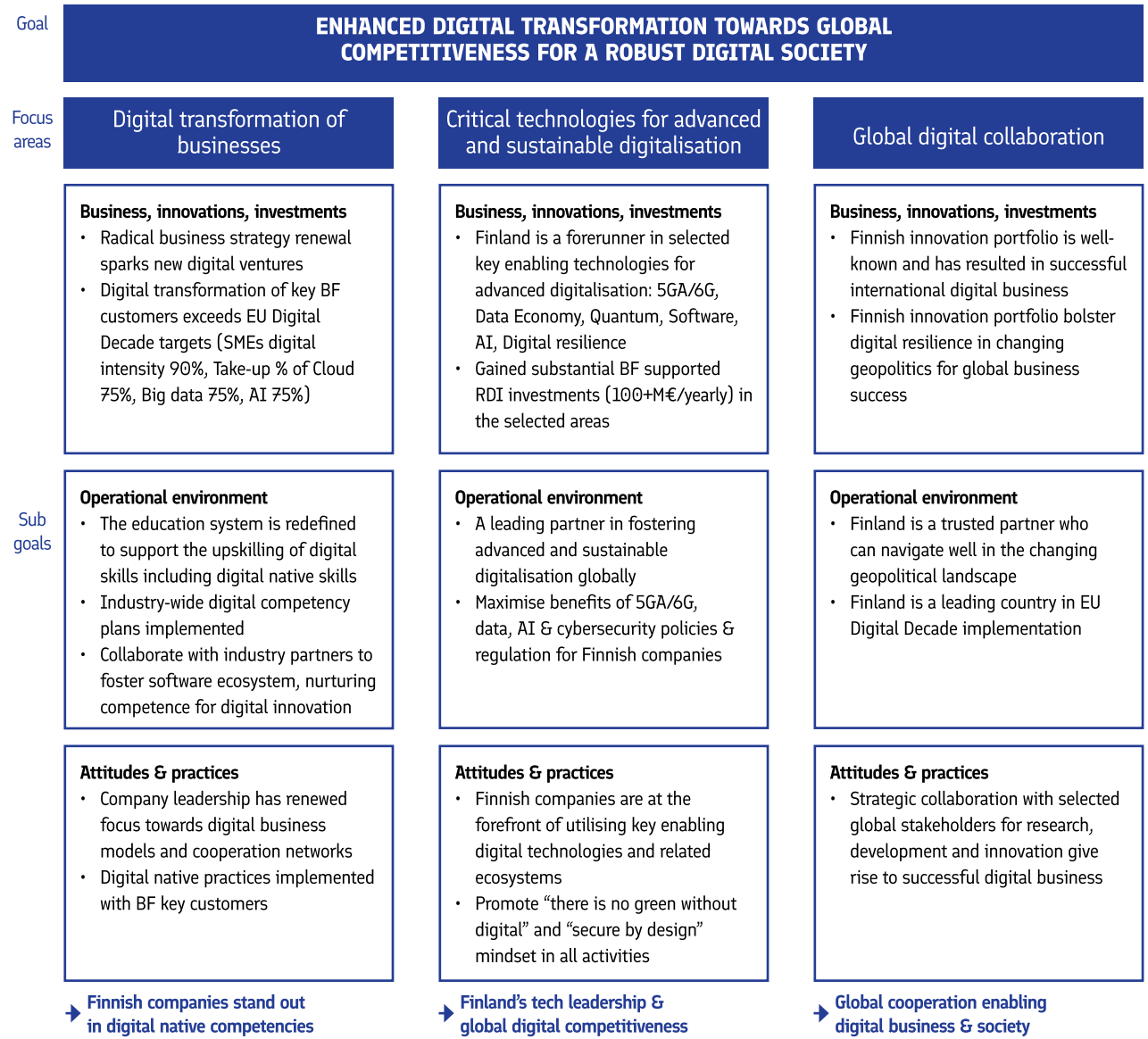


Figure 2. Goals, focus areas and sub-goals of the Digital Native Finland mission. Source: Business Finland.

Mission roadmap, milestones and KPIs

A key tool for mission management is the mission roadmap. The roadmap provides the strategic backbone for implementing the Digital Native Finland mission. It translates the mission's long-term ambition into a sequenced pathway of milestones, annual priorities and concrete actions.

Each year, Business Finland prepares mission-level updates and action plans that align with the roadmap's trajectory. Progress is monitored through a set of KPIs that track both programme-level performance and system-level outcomes, including visibility, investment volumes and impacts on digital transformation across Finnish firms. For example, in 2025, the key actions have emphasised continuity in core programme delivery while expanding targeted interventions in emerging technology areas. Priorities include advancing ongoing programmes of 6G Bridge, Data Economy and Digital Resilience; preparing new activation campaigns, notably in AI and quantum technologies; strengthening the domestic software ecosystem; and supporting customer adaptation to new EU digital regulation. The mission has also placed emphasis on deepening international R&D collaboration and directing efforts towards countries that align with Finland's strategic technology focus.

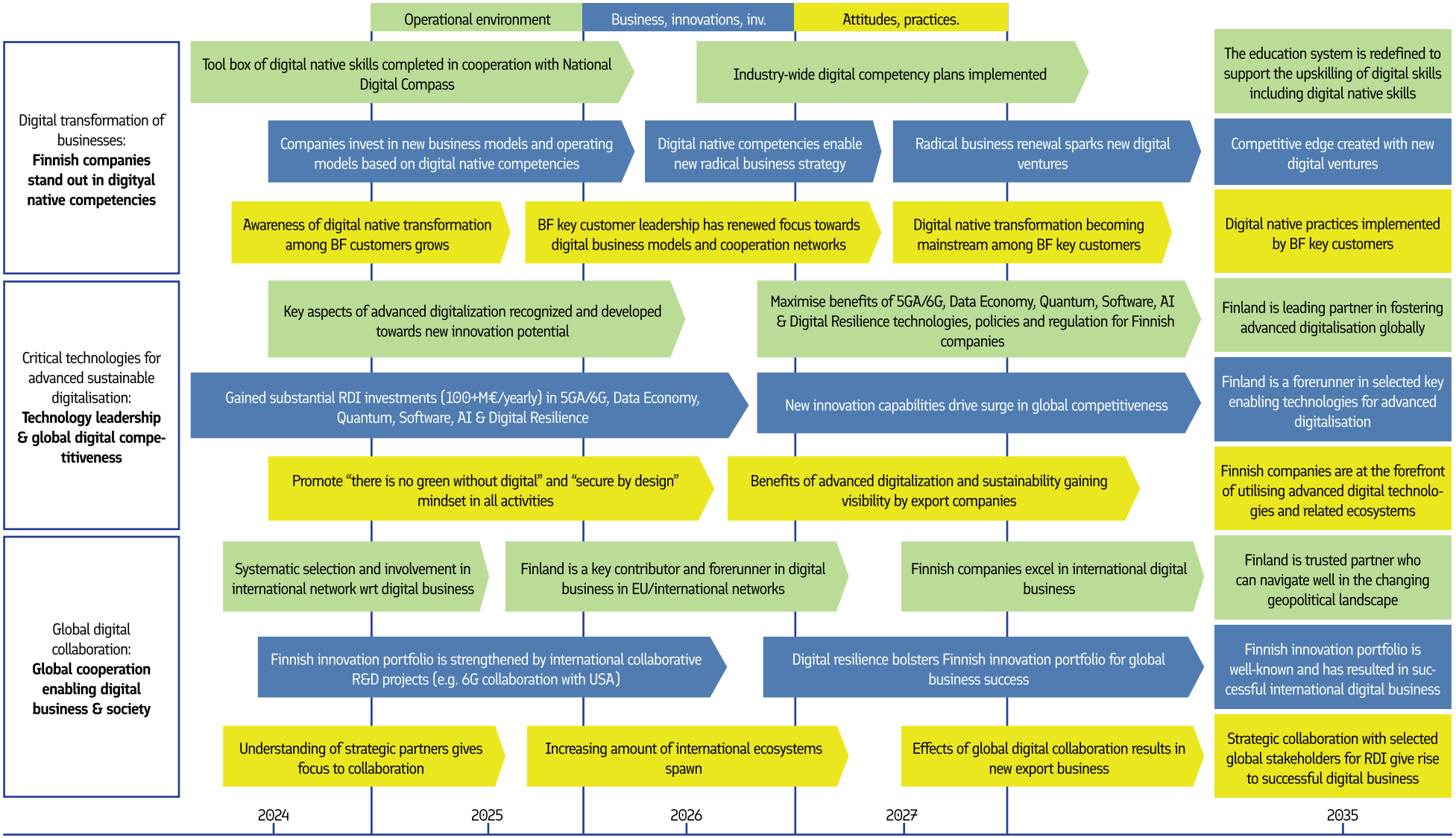
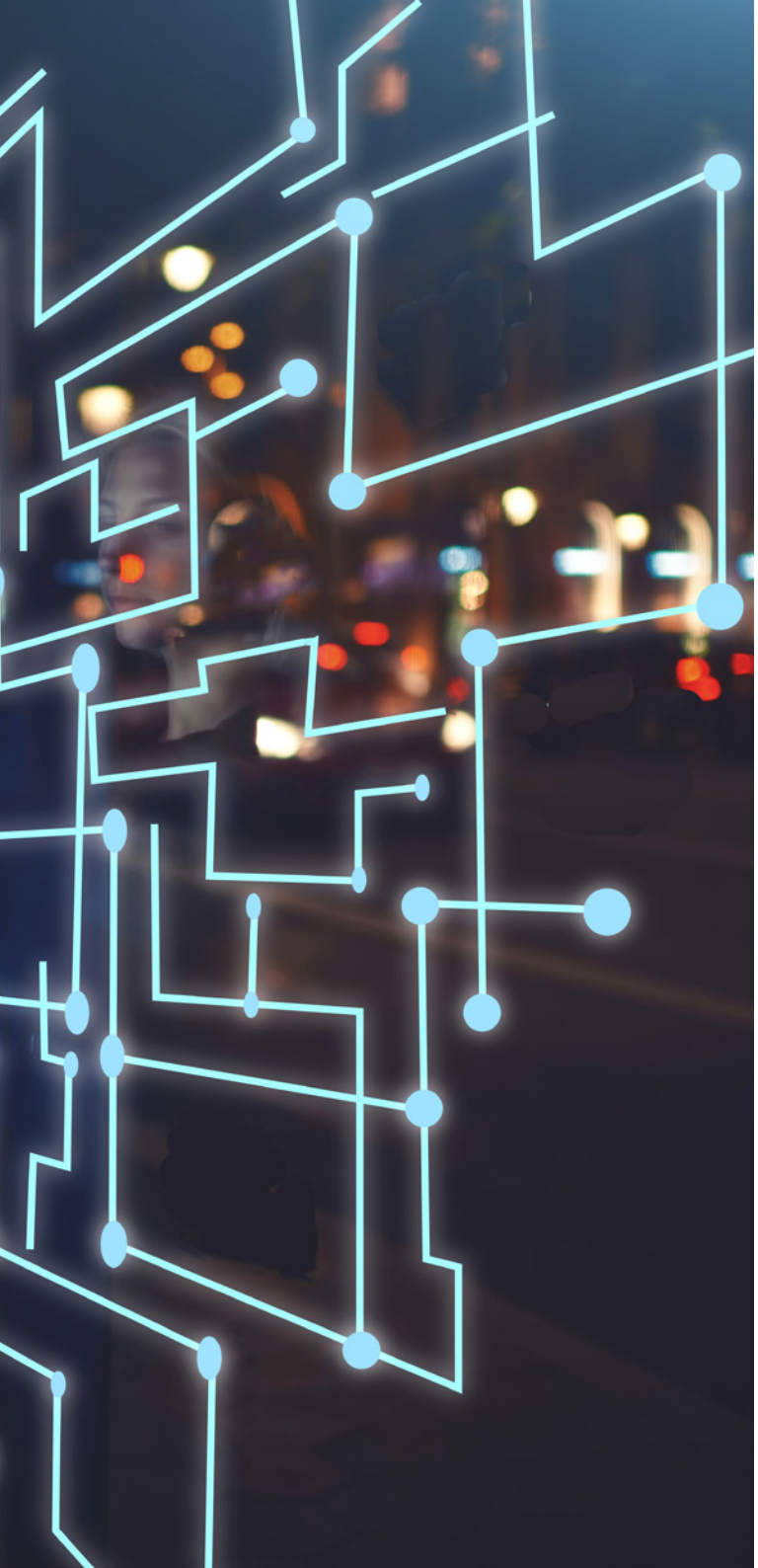


Figure 3. The Digital Native Finland Roadmap with main milestones. Source: Business Finland



Mission implementation

The mission is organised around a dedicated Mission Lead who is responsible for steering strategic direction and ensuring coherence across programmes and activities. A key part of this role is to actively "market" the mission both inside Business Finland and externally, building visibility, securing commitment and articulating the mission's value to different stakeholder groups. The Mission Lead also has a key role in initiating new programmes under the mission, participating in programme steering groups to ensure alignment with mission objectives, and convening regular meetings with programme managers to coordinate implementation and monitor progress. The mission does not have its own dedicated budget or funding authority; instead, it relies on existing programme resources and organisational structures to advance its goals.

The mission is further supported by an Advisory Board composed of representatives from companies, research organisations and other key stakeholders. This group advises the Mission Lead on the development of activities, provides insight on emerging needs and opportunities, and helps ensure that mission priorities remain relevant to key beneficiaries and stakeholders.

2.2. Programmes and campaigns under the Digital Native Finland mission

Programmes and campaigns are the key (although not the only) means for Business Finland's missions for achieving their targets, and each programme and campaign belongs to one mission. The Digital Native Finland mission consists of the following programmes and campaigns:

- 6G Bridge Programme
- Data Economy Programme
- Defence and Digital Resilience Programme
- Generative AI Campaign
- Quantum Computing Campaign

Figure 4 illustrates the timeline of the DNF Mission and related programmes and campaigns.

The objectives, key themes, target groups, services and funding targets for each programme and campaign have been described in more detail in a later section.

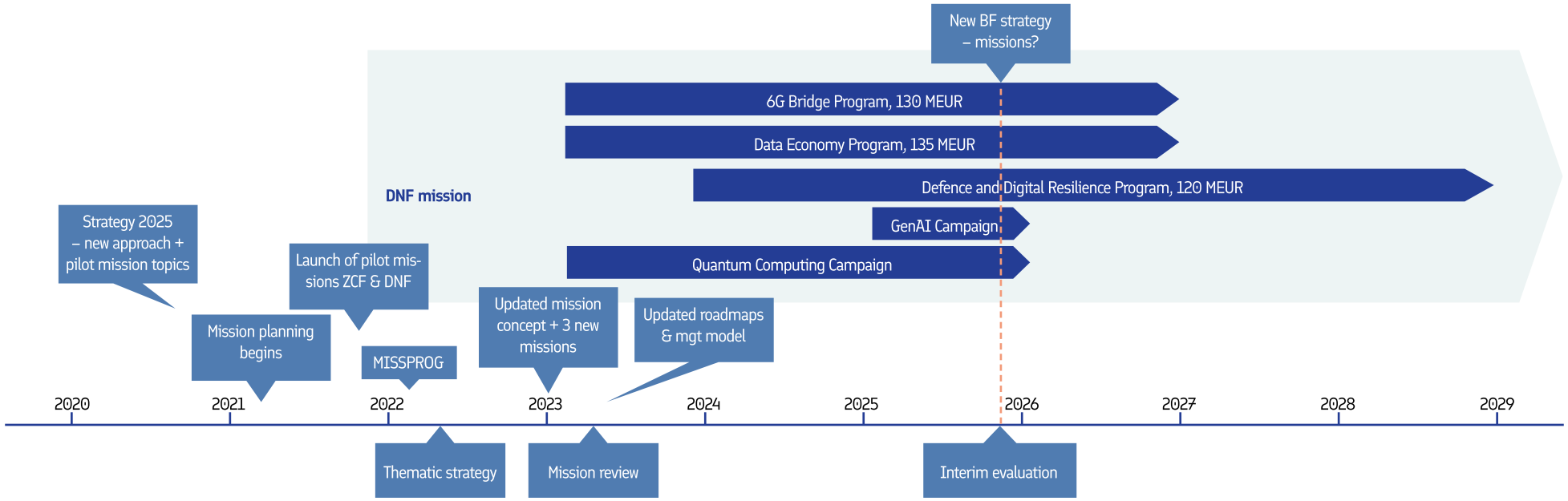


Figure 4. Launch and timeline of the Digital Native Finland mission and related programmes and campaigns.

6G Bridge Programme

Time period	• 2023–2026
Objectives	• Increasing ecosystem cooperation in research and innovation 5GA/6G technology • Building the business ecosystems of the future and attracting international investment • Strengthening 5GA/6G key capabilities • Strengthening testing and experimentation facilities for 6G technology
Key themes / technologies	• 5G Advanced and 6G Technology
Target groups & stakeholders	• Primary target group is ICT industry including large companies and research organisations with relevant research around 5G and 6G technologies • Stakeholders: 6G Finland, 6G Flagship, 5G Momentum, Allied ICT Finland, Academy of Finland, Technology Industries of Finland, Traficom, European Space Agency (ESA), SpaceFinland • Foreign companies that invest in Finland and/or cooperate with Finnish partners
Key services and activities	• Funding for research and innovation projects • Support and expertise for internationalisation • Invest in Finland services for foreign companies • Targeted workshops and information sessions • Support for networking with the right companies, organisations and other actors • Support for cooperation information sharing among participants
Funding target	• EUR 130 million

Data Economy Programme

Time period	• 2023–2027
Objectives	• Supporting the emergence of data-driven and innovative solutions • Networking and cooperation between actors interested in data • Increasing the competitiveness and exports of Finnish companies • Support for research and development • Increase investments in RDI activities
Key themes / technologies	• Data-driven solutions
Target groups & stakeholders	• The programme is intended especially for Finnish SMEs that want to renew their business and utilise the added value of data sharing in international business.
Key services and activities	• Funding for research and innovation projects • Support and expertise for internationalisation • Invest in Finland services for foreign companies • Targeted workshops and information sessions • Support for networking with the right companies, organisations and other actors • Support for cooperation information sharing among participants
Funding target	• EUR 135 million

Defence and Digital Resilience Programme

Time period	• 2024–2028
Objectives	• Support the achievement of the RDI target (EUR 120 million) • Support the achievement of the SDGs • Encourage ecosystems to develop and better cooperate with, for example, the Finnish Defence Forces • Helps companies grow their exports and create new offerings • Helps Finnish actors to integrate into European and international business and research networks, including with NATO countries
Key themes / technologies	• Digital safety and defence solutions, cybersecurity, critical communications, dual-use technologies
Target groups & stakeholders	• Finnish companies (especially SMEs) and research organisations in cybersecurity, digital defence, critical communications • ICT companies with solutions for comprehensive security and resilience, for example through dual-use technologies (e.g. situational awareness solutions)
Key services and activities	• Funding for research and innovation projects • Support and expertise for internationalisation • Invest in Finland services for foreign companies • Targeted workshops and information sessions • Support for networking with the right companies, organisations and other actors • Communication related to international networks and searches in Europe and within the framework of NATO countries (e.g. Horizon Europe, European Defence Fund (EDF) • Support for cooperation information sharing among participants
Funding target	• EUR 120 million

Generative AI Campaign

Time period	• 2025
Objectives	• Awakening companies to the changes and opportunities brought about by artificial intelligence • Supporting businesses in AI transformation • Improving productivity and competitiveness with AI-based solutions • Supporting RDI activities based on generative AI
Key themes / technologies	• Generative artificial intelligence (GenAI)
Target groups & stakeholders	• Finnish companies with focus primarily on technology companies and the ICT industry
Key services and activities	• RDI funding for the creation of new innovations, e.g. GenAI Proof-of-Concept (PoC) • Advice and insights to support the growth of participants • Targeted workshops, briefings and information sessions • Support for networking with the right companies, organisations and other actors • Support for cooperation information sharing among participants
Funding target	• EUR 10 million

Quantum Computing Campaign

Time period	• 2023–2025
Objectives	• Raise awareness: To increase the awareness of Finnish companies and their ability to solve business problems with the help of quantum technology • Increase the uptake of quantum technologies: Helping companies succeed in the use of quantum technologies, such as developing new products and services based on quantum technologies • Support networking: Helping actors focused on quantum technologies to network and collaborate • Support cooperation: To create a high-quality ecosystem focused on quantum technology in Finland • Strengthen competitiveness and exports: Strengthen the international competitiveness of Finnish companies • Attract international actors: Attracting foreign companies, investments and experts to Finland
Key themes / technologies	• Quantum technologies
Target groups & stakeholders	• Finnish companies that solve significant problems with the help of quantum technologies or develop applications and services related to quantum technologies • Foreign companies that want to be involved in the development of quantum technologies in Finland • Research organisations working on various quantum technology applications
Key services and activities	• Expertise and advice on applying for project funding from Business Finland or other funding sources • Computing grant for computing intensive research projects • Grants for Proof of Concepts (PoC) projects, loans for SMEs to productisation after PoC projects • Research funding for Finnish research organisations • Invest in Finland services: support for foreign companies to invest in Finland • Relocation services: support for attracting and bringing talent to Finland • Participation in important international events in the field, influencing EU roadmaps and calls for proposals • Participation in research projects and their management teams • Supporting international cooperation • Facilitated peer learning events
Funding target	• EUR 15 million

Chips Campaign

Chips Campaign is not part of the DNF Mission but instead belongs to the Immersive Digital Life mission. However, given the close connection with the DNF Mission themes, its description has been included into the report.

Time period	• 2024–2025
Objectives	• Growth of new business by activating companies and research institutes for R&D-driven development of expertise, products and business • Open up business opportunities for Finnish companies in the target markets • Help foreign companies to establish themselves in Finland
Key themes / technologies	• Chip industry; microelectronics, photonics and quantum technology
Target groups & stakeholders	• Finnish companies of all sizes operate in the fields of microelectronics, photonics and quantum technology • Research organisations, universities • Other actors in the sector, such as industrial associations and unions • Cities and municipalities interested in the sector and their regional development companies
Key services and activities	• Funding advice • Co-Research funding, Co-Innovation funding, Deep Tech Accelerator funding, Market Explorer funding, Exhibition Explorer funding, Tempo funding, Young Innovative Companies funding • Channelling to EU funding (in particular Chips JU and Eureka Xecs) • Finding the right Foreign Ministry contacts in the destination country • Targeted workshops and information sessions • Supporting cooperation between business groups • Supporting R&D cooperation between enterprises and research institutes
Funding target	• EUR 40 million

2.3. Business Finland's new strategy 2026–2030

The mission concept was introduced as a way to implement Business Finland's strategy for 2020–2025. Towards the end of this evaluation, on 25th November 2025, Business Finland published its new strategy for years 2026–2030.[4] The current narrative highlights that international competition has intensified, geopolitical challenges have increased and the role of industrial policy has been strengthened. Finland has also decided to invest in sustainable growth by significantly increasing research and development funding for companies in the coming years. Against this development, Business Finland is renewing itself to respond to the changed operating environment and to take a central role in implementing growth measures.

In the new strategy, Business Finland has a threefold overall mission to:

1. Leverage private capital in an unprecedented way, ensuring that every public euro generates a multiple investment.
2. Raise the level of ambition in research and development – aiming for world-class breakthroughs, not small improvements.
3. Target resources at the tipping points where Finland has clear advantages and the potential for global success.

The strategy includes four strategic objectives, one of which relates to thematic priorities. Accordingly, Business Finland will focus on building world-class prerequisites for renewing national strengths and creating new growth sectors by:

- Strengthening competences and development environments linked to strategic thematic choices to world-class levels.
- Increasing EU funding and strengthening network contacts.
- Increasing foreign investment and attracting international experts in the selected strategic thematic areas.

The strategy also states four change processes that are required for Business Finland. These are: a) change of the funding principles, b) overall revision of the programmatic operations, c) digital transformation (and utilisation of AI), as well as d) strategic influencing and service collaboration.

The role of missions is not specifically mentioned any more in the new strategy document, but the overall narrative is formulated as a typical mission.

4 Business Finland Strategy. https://mediabank.businessfinland.fi/l/hB-tj5HTpSZ9

3. Mission level findings

3.1. Additionality of the mission to Business Finland

The interviews with stakeholders involved in Business Finland's mission and programme management provided a nuanced and multifaceted view of how the mission concept has been implemented, the value attributed to it, and the challenges encountered. The synthesis found in this chapter weaves together the main findings, highlighting both the strengths and the areas for development in Business Finland's mission-driven approach. The findings on the mission concept itself are not specific to the DNF Mission alone but apply equally to the ZCF Mission.

Relevance of the new approach

Business Finland embarked on a mission-driven approach to innovation policy, seeking to move from fragmented programmatic activities to a more strategic, impact-oriented model. The adoption of missions at Business Finland was influenced by international trends, particularly the growing emphasis on mission-oriented innovation policy within the OECD and EU. These frameworks advocate for tackling grand societal challenges

through focused, long-term initiatives. For Business Finland, missions were envisioned as a way to move beyond traditional funding roles and position the organisation as a leader in driving systemic change.

Internally, the shift was also considered a response to previous programme evaluations, which highlighted the need for clearer, more measurable, and long-term objectives. Missions were intended to provide a thematic compass, guiding Business Finland's strategic choices and ensuring that activities are aligned with broader societal goals. Early scenario planning and foresight exercises in 2019 laid the groundwork for this new direction, emphasising the importance of continuous thematic selection and adaptability.

The role and visibility of the mission in daily work

Across the interviews, there is a recurring theme that the mission's visibility and influence in daily work vary significantly depending on the role and the phase of the programme or campaign. For some, particularly those in leadership or coordination roles, the mission is a regular topic of discussion and a framework for collaboration. Mission Leads are often present in meetings, providing strategic input and facilitating dialogue across programmes and campaigns. However, the mission's operational authority is frequently described as ambiguous. Mission Leads may lack direct power over budgets or decision-making, which can lead to a situation where their role is more about influencing networks than steering concrete actions.

For many programme and campaign participants, the mission is more visible during the initial phases—such as ideation and launch—where the Mission Lead's involvement is crucial for mobilising resources and setting direction. As programmes enter the operational phases, the mission tends to recede, and day-to-day activities are driven more by programme-specific goals and customer needs. This dynamic raises questions about the optimal balance between strategic guidance and operational autonomy.

Additionality to strategic alignment

According to interviews, the mission model has brought several positive changes within Business Finland. It has helped clarify thematic priorities and encouraged a more strategic approach to programme development. The pilot phase, though sometimes unsystematic, has been a valuable learning experience, leading to more structured processes and sharing of best practices in subsequent missions. Importantly, missions have fostered new forms of collaboration, broken down organisational silos and promoted cross-functional teamwork.

Missions aimed to engage a wide range of stakeholders, including companies, research organisations, and public sector actors. The degree of success has varied: some missions built strong partnerships and achieved notable wins, while others remained more internally focused. Efforts to increase the visibility of missions—through events and social media—were made, but the distinction between missions and traditional programmes has not always been clear to external audiences. While missions aspired to drive systemic change, their actual influence has often constrained by limited resources, the scale of ambition, and the complexity of the challenges addressed.

Additionality to implementation

The implementation approach of missions has been closely tied to the personal engagement and leadership style of the Mission Leads. For the Digital Native Finland mission, the creation of cross-organisational core teams was identified as a good practice, fostering collaboration across different programmes and functions.

It has been widely considered that the overall operating model of Business Finland's missions have lacked formal authority and sufficient resources to fully realise their stated ambitions.

Business Finland's organisational structure has evolved into a matrix, with missions providing strategic direction and service areas responsible for operational execution. This interplay, while conceptually sound, has sometimes led to ambiguity and diluted accountability. Mission Leads frequently operate without clear mandates or dedicated resources, relying instead on voluntary collaboration and informal networks.

Missions have developed roadmaps and leveraged foresight tools to guide their activities. The foresight function was enhanced during the mission implementation. The rigor and consistency of these processes have varied across missions. Some missions maintained regular updates and robust horizon scanning, while others struggled to keep processes alive or to translate insights into actionable plans. The connection between missions and operational programmes was often weak, with programmes tending to operate independently and integration efforts creating additional complexity.

Monitoring and evaluation have posed persistent challenges. Overlapping responsibilities and unclear boundaries between missions and programmes have made it difficult to track progress. The absence of clear metrics and integrated data systems has further complicated efforts to assess impact and drive continuous improvement.

Additionality to stakeholders

According to the interviewees, the programme participants, customers, and stakeholders perceive the mission often as an abstract or high-level concept. Customers are primarily interested in clear, accessible services rather than the overarching mission framework. There is a consensus that, while the mission can provide valuable visibility and legitimacy—especially in societal or international contexts—its direct impact on operational activities and customer engagement is limited. The mission's greatest value may lie in its ability to unify messaging and provide a strategic umbrella for initiatives that require broad societal or cross-sectoral collaboration.

The interviews also revealed that the mission's strategic objectives and messages are not always clearly communicated or aligned with the timelines and ambitions of individual programmes. While the mission can serve as a catalyst for new initiatives and foster collaboration, there is a risk of confusion especially if its role is not well differentiated from that of programmes and campaigns. Some interviewees suggest that a more pronounced mission presence could be beneficial in terms of societal impact, but caution that too much visibility might complicate customer interactions.

Additionality to programme and campaign design

Several interviewees credit the mission with enabling the launch of new initiatives and facilitating internal lobbying. However, as programmes progress, decision-making authority often shifts upward in the organisation, and the mission's influence becomes more diffuse.

When it comes to added value, stakeholder opinions are mixed. Some stakeholders see the mission as providing a valuable forum for cross-programme collaboration and knowledge exchange, particularly through regular meetings and joint events such as webinars. In turn, others argue that much of this collaboration would occur even without the mission framework, driven by shared customers and thematic overlaps. The mission's contribution to societal visibility and policy influence is acknowledged, but its concrete impact on customers and programme outcomes is harder to quantify.

Additionality to collaboration and resource allocation

A challenge highlighted in the interviews is the allocation of resources and the organisational positioning of the mission. Resource constraints are a common theme, with many noting that official allocations are often insufficient and that programme leaders cannot always rely on promised support. This leads to a situation where participation in mission-related activities is contingent on availability, and critical tasks may be deprioritised during busy periods.

The organisational structure is also seen as a limiting factor. The transition from thematic teams to mission-based organisation has created some confusion about roles and mandates. While missions are intended to provide strategic direction, the lack of clear authority and dedicated budgets can undermine their effectiveness. Some interviewees advocate for a reorganisation that would give missions greater control over resources

and clearer reporting lines, while others suggest that missions should remain at the strategic level, leaving operational matters to programmes.

A recurring theme in the interviews was the ambiguity surrounding the definition and scope of missions. There was ongoing debate about what constitutes a mission, how it differs from programmes or campaigns, and whether the term "mission" was appropriate in the Finnish context. Missions were intended to be strategic and cross-cutting but often became operational and fragmented due to a lack of focus and prioritisation.

Thematic integration and societal impact

Many missions were criticised for being too broad and ambitious, making it difficult to set clear priorities and demonstrate impact. The slow integration of existing programmes and the development of new ones led to delays and confusion. Without formal authority, dedicated resources, or clear mandates, Mission Leads struggled to coordinate activities and drive change across the organisation.

Setting and tracking concrete, measurable goals proved difficult, especially given the long time horizons and a rapidly changing external environment. The experience of the COVID-19 pandemic and other geopolitical shifts underscored the need for missions to be both long-term and adaptable.

The integration of missions into Business Finland's broader thematic and strategic work is an area of ongoing development. There is recognition that missions can help align programmes with national and international priorities, such as the EU Digital Decade or Finland's digitalisation roadmap. However, the extent to which missions have succeeded in mobilising internal and external stakeholders varies. In some cases, missions have played a key role in shaping national strategies and influencing policy, while in others, their impact has been more limited.

The interviews also highlighted the importance of adaptability and learning. Missions are seen as tools for anticipating future trends and driving long-term change, but their effectiveness depends on their ability to evolve and respond to emerging needs. The lack of systematic monitoring and feedback mechanisms is noted as a weakness, with some suggesting that more robust evaluation processes could enhance learning and impact.

A look forward

The interviews painted a picture of a mission-driven approach that has brought both opportunities and challenges to Business Finland. While missions have succeeded in raising the organisation's profile, fostering collaboration, and aligning with broader strategic goals, their operational impact is constrained by resource limitations and organisational ambiguities. Moving forward, greater clarity, focus, and support will be essential to realising the full potential of the mission model as a driver of innovation and societal impact.

Looking ahead, there is a broad consensus that Business Finland's missions (or thematic focus areas) should be fewer in number, more focused, and better aligned with strategic priorities and available resources. Clearer mandates, formal authority, and dedicated resources are essential for effective implementation. Building on the success of core teams, missions should foster deeper collaboration across programmes, service areas, and external partners.

Stakeholder engagement should also be strengthened, with missions designed and implemented in close collaboration with key actors to ensure relevance and buy-in. The development of clear, measurable indicators for mission progress and impact is critical, as is the integration of monitoring systems across missions and programmes. Finally, missions should be designed to adapt to changing circumstances. This requires regular reviews and updates to roadmaps and priorities, maintaining a long-term perspective while remaining responsive to emerging challenges.

3.2. Additionality to stakeholders, clients and programme participants

The findings summarised in this subchapter reflect stakeholders' perceptions on the DNF Mission's relevance, added value, and contribution to Finland's broader digitalisation and innovation policy landscape. The analysis is based on

qualitative material collected through interviews with stakeholders from key national partners and representative organisations, conducted as part of the evaluation.

3.2.1. Additionality to stakeholders

Across interviewees, the DNF Mission is seen as a relevant and timely strategic framework that provides direction and coherence for Business Finland's work on digitalisation and supports Finland's broader digital transformation agenda. For stakeholders, the mission's core value lies in its ability to connect Business Finland themes, actors, and programmes under a shared narrative: the DNF Mission has provided a valuable platform for long-term stakeholder collaboration, enabling Business Finland and its partners to discuss complex digital transformation themes beyond individual programmes. This has also provided a framework linking Business Finland's actions to broader policy goals, such as the national *Digital Compass* and national EU-level strategic initiatives.

Stakeholders appreciate that the mission concept gives continuity and strategic intent—a visible signal of Business Finland's long-term commitment to digitalisation and data economy topics. This continuity has helped beneficiaries and policy partners to align their own planning with Business Finland's direction. The mission has also helped position Finland as a proactive actor in emerging technologies—such as AI, data spaces, quantum computing, and digital resilience—in international forums and in discussions with partners abroad. Indeed, as highlighted in Table 2, the Mission Lead has been very active in promoting the DNF Mission in various events and stakeholder discussions.

Several stakeholders felt that the mission has helped to provide visibility and legitimacy to topics that previously lacked momentum—such as the data economy or AI adoption among SMEs. The mission is viewed as a useful tool for *agenda-setting and awareness-raising* in collaboration with stakeholder's own activities. In other words, stakeholders can leverage Business Finland mission, programmes and campaigns to support their own activities.

Through events, communication campaigns, and thematic programmes, the mission and its programmes have helped "keeping the issue alive" and strengthened the narrative that digital transformation is central to Finland's competitiveness.

Despite its relevance, stakeholders repeatedly noted ambiguity in mission governance and implementation. Many found it difficult to distinguish between "mission" and "programme" levels or to understand where decisions and funding prior-

Table 2. The DNF Mission promotion activities and presentations held by Mission Lead during 2022–2025.

YEAR	FOCUS	TOPICS	PRESENTATIONS
2022	Mission expansion in Finland	AI Finland, Ministry of Economic Affairs and Employment (TEM), Confederation of Finnish Industries (EK), multiple stakeholder presentations, 6G symposium, MyData, Advisory Boards	47
	International opening	Lukasiewicz (Poland), Latin America preparations	12
2023	Dissemination of results and international contacts	Advisory Board, World Bank, Latin America, Seoul, EMBA, Slush, Oulu & Kainuu Digital Summit roadshow	36
2024	Strategic deepening and global openings	GCC, UAE, Vietnam, Viro, Singapore, USA, SmartWater, DoD, STIP Compass, Marcom, roadmaps & timelines	62
2025	Playbooks, business support, further development	Digital Native Company Playbook, IBM, Fujitsu, TEM, SFS, Jyväskylä roadshow, Osaka DX Day, programme presentations and Digihaku	49
			TOTAL 209 (52 per year)

ities are made within Business Finland. Some stakeholders described the mission as strategically sound but operationally opaque. Some stakeholders questioned the distinct added value of the "mission" label compared with a traditional strategic priority or thematic focus. While the mission aligns with international mission-oriented policy thinking, its operational role remains vague, and many stakeholders found it as overshadowed by more concrete instruments and programmes such as the LCIs. The mission's visibility among client companies is also considered limited, and its integration with the LCIs and other programmes is often unclear.

Contribution to policies and broader operational environment

Stakeholders generally agreed that the DNF Mission has contributed meaningfully to Finnish national-level policy and to Finland's positioning within the EU's digital agenda, typically in indirect ways—through collaboration rather than formal channels of influence.

The most cited concrete example is the *Data Economy Roadmap*, co-developed with Sitra, which helped to shape both Business Finland's own data economy programme and subsequent national policy adoption (e.g., inclusion in the Government Programme and Data Economy Growth Programme by the Ministry of Economic Affairs and Employment). Similarly, stakeholders highlighted that the DNF Mission representatives played a visible role in the *Digital Compass* preparation, adding credibility and concrete content to policy discussions. These examples suggest that the DNF Mission has served as an intermediary between policy formulation and programme execution, helping to link strategic visions with implementable initiatives.

Several stakeholders observed that the DNF Mission has helped to align Finnish activities with EU priorities such as AI, quantum computing, and digital resilience (e.g. preparing statements regarding topical EU initiatives). However, stakeholders also stressed that Finland is still lacking a clear European engagement strategy within Business Finland's digital portfolio, especially in terms of leveraging EU funding mechanisms and communicating national success stories back to EU audiences.

Box 1. DNF Mission's participation in digitalisation policy initiatives

As part of the evaluation, the following digitalisation policy initiatives were identified as examples in which the DNF Mission has participated and played a role. The list is non-exhaustive.

- Artificial Intelligence 4.0 Programme; coordinated by *Ministry of Economic Affairs and Employment*
- Programme for promoting digitalisation; coordinated by *Ministry of Finance*
- Finland's Digital Compass; coordinated by *Ministry of Transport and Communications*
- Data Economy Roadmap; coordinated by *Sitra*
- The Finnish Centre for Open Systems and Solutions Steering Group; coordinated by *COSS r.y.*
- Growth Collective; coordinated by *Kasvuryhmä r.y.*
- Digital Business Advisory Steering Group; coordinated by *TIEKE r.y.*
- European Applied AI Executives Round Table membership; coordinated by *EU AI Alliance, DG CONNECT*
- AI Finland Collaboration (with GenAI campaign); coordinated by *Business Finland*
- EU Global Gateway; coordinated by *DG INTPA*
- EU Data Governance; coordinated by *DG CONNECT & DG JUST*
- 6G Finland network collaboration; coordinated by *6G Finland Association*
- Finland's quantum strategy; coordinated by *Ministry of Economic Affairs and Employment*
- OECD mission-oriented innovation policy collaboration; coordinated by *OECD-STI*
- Green Growth Ecosystem; coordinated by *Confederation of Finnish Industries*
- Manifest for National Software Strategy; *coordinated by DIMECC*
- Establishment of National Software Engineering Ecosystem; *coordinated by SW4E*

In addition, several stakeholders highlighted that especially due to the recent cuts in Business Finland innovation funding, the Business Finland funding instruments remain detached from SMEs' needs. While large firms benefit from the LCI instruments (Veturi), smaller companies struggle to access suitable instruments. Some interviewees considered the LCI instrument, in particular, to be less feasible in the digitalisation field due to the absence of clear lead companies, and preferred an ecosystem-based funding instrument instead. While these issues with funding instruments are not directly linked to the implementation of the DNF Mission, they are considered to undermine the mission's and programmes' ability to achieve their objectives. In addition, some stakeholders identified cuts to Business Finland's operational budget as a potential risk to mission implementation.

Several interviewees called for more diversified funding tools that support incremental experimentation and collaboration beyond traditional R&D projects. Particularly in fast-moving domains such as AI, some stakeholders called for more flexible, experiment-oriented approaches ("rolling up sleeves and getting hands dirty") and practical infrastructures for joint testing and prototyping. The idea of "Business Finland Lab" for more concrete co-creation and experimentation was proposed by one of the interviewees.

3.2.2. Additionality to clients and programme participants

Across interviewees, understanding of the *mission* concept—and its visibility to programme and campaign participants—varies. Most company representatives and research actors are primarily aware of the *programme or campaign* through which they have engaged with Business Finland, rather than the overarching *mission*. Awareness of the "Digital Native Finland" mission is generally low, and many interviewees associated their participation directly with specific programmes such as Defence & Digital Resilience, 6G Bridge, Data Economy, or campaigns like Quantum Computing and Generative AI, without clear understanding of how these are related to a mission structure. Also, the terminology ("mission", "programme", "campaign") is perceived as confusing, and some participants were unaware that their activities formally belonged to a mission (or even programme/campaign).

Still, among those more closely involved (e.g. Advisory Board members or lead companies in large initiatives), the mission was recognised as a *strategic umbrella* that helps bring coherence, coordination, and a longer-term direction across programmes. These stakeholders value the mission model's potential to foster "holistic" thinking, enable cross-vertical learning, and articulate long-term national ambitions beyond individual projects. The mission model is also valued for signalling continuity, helping connect thematic areas, and creating a platform for joint discussions across verticals (e.g. 6G, AI, quantum, defence). The concrete actions within missions (e.g. export delegations) are also highly valued by those more closely involved with the mission.

A few stakeholders explicitly described the mission as *a catalyst*—useful in connecting otherwise fragmented ecosystems and in signalling Finland's strategic intent internationally (e.g. through defence, AI, or quantum technology collaborations). Others highlighted that the mission's added value lies in giving legitimacy to major thematic programmes and in linking company-level innovation with broader societal goals.

At the same time, several concerns about the mission model were voiced among interviewees. Many found the mission as an *internal organising principle* within Business Finland rather than something that tangibly affects beneficiaries' work. The added value beyond existing thematic or strategic programmes has not been obvious to most interviewees. A recurring criticism was that missions are *too broad or abstract*, risk becoming 'everything for everyone', and therefore lack operational clarity. Some stakeholders suggested that missions should be more visible, communicate the overall 'landscape' more clearly, and show how individual programmes contribute to the bigger picture.

Overall, from a beneficiary perspective, the mission's value is seen mainly in strategic-level coordination, visibility, and continuity—but these benefits are not yet fully realised or communicated to operational-level participants.

3.3. Thematic alignment of the project funding

Text mining was used to assess how the project portfolio aligns with—and contributes to—the Digital Native Finland mission. This section presents the approach and results of the analysis. The purpose of the analysis was to obtain a systematic view of how Business Finland funded projects align with missions, the DNF Mission goals, and the DNF Mission's programmes and campaigns, and how this alignment has evolved over time.

Data and methodology

The analysis is based on textual information available on Business Finland projects funded between 2016 and 2025, including public abstracts and, where available, proposals and progress reports. These materials served as input to an AI-based classification pipeline, which assigned each project to three following classifications:

- **Missions**: Circular Transition for Zero Waste, Digital Native Finland, Healthcare Reimagined 2035, Immersive Digital Life, and Zero Carbon Future
- **The DNF Mission goals**: Digital native competencies in Finnish companies, Tech

leadership and global digital competitiveness, Global cooperation in digital business and society

- **Programmes and campaigns under the DNF Mission**: 6G Bridge, Data Economy, Defence and Digital Resilience, Generative AI and Quantum

Each of these classifications was operationalised based on a short definition found in the Business Finland documentation. In the classification pipeline, each project can be relevant to none, one or multiple missions, goals, and programmes or campaigns. The methodology and scripts for implementing the classification pipeline were developed by the evaluation team after which they were shared with the Business Finland data team that applied them within their secure environment and only the resulting classifications were shared with the evaluation team. In this way no project level confidential information was shared outside Business Finland.

Although the scripts were validated prior to being provided to Business Finland and built on earlier work by the evaluation team, manual verification could not be performed because the underlying data were not accessible. Nevertheless, a review of the resulting classifications over time aligns with expectations (e.g. the impact of COVID-19, the introduction of ChatGPT, and Russia's invasion of Ukraine) and reveals no unexplained anomalies.

The classifications produced by the pipeline reflect only the extent to which a project's textual content (e.g. abstracts or deliverables) aligns with mission-related themes. This approach differs from the manual classification applied by Business Finland, which has been used only since the launch of the mission and is based on staff assigning the relevant flags to each project. As a result, incomplete and potentially inconsistent coverage may be produced.

The main added value of the classification pipeline is that a single, consistent logic is applied across the full project portfolio, including projects initiated before the mission began. This enables comparisons over time and across missions, and it allows project links to be identified at multiple levels (mission, mission goal, or specific programme/campaign), including the areas where such links would not typically be expected based on the funding instrument alone.

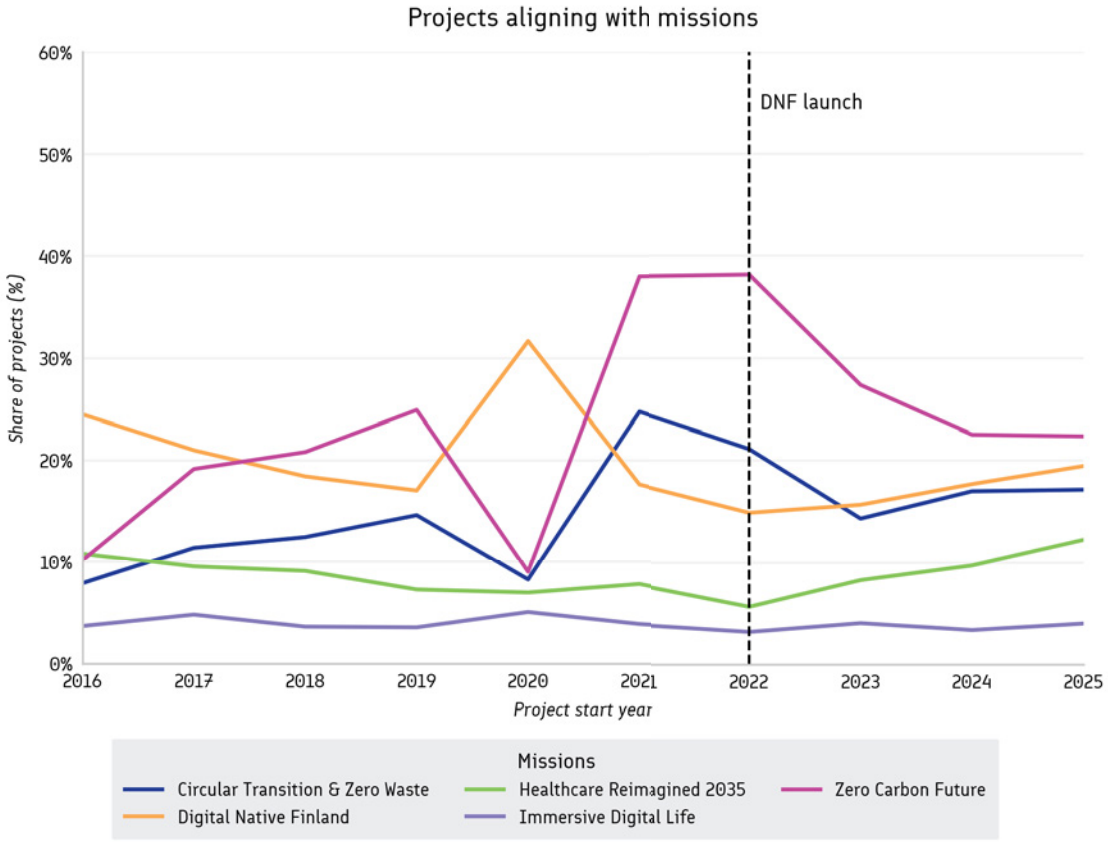


Figure 5. Development of the alignment of Business Finland's project portfolio with the mission (2016–2025).
Source: Business Finland project data from 2016–2025 provided and classified by AI by Business Finland.

Alignment with mission objectives

Figure 5 shows the share of projects classified as relevant to each of Business Finland's five missions over the period 2016–2025. In the overall pattern, 2020 appears to be an outlier across all missions, likely reflecting changes in Business Finland project portfolio related to the COVID-19 pandemic. In the overall pattern, a substantial share of projects is accounted for by Digital Native Finland throughout the period. The share of Digital Native Finland fluctuates between approximately 10 and 30 percent and thereby one of the missions with the largest share of projects contributing to it. After the launch of the DNF Mission in 2022, its share rises a bit but without any clear discontinuity, suggesting that the mission formalised a pre-existing emphasis rather than introducing a completely new focus of the project portfolio.

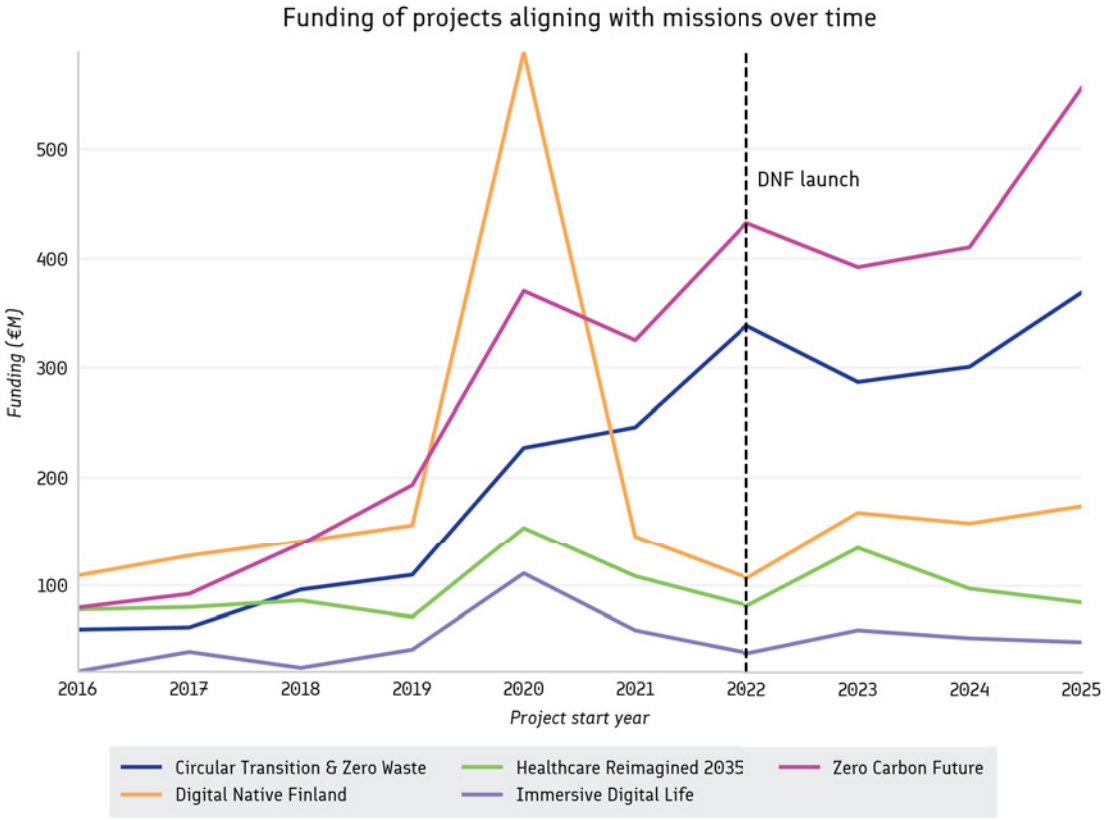


Figure 6. Development of the alignment of Business Finland's funding with the mission (2016–2025).
Source: Business Finland project data from 2016-2025 provided and classified by AI by Business Finland.

Figure 6 shows funding alignment with missions of Business Finland. One sees a different pattern than for the share of projects, with a clear increase in allocated funding aligning with the Digital Native Finland Mission for the year 2020, and overall, an increase in alignment with the missions of Zero Carbon Future and Circular Transition & Zero Waste starting in 2017, possibly related to the Paris agreement that was signed in 2016, that focused climate action, long-term decarbonisation, and the transition to a sustainable, low-emission economy. This increase is not present for the missions Digital Native Finland, Healthcare Reimagined 2035 and Immersive Digital Life. From 2021 onwards, the largest share of funding aligns with Zero Carbon Future, followed by Circular Transition and Zero Waste.

Figure 7. Thematic overlap of Business Finland's missions, indicated by the share of projects classified under each two missions (row vs. column).
Source: Business Finland project data from 2016-2025 provided and classified by AI by Business Finland.

Overlap between different missions

To understand how often projects align with more than one mission, the Figure 7 presents the mission-level overlap heatmap. Each cell shows the share (percentage) of projects classified under the mission in the row that are also classified under the mission in the column. For example, the figure indicates a strong overlap between Zero Carbon Future and Circular Transition and Zero Waste, with 74 percent of projects that are classified under the mission Circular Transition and Zero Waste also being classified under the mission Zero Carbon Future. This is to a lesser extent the case for projects that are classified under the mission Zero Carbon Future, of which only 49 percent is also classified under the mission Circular Transition and Zero Waste. Similarly, Immersive Digital Life and Healthcare Reimagined 2035 show an increased overlap with Digital Native Finland, indicating that many digitalisation-oriented projects are also relevant for these missions.

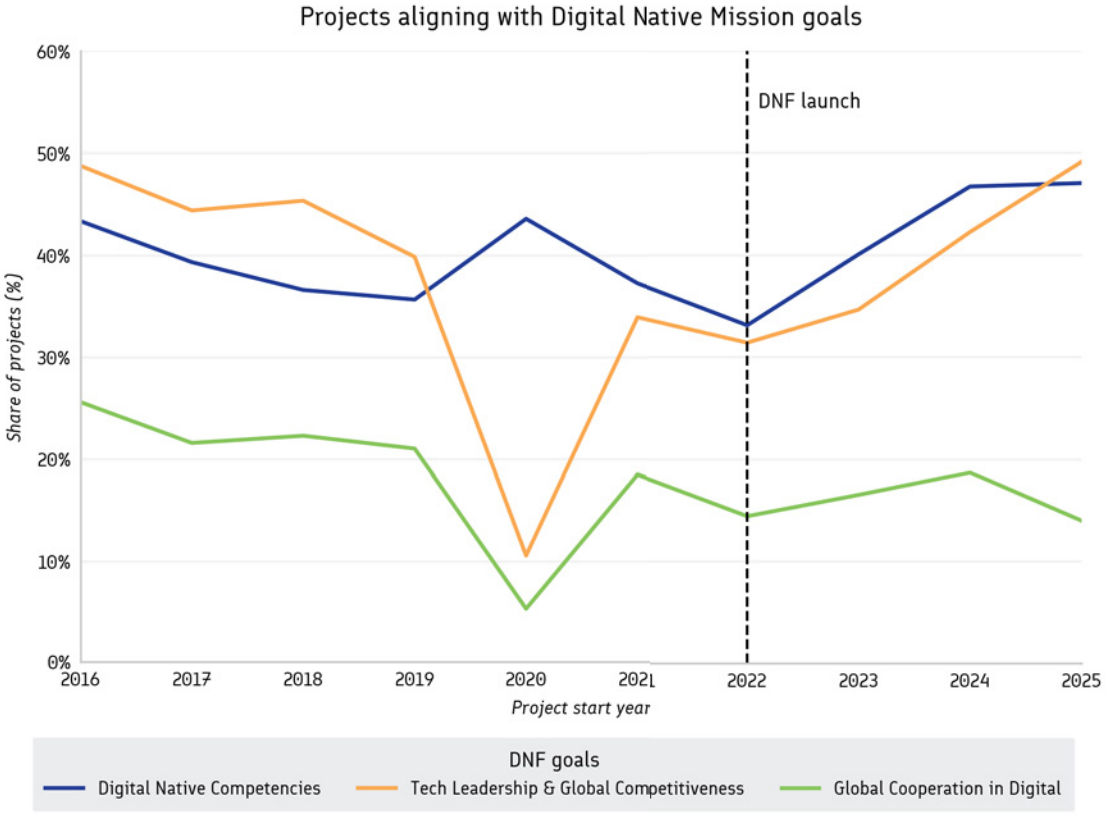


Figure 8. Thematic alignment of Business Finland's project portfolio with the Digital Native Mission goals.
Source: Business Finland project data from 2016–2025 provided and classified by AI by Business Finland.

Alignment with the Digital Native Finland mission goals

The following figure (Figure 8) presents the alignment of the project portfolio with the three goals of the DNF Mission. The projects supporting the goal of *digital native competencies* form the largest and most stable group, representing 35 to 45 percent of all funded projects. The projects supporting the goal of *tech leadership* and *global digital competitiveness,* in turn, show stronger variation over time. Their share drops sharply around 2020, which might be due to the changes in the Business Finland portfolio that took place during the COVID-19 pandemic. After the DNF Mission was launched, the trend reverses: alignment rises steadily from around 30 percent in 2022 to nearly 50 percent by the end of the period. These shares are also considerably higher than in the projects that are aligned with the mission, which may indicate that concepts like *tech leadership* and *global competitiveness* are wider concepts that extend beyond projects related to the Digital Native Finland mission.

Global cooperation in digital remained a smaller component of the portfolio throughout the period, accounting for between 13 and 25 percent of projects. This may indicate that the focus has rather been on developing local digital capacity than developing international collaboration.

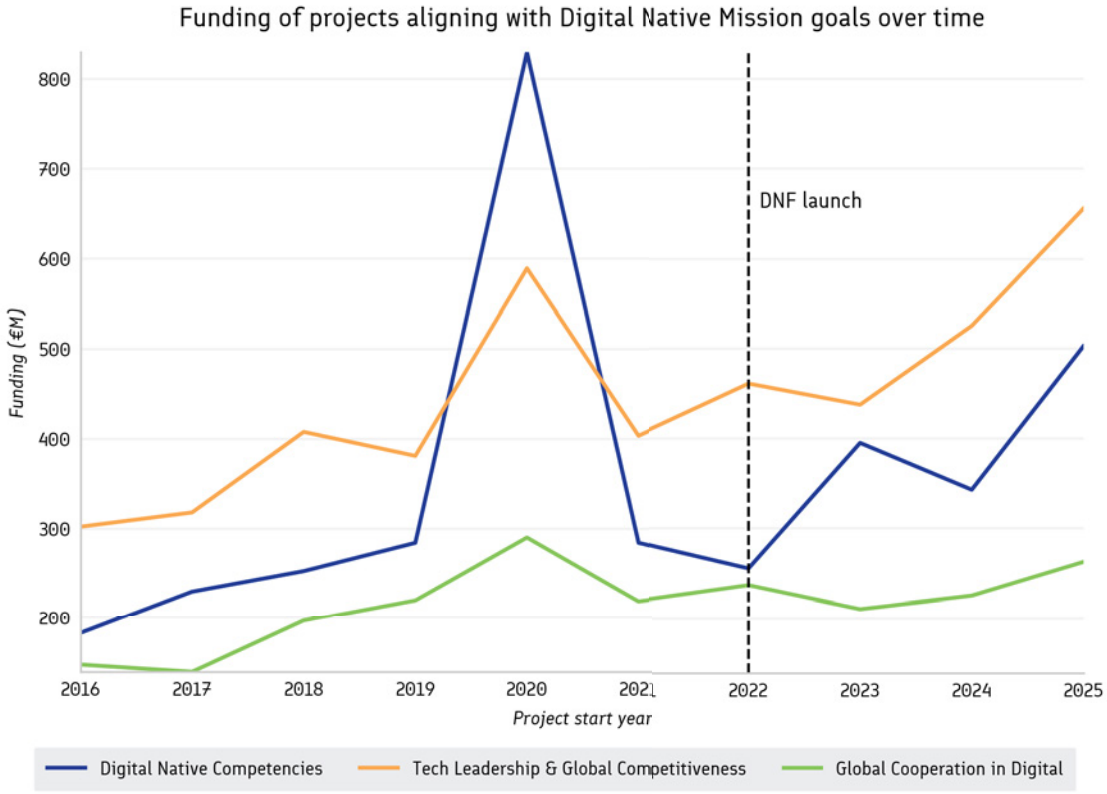


Figure 9. Thematic alignment of Business Finland's funding with the Digital Native Mission goals.
Source: Business Finland project data from 2016–2025 provided and classified by AI by Business Finland.

Figure 9 shows funding alignment with missions of Business Finland. One sees a different pattern than for the share of projects, again with a clear increase in 2020 for the Digital Native Competencies, which closely relates to the Digital Native Finland mission. Despite this peak, the most funding is aligned with Digital Native Finland goal of Tech Leadership and Global Competitiveness, the overall portfolio of Business Finland aligns to a lesser extend with the goal of Digital Native Competencies and the least amount of funding is allocated to projects that align with the Global Cooperation in Digital goal.

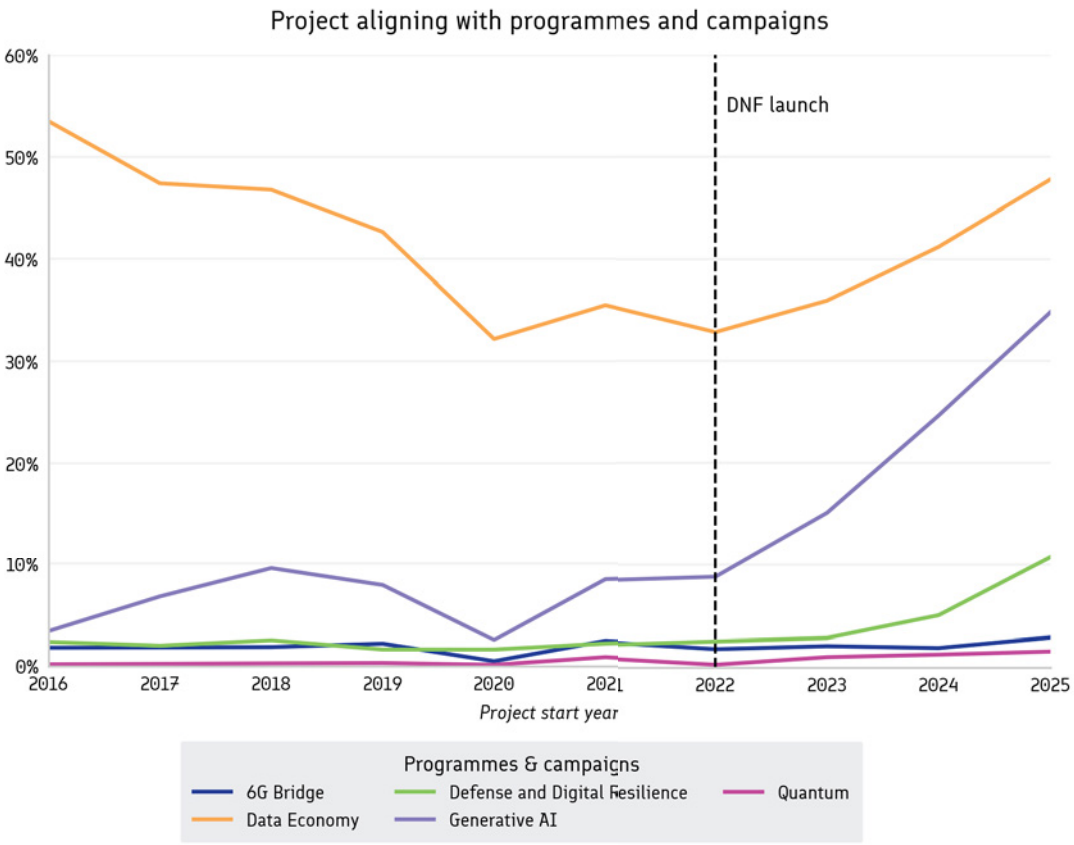


Figure 10. Thematic alignment of Business Finland's project portfolio with the DNF Mission programmes and campaigns.
Source: Business Finland project data from 2016–2025 provided and classified by AI by Business Finland.

Alignment with programmes and campaigns

The Figure 10 shows the thematic alignment of Business Finland's project portfolio with the DNF Mission programmes and campaigns. Data Economy is the most frequently classified programme. Its share declines from more than half of projects in 2016 to around one third in 2020, then stabilises and begins to rise again after 2022, reaching nearly half of all projects by 2025. The strong emphasis on Data Economy may also reflect that the concept is defined broadly and can be applied across a wide range of activities, potentially leading to an overly inclusive classification.

The development of Generative AI shows a quite different trajectory. While it accounted for only a small share in the early years, it increased rapidly after 2022, reaching more than 30% of projects by 2025. This trend aligns with the release of ChatGPT in November 2022, and suggest that it took little time before more attention came for generative AI in the projects funded by Business Finland.

The share of the projects covering thematics of relevance to Defence and Digital Resilience increased markedly, from close to zero in 2022 to around 10% of funded projects by 2025. The timing of this strengthened focus on cyber resilience and dual-use technologies reflects broader trends and heightened urgency in Finland and Europe following Russia's invasion of Ukraine in 2022. In contrast, 6G Bridge and Quantum have remained consistently niche categories.

Figure 11. Thematic overlap of the DNF Mission's programmes and campaigns, indicated by the share of projects classified under each two program campaigns (row vs. column). Source: Business Finland project data from 2016-2025 provided and classified by AI by Business Finland.

Overlap between programmes and campaigns

Figure 11 shows the extent to which projects align with multiple DNF Mission programmes or campaigns. The heatmap shows substantial overlap between all programmes and campaigns and Data Economy. There is a particularly strong overlap between the projects that are classified under Generative AI and Data Economy, indicating strong conceptual and technological linkages between data-driven innovation and emerging AI capabilities. Data Economy also overlaps considerably with Defence and Digital Resilience, driven by the role of data infrastructure, interoperability and secure digital operations within resilience initiatives.

Summary of thematic findings

The findings of the thematic analysis indicate that the Digital Native Finland mission formalised an existing focus of the Business Finland activities rather than redirecting the project portfolio. This is evidenced, first, by the fact that mission-related themes were already substantially covered in the portfolio prior to the mission's introduction in 2022 and, second, by the absence of a structural break in the share of digital projects following the mission's launch.

The timing of trends in the alignment of Business Finland's portfolio with specific programmes and campaigns suggests that external shocks and developments have played a stronger role than the mission itself in redirecting the portfolio. Devel-

opments such as the emergence of generative AI, the renewed urgency of defence-related projects following Russia's invasion of Ukraine, and the COVID-19 pandemic appear to have driven shifts in project focus.

Digitalisation themes also cut across multiple missions. Substantial overlap is observed in the project portfolio between projects classified as relevant to the Digital Native Finland mission and those linked to other missions with strong digital components, such as Immersive Digital Life and Healthcare Reimagined.

3.4. Alignment with mission typologies

As part of the evaluation, a literature review focusing on recent research on mission-oriented policy was conducted to explore current trends and typologies of missions and mission-oriented programmes. The findings of the review are presented in more detail in Appendix 2. Based on these typologies and definitions, the following section assesses the alignment of the DNF Mission in relation to other types of mission models.

In general, the mission approach can be viewed through several established typologies, each highlighting a different facet of strategic intent and implementation. In terms of the distinction between **transformer and accelerator missions,**[5] the DNF Mission aligns primarily with a transformative logic: its focus is on advancing entirely new technological domains rather than scaling existing solutions. When examined through the lens of **market-shaping versus market co-creating** missions,[6] the DNF Mission is closer to the latter. Its emphasis lies in fostering the emergence of novel solutions and ecosystems, rather than shaping markets through regulatory interventions or public procurement.

From the perspective of **catalytic versus enabling missions,**[7] the DNF Mission exhibits characteristics of both. It plays a catalytic role by mobilising new R&D projects and encouraging companies to begin or expand innovation activities. At the same time, it is functioning as an enabling mission by supporting the development of new technologies and capabilities that underpin broader innovation trajectories. Finally, considering **temporal and ambition-based** mission types, the DNF Mission can be described as transitional and ambition-driven. It is structured around a roadmap that guides progress toward long-term goals, yet it does not operate with a fixed end date. Instead, its direction is defined by an overarching ambition to advance strategic technologies and capabilities over time.

When comparing different types of missions, a useful point of reference is the OECD's mission-oriented innovation policy (MOIP) typology,[8] which categorises missions according to their scope, governance model and intended system effects. Within this framework, Business Finland's missions are characterised as *challenge-based programmes and schemes*, reflecting their focus on targeted technological or industrial challenges with clear objectives and defined stakeholder groups. At the same time, elements of the wider Finnish mission landscape map into other OECD categories. The LCI initiatives correspond closely to *ecosystem-based mission programmes*, as they aim to mobilise leading firms and their networks around shared strategic goals. National programmes such as the Digital Compass and the Data Economy Roadmap, in turn, fit the profile of *overarching mission-oriented programmes*, given their whole-of-government scope and systemic orientation. In parallel, the Research Council of Finland's Flagship Programme represents a distinct type of *thematic mission-oriented programme*, anchored in long-term excellence and capacity-building within specific scientific domains. This suggests that the DNF Mission and the BF mission model should be assessed and positioned in the broader policy context.

5 See e.g. Fraunhofer ISI (2020) Developing a Typology for Mission-Oriented Innovation Policies. Fraunhofer ISI Discussion Papers Innovation Systems and Policy Analysis No. 64.
6 See e.g. Mazzucato, M. (2018a) Mission-oriented innovation policies: challenges and opportunities, Industrial and Corporate Change, Volume 27, Issue 5, Pages 803–815.
7 See e.g. Janssen, M. et al (2023) Missions as boundary objects for transformative change: understanding coordination across policy, research, and stakeholder communities, Science and Public Policy, Volume 50, Issue 3, June 2023, Pages 398–415.
8 OECD. Mission-oriented Innovation Policy (MOIP) database. https://stip.oecd.org/moip/

Table 3. Positioning of the DNF Mission and other Finnish initiatives against the OECD typology of missions. * = Finnish initiatives not in the OECD database.

OECD TYPOLOGY	DESCRIPTION	EXAMPLES IN OECD DATABASE
Challenge-based programmes and schemes	Targeted agency schemes, aiming to accelerate the development of concrete solutions to a specific challenge. The 'moonshot' challenge-oriented programmes are broadly inspired by DARPA. They focused on specific and ambitious problems (to be solved) and are implemented in dedicated agencies or programmes with strong leadership.	**The DNF Mission (and other Business Finland missions)** Pilot-E, CLIMIT (NO) KIRAS (AU) Industrial Strategy Challenge Fund (UK) Impact Canada (Canada)
Ecosystem-based mission programmes	Mechanisms delegating to ecosystems of actors the development and implementation of strategic agendas to address societal challenges. Some governments have delegated the missions, or aspects of the missions, to relevant stakeholders. The degree of this delegation can range from having these ecosystem players setting the strategic direction, to attracting project applicants, or to making funding decision.	Strategic Innovation Programme, Impact Innovation (Sweden/Vinnova) Innomissions (Denmark) *the LCI ecosystems
Overarching mission-oriented strategic frameworks	Overarching strategic and policy frameworks directly structured around missions. Broad initiatives set up at the highest level of policy making to coordinate actions among a wide array of public and private actors toward missions with concrete and ambitious targets.	Mission Driven Top-Sector and Innovation Policy (NL) Horizon Europe missions (EU) The Moonshot R&D Programmes (Japan) *Digital Compass
Thematic mission-oriented programmes	Traditional thematic research programme reformed to make them progressively more directional. These thematic missions co-ordinate wide interdisciplinary and cross sectoral teams to meet ambitious objectives related to a mix of societal and competitive challenges. They often involve a broader set of interventions than traditional R&D supports, and support technologies across the innovation chain.	CSIRO Mission Programme (Australia) * Research Council Flagship
Place-based missions	Initiatives that rely on local collective action and bottom-up partnerships to solve challenges.	
University-led missions	Initiatives that rely on local collective action and bottom-up partnerships to solve challenges. Universities instigate missions and use them as a framework to shape their research and/or internal processes.	

In addition, the OECD criteria allow for a more fine-grained assessment of how Business Finland's DNF Mission and the LCI ecosystems align with different mission-oriented approaches. When viewed through the lens of *challenge-based programmes and schemes*, both the DNF Mission and the LCI score strongly. They are clearly geared toward ambitious, challenge-driven objectives and draw on cross-disciplinary partnerships across the innovation system. Their portfolios also involve multiple actors from academia and industry, although neither follows a stage-gate logic typical of some mission programmes that progressively narrow the project pipeline.

In relation to *thematic mission-oriented programmes*, both initiatives show partial alignment. They incorporate established challenges that guide research activity and involve mission managers who steer resources toward R&D efforts. The strongest alignment lies in the presence of substantial R&D project portfolios addressing mission topics. However, these missions differ from more research-driven thematic programmes in that government researchers play only a limited role, and collaboration with public research institutions is less central than in OECD exemplars.

The *overarching mission-oriented strategic framework* category captures structural and governance features. Here, the DNF Mission and the LCI again demonstrate some alignment: both are structured around missions and supported by roadmap processes that outline the trajectory for achieving long-term goals. Governance arrangements – such as advisory bodies or mission management structures – are also in place, although in more narrow manner than in typical government-wide programmes. In addition, neither the DNF Mission nor the LCI employs a broad policy mix typical of large national mission frameworks (such as the Digital Compass in Finland) that integrate regulation, procurement, skills, tax incentives and public investment.

Finally, the *ecosystem-based mission programme* perspective highlights more decentralised, community-driven dynamics. The DNF Mission demonstrates partial alignment through its Advisory Board mechanism, which helps coordinate shared objectives and agendas among key actors. Yet, the LCI exhibits much stronger alignment: ecosystems organised around leading companies commonly agree on strategic priorities, build project pipelines and, in some cases, are closely involved in shaping funding decisions or advising on them.

Overall, the assessment indicates that the DNF Mission and the LCI exhibit a hybrid profile across OECD mission types, aligning most strongly with challenge-based and overarching mission frameworks, while the LCI more closely embodies ecosystem-based characteristics.

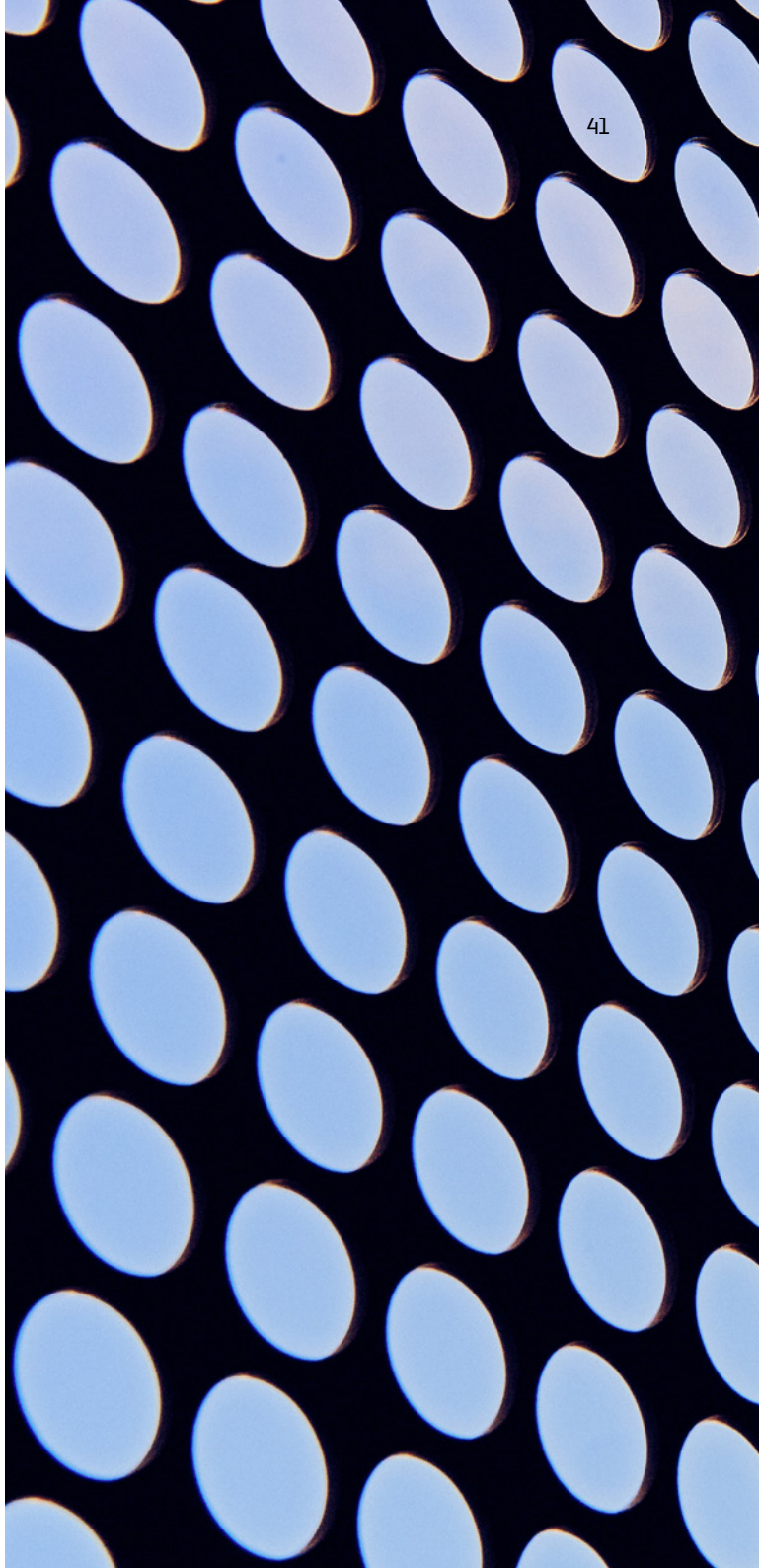


Table 4. Comparison of the DNF Mission (and other Business Finland missions) and the LCI ecosystems with the OECD typology and criteria.

TYPOLOGY (OECD)	CRITERIA (OECD)	DNF MISSION	LCI (VETURI)
Challenge-based programmes and schemes	Programmes and projects are challenge-driven and geared towards ambitious and concrete performance targets	+++	+++
	The agencies or moonshot programmes cut across various disciplines, sectors and stages of the innovation chain	++	+
	A portfolio of research projects delivered by partners across the innovation system (i.e., academia, industry, and government)	++	++
	Challenges often operate through a stage-gate model, where they provide larger sums of funding over subsequent funding rounds but to a smaller number of projects	-	-
Thematic mission-oriented programmes	Established challenges guide research	+	+
	Mission managers provide leadership and direct resources towards research projects	+	+
	A portfolio of research projects to address the mission	+++ (R&D)	+++ (R&D)
	Government researchers often play a larger role, and collaborate with academia, industry and other partners as needed	-	-
Overarching mission-oriented strategic frameworks	Structured around missions	+++	+++
	Accompanied by an implementation roadmap on how to achieve the missions	+++	+++
	Established governance arrangements for each mission (mission expert groups or boards, mission managers, etc.)	+	+
Ecosystem-based mission programmes	Broad policy mix deployed to achieve the missions	-	-
	Implicated communities commonly agree on objectives and strategic agendas / roadmaps in specific challenge areas	+ (Advisory Board)	+++
	Some ecosystem bodies build a pipeline of projects that can address the missions, and encourage other actors to apply for funding	-	+++
	Some ecosystems are involved in funding decisions, either directly making the decisions on what projects to fund, or providing recommendations to a government body	-	++

4. Programme level findings

4.1. Overall funding for digitalisation projects

During the period of 2022–2025 the overall Business Finland funding volume for digitalisation related projects was approximately EUR 924 million. Out of this, the majority (58%) of the digitalisation related project funding was so called bottom-up funding (EUR 537 million), i.e., these projects were not related to any thematic programme or campaign.

Altogether EUR 222 million (24%)[9] of the digitalisation project funding was channelled through the Digital Native Finland mission and its dedicated programmes and campaigns, and yet a smaller share (EUR 164 million, 18%) of digitalisation related projects were funded through other programmes than those of the DNF Mission.

9 Note that not all programme funding is accounted in this number, as not all programme funding under Digital Native Finland is classified in CRM under digitalisation themed funding. The total programme and campaign funding under the mission is EUR 257 million.

Productivity via digitalisation

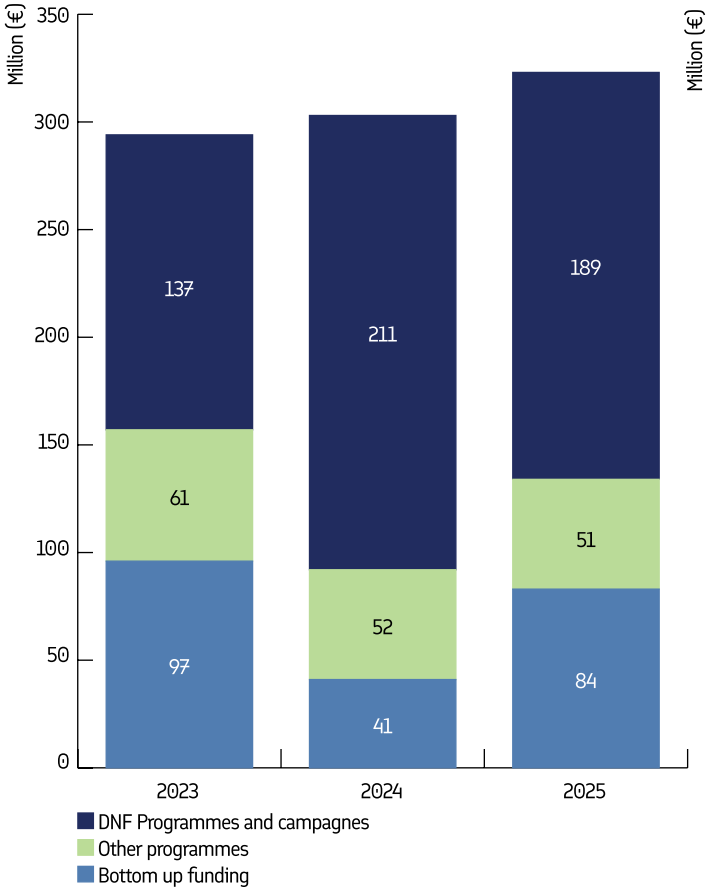


Figure 12. Business Finland thematic funding for digitalisation.
Source: Business Finland.

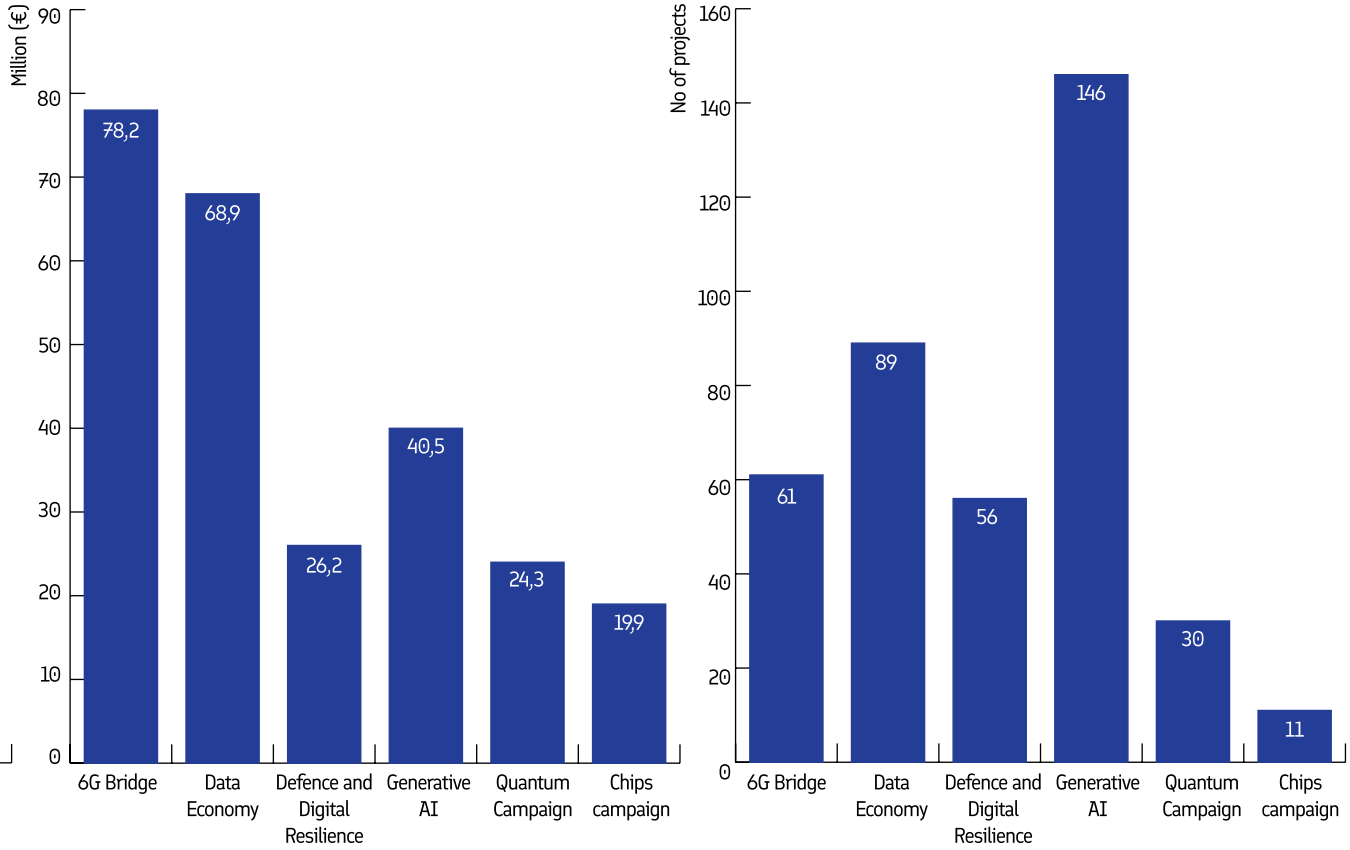


Figure 13. Total volume of Business Finland's funding per the programme and campaign (Left: EUR million. Right: Number of funded projects).
Source: Analysis based on Business Finland project data.

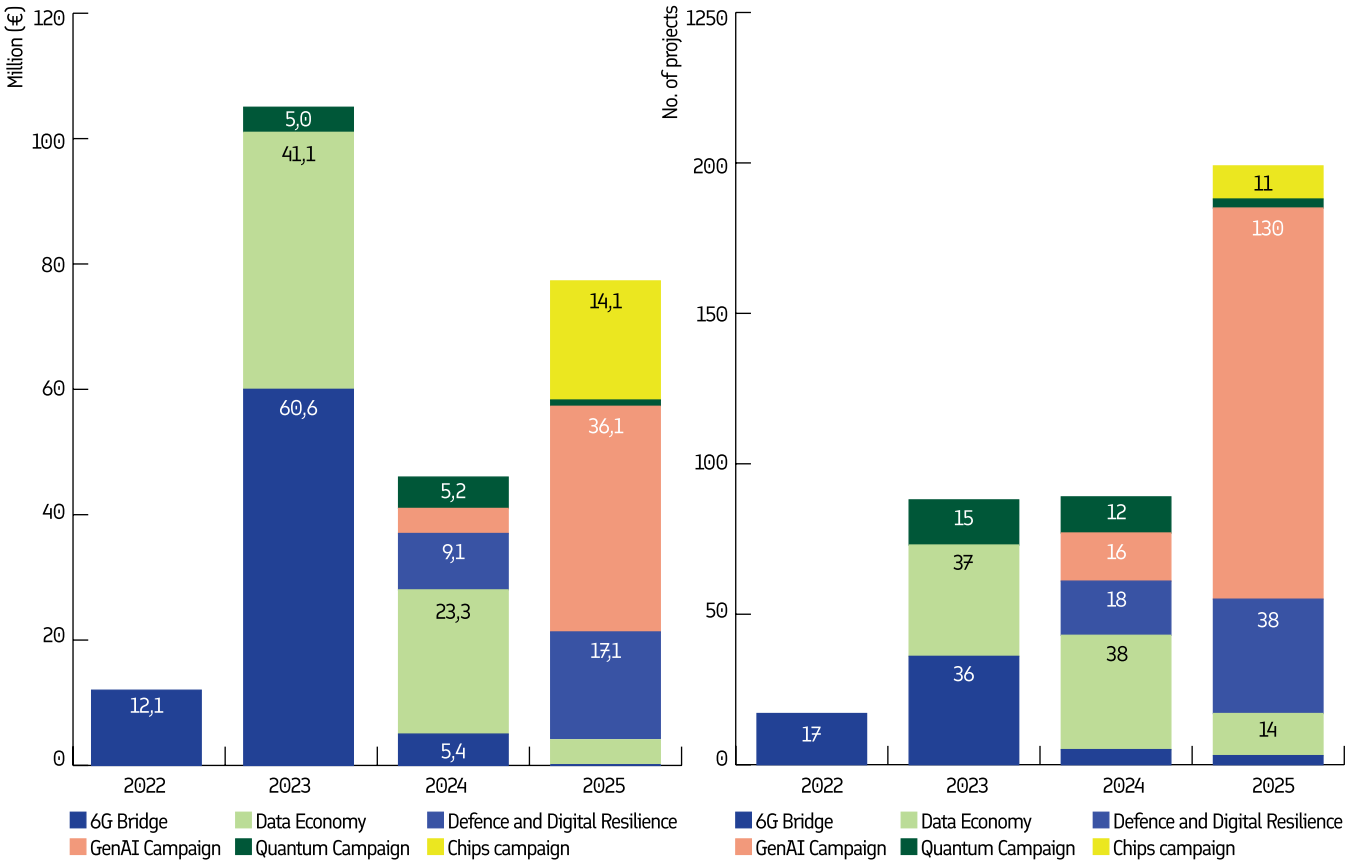


Figure 14. Total volume of Business Finland's annual funding per the programme and campaign (Left: EUR million. Right: Number of funded projects).
Source: Analysis based on Business Finland project data.

4.2. Programme and campaign funding of the DNF Mission

The Digital Native Finland mission has granted a total of EUR 257 million, with the 6G Bridge and Data Economy Programmes accounting for over half of the total funding. Annual funding peaked in 2024. The largest share was granted to the 6G Bridge Programme with EUR 78.2 million, followed by the Data Economy Programme with EUR 68.9 million. The Defence and Digital Resilience Programme received EUR 26.2 million, the GenAI Campaign EUR 40.5 million, the Quantum Campaign EUR 24.3 million, and the Chips Campaign EUR 19.9 million. Funding increased sharply from EUR 12.1 million in 2022 to EUR 80.6 million in 2023, as more programmes were initiated. In 2024, total funding reached EUR 91.1 million, and in 2025, funding totalled EUR 73.2 million.

Research versus company funding

Across the Digital Native Finland mission's programmes and campaigns, companies have received the majority of funding in nearly all programmes. Most notably in the GenAI Campaign (98%) and Data Economy (78%), while research organisations have played a larger role in Defence and Digital Resilience (54%) and 6G Bridge (34%).

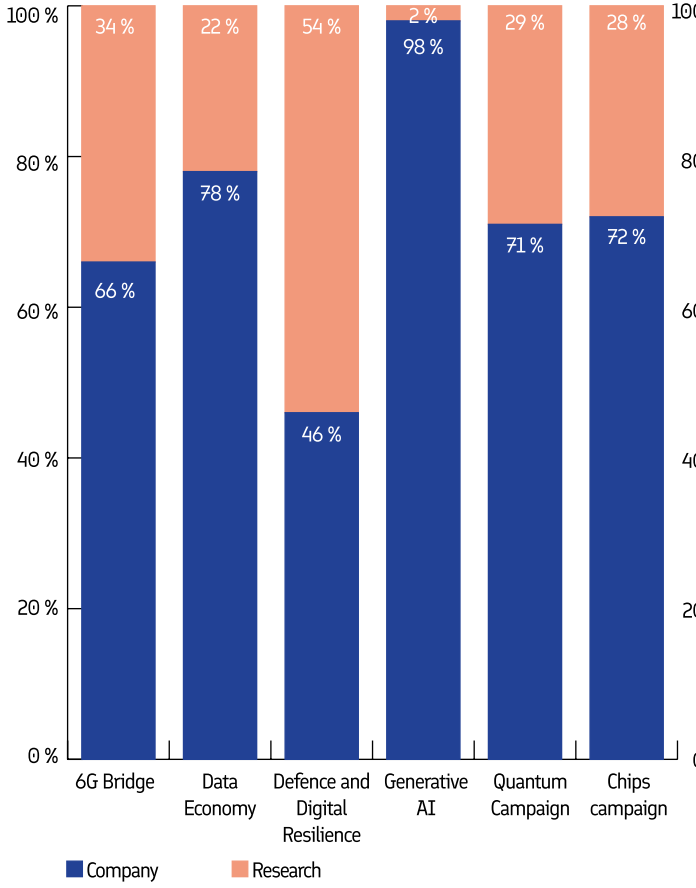


Figure 15. Share of Business Finland funding to companies and research organisations during 2022-2025. Source: Analysis based on Business Finland project data.

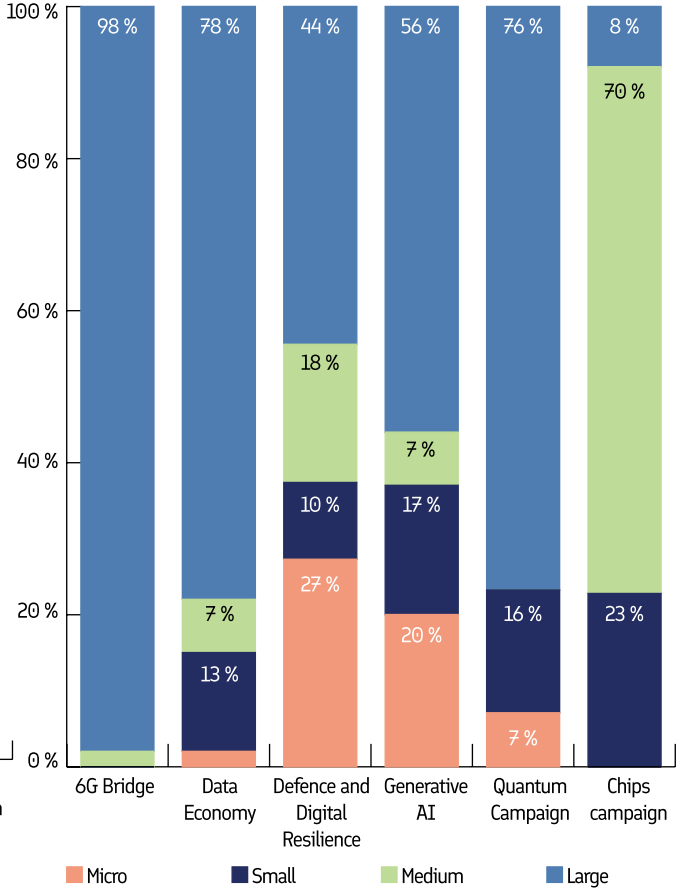


Figure 16. Share of Business Finland funding to companies based on their size during 2022-2025. Source: Analysis based on Business Finland project data.

Company size

The distribution of company funding shows that large companies dominate the Digital Native Finland clientele, particularly in technology- and infrastructure-oriented programmes, while smaller firms play a more prominent role in emerging or experimental initiatives. In the 6G Bridge Programme, funding was overwhelmingly directed to large companies (98%, excluding research organisations), with only marginal participation from small and medium-sized firms. The Data Economy Programme similarly shows a strong concentration of funding among large companies (78%), with small and medium-sized firms receiving 22 percent of the funding. In the Quantum Campaign, 76 percent of funding was allocated to large or large midcap companies, while 16 percent went to small and seven percent to medium enterprises.

In contrast, the Defence and Digital Resilience Programme displays a more balanced funding profile, with 44 percent of grants awarded to large companies, 45 percent to small and medium-sized firms and 10 percent to micro enterprises. In the GenAI Campaign 56 percent of funding went to large companies and 44 percent to micro, small and medium-sized firms.

The Chips Campaign, however, was dominated by medium-sized enterprises (70%) and small companies (23%).

Industry sectors

The industry distribution of funding within the Digital Native Finland shows that manufacturing and information and communication sectors dominate most programmes and campaigns, while the professional, scientific, and technical activities sector plays a complementary but growing role in certain areas, especially in chips campaign.

In the 6G Bridge Programme, the funding was almost entirely directed to the manufacturing

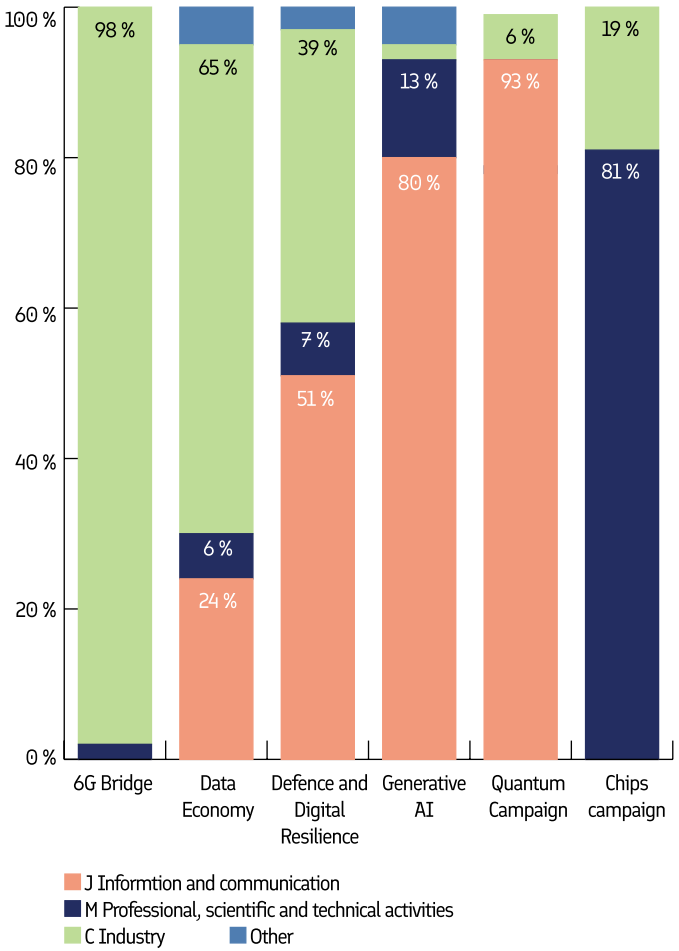


Figure 17. Share of Business Finland funding to companies based on their size during 2022-2025. Source: Analysis based on Business Finland project data.

(98%), The Data Economy Programme also shows a strong manufacturing presence, with 65 percent of funding, while 24 percent went to the information and communication sector and six percent to professional and scientific activities. The Defence and Digital Resilience Programme presents a more balanced industrial structure: 39 percent of funding went to manufacturing companies, 51 percent to information and communication firms and seven percent professional, scientific, and technical activities. In the GenAI and Quantum Campaign were dominated by ICT sector. In GenAI, 80 percent went to information and communication sector, while 13 percent went to professional, scientific, and technical activities and in Quantum Campaign 93 percent went to information and communication sector and six percent to manufacturing. The Chips Campaign stands out as mainly dominated by professional, scientific, and technical activities (81%) and manufacturing (19%).

The numbers do not include research organisations.

Joint projects

Collaborative R&D varies across programmes and campaigns. In total, 147 joint project funding decisions were made, representing 37 percent of all projects and 28 percent of total granted funding (approximately EUR 71.7 million).

The Data Economy Programme stands out with the highest number of joint projects (59), corresponding to 66 percent of its total projects and 37 percent of its total funding (EUR 27.1 million). The Defence and Digital Resilience Programme also shows a strong collaborative profile, with 36 joint projects making up 64 percent of its total and representing 78 percent of its total funding (EUR 20.4 million). The Chips Campaign had eight joint project funding decisions (73%) totalling 37 percent of its total funding (EUR 7.4 million).

In contrast, the GenAI Campaign exhibits limited collaboration: only nine joint project funding decisions (6%) and six percent of total funding (EUR 2.3 million). The 6G Bridge Programme includes 25 joint projects (41%) accounting for 14 percent of total funding (EUR 11.0 million). The Quantum Campaign represents moderate level of collaboration. Quantum has ten joint projects (33%), representing 14 percent of total funding (EUR 3.4 million).

Table 5. Share of joint projects across the programmes and campaigns. Source: Analysis based on Business Finland project data.

	6G BRIDGE	DATA ECONOMY	DEFENCE AND DIGITAL RESILIENCE	GENAI CAMPAIGN	QUANTUM CAMPAIGN	CHIPS CAMPAIGN	TOTAL
Number of joint project funding decisions	25	59	36	9	10	8	147
Volume of joint project funding decisions (M€)	11.0	27.1	20.4	2.3	3.4	7.4	71.7
Share of joint projects (no. of projects)	41%	66%	64%	6%	33%	73%	37%
Share of joint projects (euros)	14%	37%	78%	6%	14%	37%	28%

Types of funding services and instruments

The most common funding services across the programmes and campaigns were research development and piloting, Co-Innovation (research and company participants), and Co-Research reflecting each programme's strategic objectives and maturity level in the innovation pipeline.

In the 6G Bridge Programme, the funding is dominated by Research, Development and Piloting (66%), Co-Research (19%) and Co-Creation (14%), reflecting high concentration of early-stage ideation and concept development. The Data Economy Programme is centred on Research, Development and Piloting (55%) and Co-Innovation (companies 39% and research organisations 39%). In Defence and Digital Resilience Programme, the funding structure consists of Co-Innovation (companies 22% and research organisations 17%) and Co-Research (15%). The GenAI Campaign is the most concentrated in Research, Development and Piloting (94%). In the Quantum Campaign, funding is mainly distributed between Research, Development and Piloting (70%), Co-Research (13%) and Co-Innovation (research organisations 17%). Finally, the Chips Campaign displays a similar pattern, Research, Development and Piloting (63%) as the main funding channel, followed by Co-Innovation (Research organisations 28% and companies 10%).

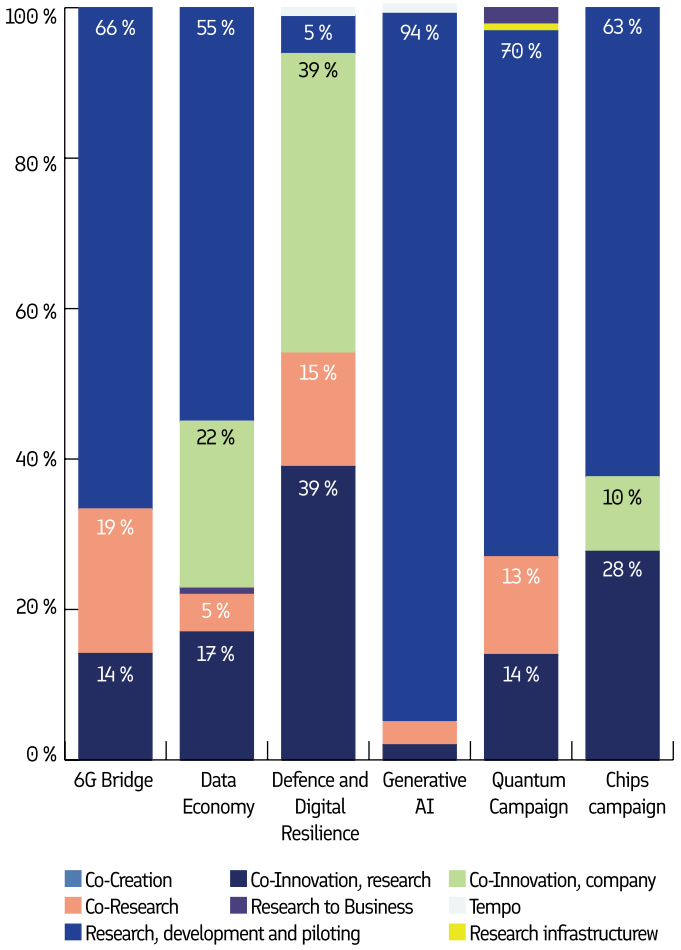


Figure 18. Utilisation of Business Finland's funding instruments (services) across the programmes and campaigns during 2022-2025. Source: Analysis based on Business Finland project data.

Table 6. Programmatic non-funded services. Source: Business Finland CRM. Note, there is some overlap with the programmes, i.e., same event might be tagged to more than one programme. Source: Analysis based on Business Finland project data.

ACTIVITIES / PARTICIPANTS	6G BRIDGE	DATA ECONOMY	DEFENCE AND DIGITAL RESILIENCE
Number of events / number of participants	49 / 2,781	31 / 2,344	24 / 2,066
Business Finland Ecosystems Building	1/238	-	-
Business Finland Government Official led Business Delegations / TF visits	2/37	-	3/87
Business Finland Program Activities (e.g., webinars, workshops and forums)	29 / 2,492	23 / 2,292	14 / 1,619
Business Finland Trade Mission	1/6*	-	2/16
Business Finland Level Event	-	-	1/306
Business Finland Local Networking Activity	-	-	1/19

*Includes also miscellaneous CRM activities not listed in the table

Besides funding, the programmes are offering other services, such as inbound and outbound missions and different events and workshops. Most commonly organised activities across programmes have been programme related webinars, workshops and forums which have reached out to over 6,000 participants. Additionally, there have been government official led Team Finland visits (two for 6G Bridge and three for Defence and Digital Resilience) and Business Finland's Trade Missions (one for 6G Bridge and two for Defence and Digital Resilience). The trips have reached out to a total of over 140 participants.

Programmes and campaigns offer both funding services and other services, such as events, delegations visits and workshops. Looking at how customers who have received funding are participating in other programmatic activities, the data shows that majority of them (56%) have not participated in any of the activities (blue bubble). Most of the funding customers that also participate in activities fall into category of participating in five or less activities (66/260) and they have one or two funding decisions. Altogether 32 companies have more than ten activity participations and those are also the ones having more than one funding decision.

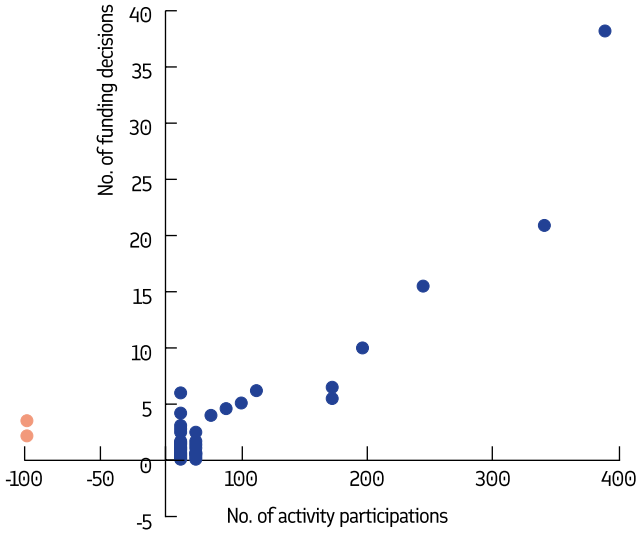


Figure 19. Cross-analysis of all funding customers and programme

The programme activities had a total of 1,430 unique customers, out of which 115 also received funding from the programmes and campaigns.

The analysis shows that it is quite rare that beneficiaries participate in other supporting programme activities. However, there are some outliers, that are active participants.

4.3. Feedback from programme beneficiaries and stakeholders

4.3.1. Defence & Digital Resilience Programme

The programme beneficiaries interviewed as part the of the evaluation regarded the programme as highly relevant and well-timed, addressing a strategic niche where Finland lacked comparable support structures. Beneficiaries – especially SMEs – emphasised that Business Finland's funding had been decisive for advancing early-stage dual-use and defence technologies. Instruments such as Tempo and Exhibition Explorer were particularly acknowledged for their accessibility, low bureaucracy, and catalytic effect on internationalisation.

Participants highlighted the quality of collaboration and dialogue with programme managers, describing Business Finland as pragmatic, responsive and knowledgeable. Business Finland's international reputation and clear funding processes were also appreciated. Events and delegations were seen as high-quality, practical and network-oriented, helping build trust with foreign customers and defence authorities.

However, several concerns were expressed. The discontinuation of Tempo and Exhibition Explorer created uncertainty and was viewed as a serious setback for SMEs, who depend on early-stage funding and market access support. Participants called for more hands-on activities such as joint experimentation, prototyping, in addition to webinars or publications.

Limited human resources within Business Finland and among stakeholders were recognised as constraining deeper engagement. Some smaller firms perceived the programme mainly as a funding channel rather than a community or programme they belonged to. Interviewees also warned that the defence theme may now dominate at the expense of digital resilience and a clearer coordination with the Defence Forces could improve the testing and procurement interface.

This programme received positive feedback for its timeliness and relevance in the current geopolitical context also in the stakeholder interviews. Stakeholders valued that Business Finland was able to connect innovation policy to national security and resilience issues, areas not traditionally within its remit. The initiative was seen as having significant future potential, especially in fostering cross-sectoral collaboration between the defence and technology communities.

4.3.2. 6G Bridge Programme

Interviewed programme participants considered the 6G Bridge Programme strategically relevant and well aligned with Finland's long-standing strengths in wireless communication. Interviewees highlighted the timeliness and global relevance of the theme and the high quality of events, materials, and international cooperation (e.g. with the US, Japan and Korea). Collaboration between participants was generally good, and programme managers were commended for maintaining active dialogue.

At the same time, some participants, particularly less active ones, experienced 6G Bridge mainly as a targeted funding scheme rather than a broader programme or ecosystem. Some interviewees were not fully aware that their projects belonged to it. Several mentioned the distinction between 6G Bridge, 6G Finland and other related networks, which sometimes created confusion.

Beneficiaries called for more *"doing" and cross*-sector *experimentation* beyond seminars – e.g. pilot projects connecting 6G with vertical industries such as manufacturing or defence. There were also appeals for more long-term and risk-tolerant funding instruments given the decade-long innovation cycle in this field. Some noted that semiconductors and microelectronics should feature more prominently as a complementary element.

Also, the stakeholders acknowledged 6G technologies as a strategically important topic, but it was perceived as distant from SMEs and applied innovation, as the technology still has a very long time-to-market.

4.3.3. Data Economy Programme

The Data Economy Programme was also widely seen as relevant and timely, focusing on key enablers such as AI, interoperability and data sharing. Participants commented the quality of events, communication materials and dialogue, and many reported concrete benefits such as new partnerships or product launches. More active participants particularly valued the openness of discussions and the competence of programme staff. Participants regarded the programme as an important and well-led initiative that helps steer Finland's digital transformation and underscores the importance of the topic nationally.

Nonetheless, several stakeholders – especially those less directly involved – experienced the programme as relatively abstract or distant. Some companies were not aware of their participation in the programme and viewed it merely as a source of funding. Additionally, concerns were raised about cuts to early-stage instruments (Tempo, NIY), which are particularly crucial for data- and AI-driven innovation.

Across stakeholder interviews, the Data Economy Programme was one of the most widely recognised initiatives. Stakeholders described it as an important initiative for strengthening Finland's position in data-driven innovation. The programme's relevance to both national competitiveness and EU digital priorities was repeatedly emphasised. Business Finland was credited for bringing concreteness to abstract policy discussions—particularly through its role in shaping the *Digital Compass* and the *Data Economy Growth Programme* (see also Chapter 3.2.1). At the same time, stakeholders called for greater visibility into the business impacts and success stories generated by the programme.

Many beneficiaries, including participants in other programmes, highlighted the importance of an approach that supports companies adopting digital technologies, rather than focusing solely on those developing them. Many were emphasising that Finnish industries tend to be quite conservative in adopting new technologies. Moreover, from the perspective of the developers of digital solutions, wide uptake is seen as an opportunity to increase demand. In this regard, Data Economy Programme was considered highly relevant, not only for the companies adopting digital technologies, but also for those developing them.

4.3.4. Generative AI Campaign

The GenAI Campaign was cited as a good example of agility and responsiveness by several participants and stakeholders. It was considered a demonstration of Business Finland's ability to react quickly to a changing technological environment. Participants appreciated the campaign's pragmatic focus on adoption and implementation rather than research, and the high quality of

events and materials. Programme managers were described as approachable, creating a positive dialogue with beneficiaries.

However, perceptions varied depending on engagement level. Active participants viewed the campaign as dynamic and valuable, whereas others regarded it primarily as a short-term funding window. As with other programmes and campaigns, some were unaware that their projects belonged to the campaign.

Some interviewees recommended more practical collaboration platforms where funded actors could exchange experiences and form partnerships, moving beyond webinars towards joint pilots and demonstrators. The need for stable, longer-term innovation funding was underlined, as cuts to early-stage schemes (e.g. Tempo) were seen as having the greatest impact on digital technology field.

For some, the campaign has helped to raise awareness of AI applications and initiated new discussions about practical use cases in Finnish companies. However, some participants characterised it as short-term and "symbolic" rather than a structural intervention. They expressed hope that such actions would evolve into longer-term support mechanisms or funding instruments for AI experimentation and adoption.

Overall, GenAI was viewed as a flexible and relevant initiative that should be sustained and scaled, with increased emphasis on cross-programme connections and experimentation.

4.3.5. Quantum Computing Campaign

Interviewed beneficiaries considered the Quantum Computing Campaign successful in both its content and execution. Beneficiaries highlighted its clear focus, timely scope and high-quality events and delegations. The campaign's emphasis on software and application development was widely applauded for complementing hardware-driven research and fostering a balanced national ecosystem. Business Finland was also considered a frontrunner with this focus, as many beneficiaries were reporting that as of now, there is a lack of EU level funding from development of quantum algorithms. Many reported also a good timing of the campaign. The quantum computers are currently still far from commercialisation, but at a stage where research-based use is available. This is widely seen as a window to start investing in quantum software.

Stakeholders commended the constructive dialogue and proactive support from programme managers, as well as the well-organised international missions (e.g. to the US, Korea, and inbound delegations). The combination of funding and networking was seen relevant and important for advancing a nascent but globally strategic field. Many reported significant benefits from participating in joint events and delegations with other programmes, such as the Defence and Digital Resilience Programme. Quantum technologies have strong synergies with other Digital Native Finland mission themes.

Some participants called for more cross-disciplinary experimentation and involvement of end-user sectors to accelerate real-world applications. Generally, it was considered that potential end-users, such as banks or other industries, remain relatively reluctant and insufficiently informed about the opportunities offered by quantum technologies, given their long time to market. However, the beneficiaries reported some improvements in this, largely due to the campaign activities. Several participants suggested that Business Finland could nudge the end users to start co-research or co-innovation projects in utilising quantum software. This would help the quantum software developers to access real-world opportunities to test their solutions.

Access to research infrastructures, such as quantum computers or LUMI supercomputer, was seen as a major benefit provided by Business Finland. This is also a unique competitive edge for Finland.

Business Finland resource limitations were again noted, but overall satisfaction with Business Finland remained very high: Business Finland's processes were considered lighter and more responsive than in EU frameworks, and the campaign was credited with enhancing Finland's international visibility and strengthening coherence in the field of quantum technologies.

Some stakeholders highlighted the importance of the topic for Finland's long-term technological capabilities and praised the complementarity

between Business Finland, VTT, and Tesi in this domain (e.g., IQM and National Quantum Strategy). They considered this a strong example of a new type of active industrial policy and collaboration across public sector clients.

4.3.6. Cross-cutting observations

Across all programmes and campaigns, several general findings and consistent patterns emerged:

Strengths

- All thematic areas were viewed as relevant and timely in light of global technological developments.
- Beneficiaries, particularly the core companies, expressed high satisfaction with programme leadership, quality of materials, and Business Finland's professionalism.
- The flexibility and responsiveness of Business Finland, exemplified by the Defence and GenAI initiatives, were widely praised.
- Beneficiaries highlighted the fact that each programme or campaign has a designated leader or a single contact point as a significant added value. It was always clear whom to contact, and the programme leads were considered highly dedicated.
- Events and delegations were perceived as high-quality and high-impact networking platforms.
- Strong focus on R&D, success in attracting R&D applications and initiating new R&D projects.
- LCI (Veturi) funding was praised by many stakeholders and beneficiaries – but its link to mission and programmes is seen unclear, and it is considered less feasible for the software economy where there are no clearly defined leading companies. In addition, beneficiaries would prefer a more balanced ecosystem-based approach.
- The mission programmes and campaigns are promoting solutions with very different time-to-market, from quantum to practical applications of AI. This was seen as a strength, but also as a challenge from the perspective of cross-programme synergy. For instance, quantum technologies are seen as having obvious synergies with the other programmes. However, the fact that the quantum technology is currently so far from the market, makes it somewhat difficult to have synergies with other programmes. Overall, beneficiaries considered it a strength that Business Finland supports a wide range of solutions and technologies with a varying degree of maturity.
- Active participants, particularly those engaged in events and delegation visits, perceive greater added value in the programmes or campaigns compared to less active participants. The active participants are reporting several benefits beyond funding, e.g., increased networks in Finland and abroad, increased visibility and increased knowhow.
- Participants in programmes or campaigns supporting technologies with longer time to market (such as quantum and 6G) praised Business Finland for its role as a forerunner. For instance, participants in the Quantum Campaign reported that the emphasis on quantum software (e.g., algorithms) is a novel approach and is not currently funded at the EU level. Similarly, participants in 6G Bridge noted that Finland has taken a leading position in the field and has succeeded in placing the topic on the EU agenda.

Improvement opportunities

- Engagement level strongly shapes perceptions: less active beneficiaries often see programmes merely as funding channels.
- Awareness of programme or mission affiliation remains limited among some participants.
- Resource constraints within Business Finland hinder programme implementation and more proactive support.
- Participants are consistently calling for more concrete, hands-on experimentation and joint testing environments ("less paper, more doing")

- The loss of early-stage funding instruments (Tempo, NIY) is seen as a significant risk, especially for SMEs in fast-moving digital domains.
- The ambiguity between mission and programme levels: Stakeholders and beneficiaries are unsure about the role of different “strategic levels”. This contributes to a perception of fragmentation.
- Several participants across programmes and campaigns are reporting a need for greater awareness of what other companies or research organisations are doing in Finland. Several also pointed out that they would greatly benefit from Business Finland informing them about R&D projects relevant to their work. Moreover, many considered that it would be beneficial if Business Finland communicate more actively to wider audiences (general public, industry federations, public sector etc.) about success cases.
- The focus has primarily been on R&D, which represents only one dimension of the broader challenges addressed by the mission.

5. Conclusions and Recommendations

5.1. Conclusions

5.1.1. Mission-level conclusions

The mission has generated added value internally, but strategic alignment within Business Finland has remained complex

The DNF Mission reflects a bold and forward-looking interpretation of mission-oriented innovation policy, consistent with international developments in systemic digital transformation strategies. Its thematic scope, i.e., spanning AI, data economy, 6G, quantum and defence technologies as well as digital resilience, allowed Business Finland to position itself within the digitalisation domain and to articulate a long-term vision for Finland's digital competitiveness.

The mission has helped foster collaboration across digitalisation-related programmes and thematic areas, offering a shared umbrella that has encouraged joint planning and cross-organisational dialogue. The DNF Mission has enabled collaboration across service areas and enhanced visibility of interlinked themes such as AI and data economy, or 6G and digital resilience. The mission has also played an important role in initiating new

programmes and campaigns, providing a framework for prioritising emerging topics.

However, achieving strategic alignment within Business Finland has proved challenging. The interplay between mission-level strategic steering and service-area operational responsibility has created ambiguity, especially as Mission Leads are lacking formal authority, clear mandates or dedicated resources within Business Finland – let alone regarding the development of the broader operational environment. The matrix structure has often diluted accountability and required mission progress to depend on voluntary cooperation rather than institutionalised processes. This has led to uneven uptake across units and limited the mission's ability to consistently influence decision-making, resource allocation or portfolio development.

At the same time, maintaining and strengthening digital competitiveness will inevitably demand a broader foundation than these thematic areas alone. While the mission provides a strong strategic anchor around selected frontier technologies, long-term competitiveness also relies on complementary enablers such as skills development, adoption capacity in firms, data infrastructure maturity, regulatory agility and the diffusion of digital innovation across sectors. While the DNF Mission has been actively engaged in discussions around these broader topics, its tools are inevitably too narrow to drive these broader transformations.

The mission has created value for stakeholders as a strategic umbrella, yet it has remained largely invisible to beneficiaries

Stakeholders perceive the mission as an important strategic frame that brings coherence across Business Finland's digitalisation activities. It has helped connect Business Finland's work to national and EU-level digitalisation policy agendas, provided continuity in thematic priorities, and strengthened Finland's international visibility in technologies such as AI, quantum and digital resilience. The mission has also offered a platform for policy dialogue, allowing Business Finland and partners to engage in longer-term discussions that transcend individual projects or programme cycles. Stakeholders also recognise the mission as an ambitious and modern policy instrument that elevated digitalisation as a national priority. The role and contribution of the Mission Lead have been highly valued by all stakeholders.

For most beneficiaries, however, the mission remains distant and largely invisible. Companies and research actors typically interact only through specific programmes or campaigns, with limited understanding of the mission structure or how it influences their opportunities. The terminology of "missions", "programmes" and "campaigns" is often confusing in practice, partly because the underlying mission theory – distinguishing a mission from a traditional strategic priority or thematic focus – is not clearly communicated or operationalised. As a result, the distinct added value of the mission – beyond traditional Business Finland programme-level activities – is not easily perceived outside the core companies (those in the mission Advisory Board). Overall, while stakeholders see the mission as a useful strategic umbrella, most beneficiaries experience little direct benefit from the mission as a separate organisational layer. In hindsight, a less ambitious and a more practical and operational concept (e.g. "thematic priority area") could have been a more feasible approach.

Practical implementation of the mission has been constrained by limited resources and lack of system-level instruments

The mission's implementation has relied heavily on individual leadership and informal networks rather than on established institutional structures. Mission Leads have operated without dedicated budgets, formal authority or integrated support functions, making it difficult to steer activities or enforce alignment across programmes or within the Business Finland strategy implementation.

Integration with Business Finland's funding instruments and portfolio management has also been inconsistent. Large instruments, particularly the LCIs, have not been fully aligned with mission priorities. In general, the LCI instrument is seen as an important and highly relevant instrument for industries where clear leading companies exist, but

less feasible e.g. in the software industry where such companies do not exist. In addition, SMEs reported challenges accessing suitable early-stage funding due to the discontinuation of key innovation funding instruments. This has weakened the mission's ability to drive experimentation, emergence of new ecosystems or broader behavioural change.

Feedback from stakeholders also indicates that traditional programme activities do not sufficiently support rapid experimentation in fast-moving domains such as AI. There is a need for activities that support quick testing, iteration and collaborative piloting, especially for SMEs. The idea of a "Business Finland Lab" model was raised as a potential way to facilitate concrete experimentation and cross-sector co-creation.

Overall, the mission's strategic role has been recognised, but its operational impact has been hindered by resource constraints, fragmentation and the absence of mechanisms that would allow it to shape the broader landscape in line with its objectives.

Digital Native Finland mission has formalised an existing focus of the Business Finland activities rather than redirecting the portfolio

The findings of the textual analysis indicate that the Digital Native Finland mission formalised an existing focus in Business Finland's activities rather than redirecting the portfolio. This is evidenced, on the one hand, by the fact that mission-related themes were already substantially covered in Business Finland's project portfolio before the mission was introduced in 2022 and, on the other hand, by the absence of a structural break in the share of digital projects following the mission's launch.

The timing of trends in the alignment of Business Finland's portfolio with specific programmes and campaigns suggests that external shocks and developments have played a stronger role than the mission itself in redirecting the project portfolio. Developments such as the emergence of generative AI, the renewed urgency of defence-related projects following Russia's invasion of Ukraine, and the COVID-19 pandemic appear to have driven the refocusing of funded activities.

Digitalisation themes also cut across multiple missions. Substantial overlap is observed in the project portfolio between projects classified as relevant to the Digital Native Finland mission and those linked to other missions with strong digital components, such as Immersive Digital Life and Healthcare Reimagined.

5.1.2. General programme-level conclusions

The programme portfolio is thematically relevant and well-received, but participation in programme activities has varied significantly

Across the portfolio, programmes and campaigns are regarded as timely and aligned with technological and market trends. Beneficiaries consistently commend Business Finland's professionalism, quality of events and responsiveness. The themes – 6G, data economy, defence and resilience, AI and quantum – are widely viewed as strategically important both for Finland's competitiveness and for resilience in a shifting geopolitical environment. A notable advantage of the portfolio is its ability to address technologies at different stages of maturity while simultaneously supporting both technological development and early adoption. This has been particularly visible in areas such as the Data Economy and Generative AI.

The programmes and campaigns have also proven effective in stimulating substantial application activity, thereby channelling significant RDI funding to companies and research organisations. In practice, they are considered by many primarily as "activation/marketing tools" to Business Finland's R&D funding. However, many participants (in all programmes or campaigns) are unaware that their projects belong to a specific programme, and even fewer recognise the connection to the mission structure. Less active beneficiaries often perceive programmes as funding schemes rather than broader strategic initiatives. This uneven visibility limits the programmes' ability to support networking, cross-learning or joint activities.

The programme activities are valued, but engagement has remained shallow for many beneficiaries

Programme services such as events, delegations, forums and workshops are consistently commented for quality and practical usefulness.

Active participants report strong value from networking, international missions and dialogue with programme managers. These activities help keep strategic themes on the agenda and support Finland's international visibility in emerging technologies. Business Finland also offers access to research infrastructure, such as LUMI and the VTT quantum computer, which have been highly important for some customers and represent a unique competitive advantage for Finland.

However, participation in programme activities remains limited: most funding customers do not engage in any programme events, and only a small share (44%) of beneficiaries combines funding with active participation. This pattern suggests that programme activities reach only a narrow community of highly engaged actors, limiting wider impact. Resource limitations within Business Finland further constrain the ability to provide more hands-on support or continuous engagement.

The programmes and campaigns have worked effectively with existing ecosystems, reinforcing Business Finland's role as an enabler rather than a primary driver

The mission, programmes and campaigns have collaborated closely with established industry and research ecosystems (e.g. 6G Finland or AI Finland). This collaboration has ensured that activities remain relevant, well-grounded and connected to real market and technological needs. These practices highlight Business Finland's role as a facilitator and enabler, rather than the main driver or thought leader behind technological trends. Interviewees emphasised that sectoral direction, technological insight and strategic momentum typically originate from companies and research actors, with Business Finland's role centred on coordination, support, and the creation of opportunities.

Funding instruments and portfolio structures have constrained the programmes' ability to achieve full impact

Several programmes rely on early-stage, low-bureaucracy funding to support SMEs and emerging technologies. The discontinuation or budget cuts of instruments such as Tempo and Exhibition Explorer are therefore a major setback for the programme beneficiaries. The current instrument portfolio favours large companies, leaving limited options for smaller actors and incremental, experiment-oriented work.

A common bottleneck for especially emerging technologies is finding end-user partners for co-research/co-innovation projects and customers. Many beneficiaries expressed the hope that Business Finland could support and de-risk the end user companies (e.g. banks using quantum algorithms) to encourage collaboration with SMEs working in emerging technologies. This is in line with the above-mentioned conclusions regarding the lack of system-level instruments and experimentation.

5.1.3. Programme-specific conclusions

6G Bridge Programme

The programme is seen as strategically important and internationally credible, and it builds on Finland's strong wireless technology heritage. Beneficiaries value the quality of cooperation, events and international activities. However, awareness of programme affiliation is uneven, and some perceive the programme primarily as a funding instrument rather than a broader ecosystem. Close alignment and collaboration with the 6G Finland network ensure that the programme is reflecting the needs of the industry but also creates some confusion externally. Some stakeholders also call for more cross-sector pilots, experimentation environments and semiconductor-related activities.

Data Economy Programme

The programme benefits from a strong policy foundation, including the Data Economy Roadmap, and is viewed as highly relevant for Finland's competitiveness. It supports key national and EU priorities and contributes to agenda-setting across the digital domain. The challenges relate more broadly to Business Finland–level issues, such as unclear differentiation between mission and programme levels, uneven visibility among beneficiaries, and

funding instruments that do not sufficiently meet SME needs. Some stakeholders call for a more software-focused programme or similar activities within the Data Economy Programme.

Defence and Digital Resilience Programme

The programme is widely regarded as timely and strategically important for Finland. While the integration of defence topics into the programme is seen as an important national priority and a good example of agility in programme planning, some beneficiaries consider the defence focus too dominant given its distinctive nature and business logic.

Business Finland funding has been important in advancing dual-use and defence technologies. Programme management, international missions and collaboration are also highly appreciated. Discontinuation of early-stage instruments (Explorer, Talent, NIY) and resource limitations within Business Finland hinder impact. Beneficiaries call for more practical experimentation, prototyping opportunities and even further coordination with defence authorities.

Generative AI Campaign

The AI Campaign is considered relevant, flexible and highly responsive to fast-moving technological developments. Its format and agility are valued by participants, and there is strong support for sustaining and scaling the initiative. There is a need for more cross-programme connections and more hands-on experimentation environments.

Quantum Computing Campaign

The campaign is viewed as a focused and high-quality initiative that complements Finland's strong hardware-driven quantum ecosystem by emphasising software and application development. International missions, programme management and stakeholder collaboration are valued by the beneficiaries. Improvement needs relate to cross-disciplinary experimentation, integration of related areas such as semiconductors, and addressing resource limitations within Business Finland.

5.2. Recommendations

The recommendations focus specifically on strengthening Business Finland's role in advancing digitalisation, including the development of related programmes and the overall digitalisation portfolio. Recommendations concerning the mission model and thematic steering mechanisms are addressed separately in the joint synthesis report of the two parallel evaluations.

Recommendation 1. Sustain long-term focus on digitalisation as a national competitiveness priority

Digitalisation, data economy, AI, 6G and quantum technologies (and related software development) as well as the digital resilience are long-term drivers of Finland's productivity, competitiveness and technological sovereignty. Business Finland should continue to articulate and champion these priorities regardless of any conceptual changes to the mission model. This includes sustaining an outward-facing agenda that positions Finland internationally and supports alignment with national strategies such as the Digital Compass, Data Economy Growth Programme and emerging EU priorities.

Recommendation 2. Enhance Business Finland's role as an enabler of ecosystem-driven digital innovation

The evaluation shows that successful programme and campaign activities were closely tied to existing ecosystem strengths (e.g. 6G Finland, AI Finland, quantum ecosystem, defence–tech networks). Business Finland should reinforce this enabling role by systematically co-developing activities and partnerships with leading industry and research network to ensure relevance, accelerate uptake and leverage industry-led directionality in emerging digital domains. In practice, it could mean for example structured ecosystem partnerships, joint planning with cluster organisations, ecosystem advisory boards, and shared experimentation platforms, as well as consideration of these types of activities in its funding instruments.

Recommendation 3. Maintain Business Finland's contribution to policy dialogue and agenda-setting in digital fields

Stakeholders value Business Finland's contributions to national and EU-level policy processes (e.g. Data Economy Roadmap, Digital Compass).

Business Finland should continue taking an active role in shaping strategic narratives, providing evidence, and linking policy objectives with concrete programmes and company-level actions. Maintaining this interface supports coherence across Finland's digitalisation landscape, even if the mission concept is not continued.

Recommendation 4. Expand hands-on, experimentation-oriented activities within programmes

Feedback across programmes highlighted the need for more practical, experimentation-oriented approaches – rapid pilots, prototyping, joint testing environments and sandbox-type facilities. Business Finland should integrate these elements more systematically into programmes, especially in fast-moving areas such as AI.

Recommendation 5. Refine the LCI instrument to better accommodate different digital industry structures

The Leading Company Initiative (LCI) is effective in sectors where clear leading companies anchor ecosystems, but it is less suitable for fields such as software and data-driven industries, where innovation is distributed across many small and mid-sized firms. Business Finland should refine the LCI instrument or create complementary mechanisms that enable ecosystem development without relying on a single dominant company. This could include more flexible consortium models, ecosystem-led approaches, or scaled-down instruments designed for domains with fragmented industry structures.

Recommendation 6. Address funding gaps that hinder early-stage digital innovation

The discontinuation of early-stage instruments (Tempo, Explorer, NIY) has weakened Business Finland's ability to support emerging digital companies. Business Finland should either reinstate these instruments or develop alternative light, fast mechanisms for experimentation, early-stage R&D, internationalisation and capability-building. Ensuring that SMEs have access to suitable tools is essential for sustaining Finland's digital innovation pipeline.

Recommendation 7. Strengthen programme identity and clarify the link between funding and programme participation

In many cases, companies were formally assigned to a programme because they received funding routed through it, even though they did not participate in the programme's activities or perceive themselves as programme members. This weakens programme cohesion and limits opportunities for learning, networking and strategic influence. Business Finland should therefore clarify the distinction between funding allocation and actual programme participation, ensure that beneficiaries are explicitly onboarded into programme activities, and clearly communicate what being part of a programme entails. Strengthening this link is essential for building coherent, engaged programme communities.

Recommendation 8. Maintain coordination across programmes to reduce fragmentation and leverage synergies

Digital themes often cut across multiple programmes (e.g. AI across Data Economy, Defence & Resilience and 6G). To prevent fragmentation, Business Finland should – regardless of the future of the mission concept – maintain cross-programme coordination through shared planning, joint roadmaps, cross-programme, developing and monitoring KPIs, peer learning, working groups or combined activities. This helps to ensure strategic consistency and makes more effective use of limited resources.

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