

Department for Research, Innovation and Business Development

Programme Description: Sustainable Battery Value Chain – Enhancing Energy and Resource Efficiency through Circular Processes

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Summary

This program description aims to provide support for stakeholders along the battery value chain who are interested in the initiative, as well as to support the Swedish Energy Agency in its ongoing work and in the follow-up and evaluation of the program.

Through the research program Sustainable Battery Value Chain, the Swedish Energy Agency seeks to enable collaboration between various actors in the battery value chain, build attractive research environments to attract and retain talent, and ensure a foundational flow of knowledge and academic expertise to meet both growing knowledge demands and future growth opportunities. The program is one of Sweden's main initiatives in battery-related research and development. The initiative focuses on the battery value chain's role from a systems perspective, alternative and complementary battery technologies, and resource- and energy-efficient manufacturing processes throughout the entire battery value chain, including recycling. These are highlighted as some of the major challenges where continued research and innovation are needed.

A core principle of the program is that the various parts of the battery value chain must be resource- and energy-efficient, and system-efficient—the entire value chain should be sustainable.

The program also emphasizes long-term academic competence development and cross-cutting battery research to complement existing initiatives that are more focused on applied research in specific parts of the battery sector. Within the program's context, international collaborations are also important, both among researchers and between academia and industry.

The **Sustainable Battery Value Chain** program was launched in 2024. It runs from June 1, 2024, to December 31, 2030, and has a budget framework of 348 million SEK. The majority of the program's funds are distributed through one or more open calls for proposals per year, which focus on identified thematic needs.

Follow-up and evaluation will be based on the program's direction, goals, and criteria, using performance metrics and indicators. The program is intended to be evaluated in 2027 and extended if justified.

The initiative is based on the Swedish Energy Agency's existing research appropriations. The program's budget aligns with the government's 2024 energy research bill and the agency's priorities. The aim is to create a flexible program with the capacity to respond to future needs through the program itself and also through complementary initiatives and collaboration with other research funders.



Complementary investments in research and innovation in the battery sector are critical for both Swedish competitiveness and growth, as well as for sustainable electrification of transport and a resilient energy system. Any additional initiatives will be prepared separately.

The strategic program council has an advisory role in the strategic work based on the program's orientation. The ongoing work is led by a dedicated program management team and focuses on i) Continuous monitoring of relevant developments, ii) Knowledge base and syntheses, iii) Communication of results and iv) International collaboration.

Program Orientation

The Swedish Energy Agency assesses that research funding in the battery field is needed to enable collaboration between various actors in the battery value chain, build attractive research environments to attract and retain talent an ensure a foundational flow of knowledge and academic expertise to meet both increasing knowledge demands and future growth opportunities. To ensure continued academic competence development, a long-term investment is essential.

The program is based on both new and existing active battery materials and chemistries, as well as the manufacturing of cells, packs, and systems—including battery and battery material recycling. How the various parts of the value chain are connected from a flow perspective is illustrated in Figure 1.



Figure 1. Schematic Illustration of the Sustainable Battery Value Chain

The need for research in the aforementioned areas is increasing both in Europe and globally. This includes research on the battery value chain's functionality from a systems perspective and on policy development. The program also



focuses on long-term academic competence development and bridging battery research to complement existing initiatives that primarily focus on applied research in specific battery areas. In this context, international collaboration is also important—both among researchers and between academia and industry. Given this background and in response to the identified need for long-term, program-based research in the battery field, this new program is being established.

Background

The Swedish Energy Agency works to support the transformation of the energy system. This transformation requires the development of new technologies and value chains. This in turn creates a need for new resource flows, business models, skills, and ecosystems of actors. Batteries are a key technology in the energy transition. Sweden's battery industry is growing and needs the right conditions to continue doing so, as it is a crucial part of the transition to a fossil-free future.

A growing and differentiated demand is opening up new fields of research, while existing ones expand across the TRL (Technology Readiness Level) scale. Continued and reinforced investments are required across many areas if the industry is to keep evolving and contribute to Swedish growth and competitiveness. As a research funder, the Swedish Energy Agency promotes relevant research and innovation in the battery sector through various funding instruments, in close coordination with other energy policy initiatives and regulatory measures.

The importance and need for continued and strengthened long-term, programbased research in the battery sector has been highlighted at multiple levels and by various stakeholders: The European Commission has identified the battery value chain as a strategic value chain requiring enhanced innovation efforts and investments. The European Court of Auditors, in a special report on EU battery industrial policy, identified a need for new strategic incentives.¹ The function of the battery value chain from a system perspective, alternative and complementary battery technologies, as well as resource- and energy-efficient manufacturing processes throughout the entire battery value chain, including recycling, are highlighted as some of the greatest challenges where research and innovation are needed.²

¹ European Court of Auditors p rovides a summarizing overview of the battery field, evaluates the EU's efforts, and offers recommendations for the future.

https://www.eca.europa.eu/ECAPublications/SR-2023-15/SR-2023-15_SV.pdf

² BATT4EU's Strategic Research and Innovation Agenda (SRIA) was released in 2024. In the latest SRIA from the Batteries European Partnership Association (BATT4EU), the technical perspectives and needs within the battery field are assessed.



Nationally, the Swedish Energy Agency - through its input to the 2024 energy research bill, and previously in collaboration with the Swedish Environmental Protection Agency (Naturvårdsverket) and the Geological Survey of Sweden (Statens geologiska undersökning) - has identified needs, opportunities, obstacles, and proposals for strengthening research and innovation related to batteries.^{3,4} Industry stakeholders have also called for long-term competence development, for example through the Fossil Free Sweden initiative.⁵ According to analysis commissioned by the Swedish Energy Agency, the broad and long-term orientation of the previous battery fund program contributed significantly to building academic competence and competitive battery research in Sweden.⁶ These needs are reflected in the Swedish government's 2024 budget bill as well as the 2024 research and energy research bills.⁷ Additional needs are continuously analyzed and discussed.

Impact Chain

The program is based on the Swedish Energy Agency's impact chain, as shown in Figure 2 below (Swedish only). The impact goals are the energy and climate policy goals that both the agency and the program ultimately aim to support, in addition to the three pillars of energy policy: Security of supply, Competitiveness and Ecological sustainability.



Figure 2. The Swedish Energy Agency's Impact Chain.

The program also contributes to industrial, research, and environmental policy goals, as well as selected global sustainable development goals (Agenda 2030).

³ EFoI-documentation, Fall 2023.

⁴ The battery collaboration assignment, October 2022

⁵ Fossil Free Sweden strategy/actionplan.

⁶ McKinsey & Co, 2024-205906, Public funding for battery R&D in Sweden: The role of the Swedish Energy Agency, commissioned by the Swedish Energy Agency, June 2025. The analysis is based on a review of funding data, a mapping of battery-related publications, and interviews conducted with several academic representatives of Swedish battery research.

⁷ Ref to the three.



A sustainable battery value chain specifically contributes to energy and climate targets, strengthens Sweden's competitiveness and supply security, and works to minimize environmental and health problems in Sweden and abroad.⁸

Vision

The program's vision is to, through research-related efforts in the battery field, "develop and enable Sweden's share of a sustainable European battery value chain."

Outcome Goals

The program's long-term objective is to increase energy and resource efficiency and circular processes along Sweden's part of a sustainable European battery value chain, thereby contributing to sustainable electrification of transport and a resilient energy system. It also aims to contribute to attractive research environments and increased utilization of research results in Sweden.

The specific outcome goals are to contribute to:

- The development of new and improved cost- and resource-efficient battery concepts for storage and use in power systems, vehicles, and vessels.
- The advancement and availability of world-leading knowledge and expertise among Swedish researchers and companies in:
 - Mature and emerging battery technologies for use in electric systems, vehicles, and vessels
 - Energy- and resource-efficient processes for producing components, cells, or raw materials for cells
 - Sustainable and cost-effective recycling processes and methods
- The development of close collaboration and active networks between academia and industry, and an expansion of battery research activity within both Swedish companies and academic institutions.
- Expanded Nordic and international research collaboration around the battery value chain
- The production of relevant knowledge bases for policy development

In the longer term, the program is also expected to contribute to building knowledge and competence within both the private and public sectors regarding a sustainable battery value chain.

⁸ Energimyndigheten, Naturvårdsverket and SGU, Batteriyreport, October 2022.



Research and knowledge needs vary depending on battery chemistry and technology, as well as the needs for new competencies, collaboration, and policy development.

Results in Focus

The program focuses on strengthening knowledge and competence in the field of batteries, with particular emphasis on academic research and researcher qualification. It aims to enhance collaboration around applied research that addresses the need for scaling up technologies and processes in areas where there are active industrial stakeholders in Sweden. Additionally, the program seeks to improve knowledge bases that support policy and regulatory development. The program's goals and emphasis on building expertise, developing new and improved battery concepts, increasing the practical use of research results, and fostering international cooperation align with national objectives for research and innovation in the energy sector.⁹

The program provides funding for research projects within areas such as the development of new battery materials and chemistries, battery recycling and reuse, safety issues, and the development of methods and tools for battery system modeling. It also supports related areas, including the further development of existing battery materials and chemistries, battery diagnostics and measurement, battery control and application, and other subjects relevant to the program's intended outcomes. In addition to research projects, the program funds knowledge syntheses, feasibility studies, and policy analyses.

A selection of areas that the program can fund is listed below (in no particular order):

- Development of methods and tools, such as life cycle analysis and technoeconomic analyses, system models related to battery manufacturing and design to examine social, environmental, and economic sustainability.
- Knowledge about developed analytical tools for compliance with upcoming standards, regulations, and other policy instruments.
- Syntheses that describe the current state of knowledge and knowledge gaps in the battery field where information is currently lacking:
 - Requirements and research needs for battery technology for stationary storage.
 - Safety aspects in recycling, production, and for stationary storage.
 - Development of methods and tools, such as life cycle analysis and techno-economic analyses, system models related to battery

⁹ 2024/25:72 Forskning och innovation på energiområdet för försörjningstrygghet, konkurrenskraft och klimatomställning - Regeringen.se



manufacturing and design to examine social, environmental, and economic sustainability in these areas.

- Feasibility studies for the development of battery technology that can be scaled up, and projects aiming for later funding under other programs.
- Projects focusing on practical, behavioral, or regulatory factors that can accelerate or hinder production or efficient production processes (from material extraction to the manufacturing of batteries and battery-based products), use, reuse, and recycling of batteries.
- Projects that can contribute to position the Swedish and European battery value chain in an international context. For example, mapping technologies and applications in different parts of the world, as well as studies of the import and export of primary and secondary raw materials, finished and used products, and the technical, economic, political, and social drivers and barriers behind this development.
- Projects on cell and battery system modeling, and the connection between them.
- Development of modeling tools for battery technology.

The program aims, in its initial phase, to develop key figures and indicators for monitoring the program's results. The intention is to continuously follow up on the program's outcome goals for effective planning of interventions.

Related initiatives at the agency concerning the battery sector

At the agency, many different activities are underway that are relevant to the program's focus and approach. There are needs and connections within the areas of transportation, the electricity system, industry, product development, as well as market, modeling, and analysis. Examples of the agency's ongoing activities in the battery sector include program initiatives, assignments and projects, work on policy development of regulations, as well as implementation and administration.

•••	
Program	Hållbara transportsystem, Framtidens elsystem, Fordonsstrategisk forskning och innovation, Impact Innovation – Swedish Metals & Minerals, Impact Innovation – Net Zero Industry, Impact Innovation, Människa Energisystem Samhälle, Bio+, Industrins energi- och klimatomställning, Pilot- och Demo, Svenskt elektromobilitetscentrum, Svenskt centrum för el-energilagring och balansering, among others. Horisont Europa, EU:s innovationsfond, IEA tekniksamarbeten.
Assignments and Projects	Lägesbild Hållbar batterivärdekedja, Samordning uppbyggnaden av laddinfrastruktur Batteriarena among others.
Regulations	FitFor55, AFIR, Batteriförordning, Critical Raw Materials Act (CRMA), NetZero Industry Act (NZIA), among others.
Implementations	Regionala elektrifieringspiloter, EPBD, REDIII, Industriklivet, drivmedelsrapportering, stöd till ellastbilar, among others.

Table 1: Examples of the agency's ongoing activities in the battery sector,	spring 2025 (Swedish
only)	

Ongoing R&D Programs in Sweden in the Battery Sector

The Sustainable Battery Value Chain Program, with its emphasis on academic research and merit-building, constitutes a central pillar in the agency's overarching R&D initiatives. It is the combined focus on academic excellence and broad, overarching scope within the battery field that makes the program unique compared to other ongoing initiatives, which do not focus on the battery sector in the same way. Like the previous Battery Fund Program, the new program also serves as a long-term complement and overarching framework to other ongoing initiatives, ensuring that the agency's total portfolio covers both the entire TRL (Technology Readiness Level) scale and the entire battery value chain.

The following figure presents a schematic illustration of where various program initiatives related to the battery sector are positioned in terms of technology maturity. The figure includes both the Swedish Energy Agency's and other national research funders' programs that currently include or may include battery-related research. There are additional areas and initiatives that, to varying degrees, are connected to the battery sector in different ways. For example, research on charging infrastructure is linked to the program at the system level and is included, among others, within FFI (Strategic Vehicle Research and Innovation).¹⁰



Figure 3. Selection of ongoing government-funded R&D initiatives relevant to the battery field (Swedish only)

¹⁰ Read more about the Swedish Energy Agency's research areas and initiatives under <u>Forskningsområden</u> (energimyndigheten.se) 2024-04-23.

The Swedish Research Council's initiatives support fundamental research through various tools. FFI (Strategic Vehicle Research and Innovation) and Framtidens elsystem may include applications and implementations of battery systems and solutions in the transport and electricity sectors, respectively. Bio+ supports research and innovation projects on bio-based battery materials. Pilot och demonstration efforts help rapidly scale up and test potential applications in various areas. Industrins energi- och klimatomställning and Industriklivet focus on strategic shifts within industry that can lead to significant reductions in climate emissions. Battery research at the Swedish Energy Agency (2025–2030) is emphasized multiple times, indicating a strong focus during this period. Vinnova is conducting a targeted initiative on scaling and testing concepts in realworld environments to boost innovation capacity and capability across the entire battery value chain. The joint initiative Impact Innovation by Vinnova, Formas and the Swedish Energy Agency focuses on accelerating the transition through challenge-driven research, innovation, and stakeholder collaboration. Two initiatives connected to the battery value chain are: Metals & Minerals, which brings together the steel, mining, and processing industries and Net Zero Industry, which brings together major Swedish manufacturing industries. Among previous strategic innovation programs, some battery-related research projects have been funded through, for example, SMI, Sio Grafen, BioInnovation, and RE:Source.

To promote collaboration and faster scaling from the lower TRL levels in the new battery initiative to the more application-oriented efforts, cooperation and cross-communication are needed.

Competence Centers

Competence centers¹¹ and knowledge nodes bring together relevant stakeholders and offer not only valuable insights and up-to-date research findings but also opportunities for consultation and collaboration. Dialogue is important as the areas of activity overlap, making it necessary to have insight into each other's portfolios to avoid duplication of efforts. Knowledge carriers from these networks can, for example, be invited as experts or evaluators in the program.

The competence centers most relevant to the battery field are: BASE (Vinnova), Swedish Electromobility Centre (SEC) and Swedish Centre for Electricity Storage and Balancing (SESBC). Additionally, Resilient Energy Systems, SOLVE, and Hydrogen work with parts of the energy system where batteries play an important role.

¹¹ Kompetenscentrum (energimyndigheten.se)

Status Description for the Development of a Sustainable Battery Value Chain

The ongoing government assignment during 2024 and 2025 aims to produce a status overview using a set of indicators and will contribute with a knowledge base for the battery value chain. The information from this effort is relevant for battery research and is expected to support the planning of the program's initiatives.

Battery Arena

In 2024, the agency launched the initiative Battery Arena to bring together stakeholders across the entire battery value chain and to find joint solutions to issues that can strengthen Sweden and the Nordic region in the global battery industry. The initiative includes, among other things, coordination of actors and a digital platform that gathers relevant and up-to-date information in the battery field. The program's activities and results will contribute to the development of the arena in selected areas. At the same time, activities and results from Battery Arena will help develop the program. These connections are described in more detail under the *Communication and Dissemination of Results* section.

Reasons for the Decision

The Sustainable Battery Value Chain Program is one of Sweden's main initiatives for battery-related research and development. The program's longterm goal is to contribute to competitiveness, security of supply, and ecological and social sustainability through battery-related research and academic capacity building. The program's objectives—focused on building knowledge and expertise, developing new and improved battery concepts, utilizing research results, and increasing international collaboration—are aligned with the outcome goals for research and innovation in the energy sector.

Implementation

Between 2013 and 2023, the Swedish Energy Agency funded battery-related research through the Battery Fund Program, using resources from the battery fund. The **Sustainable Battery Value Chain** program is a continuation and further development of that initiative.

Timeline and Budget

The program was launched in 2024 as a six-year initiative, running from June 1, 2024, to December 31, 2029, with an initial budget of SEK 160 million and the intention to announce funding opportunities at least once per year. In the first call for proposals (June–August 2024), SEK 50 million was initially announced. The call received high interest, with applications totaling approximately SEK 310



million, and most were of high quality. In autumn 2024, around SEK 59 million was granted to 13 projects.

In spring 2025, the program was extended to December 31, 2030, and the budget increased to SEK 348 million. The second call opened in May 2025, with an enhanced budget of SEK 120 million. A third call is planned for Q1 2026, and a fourth is expected in spring 2027. These calls are combined with other tools, such as knowledge syntheses, based on identified needs. Each call contributes to one or more of the program's goals and may include both national and international collaborations. The program's purpose and goals are continuously monitored and adjusted as needed.

Year	New budget	Previous program budget		
2024	11 199 181 SEK	8 500 000 SEK		
2025	54 000 000 SEK	7 000 000 SEK		
2026	71 000 000 SEK	24 000 000 SEK		
2027	79 000 000 SEK	35 500 000 SEK		
2028	63 000 000 SEK	45 000 000 SEK		
2029	46 000 000 SEK	40 000 000 SEK		
2030	23 800 819 SEK	-		

Table 2. The program's budget

Table 3. Planned allocation of the budget between initiatives.

[Million SEK]	2024	2025	2026	2027
Calls	59,4	120	80	80
Program related costs	-	2	3,5	3,1
(Reviewer fees, program conferences and knowledge syntheses)				

Part of the program's budget will be used for international initiatives with potential for scaling up.

Strategic Council

The program has a Strategic Council consisting of representatives from the Swedish Energy Agency, SGU (Geological Survey of Sweden), and the Swedish Environmental Protection Agency. Other stakeholders may also be represented in



the future. The council meets at least twice a year and plays an advisory role in the strategic work based on the program's direction. It contributes with external monitoring from various perspectives and serves as a forum for regular dialogue on the follow-up of the program's results, impacts, and development.

The program team collaborates with representatives from industry, academia, and the public sector. An important role in this work will be played by the Battery Arena's Advisory Board, where the program's strategic direction will be reviewed annually.

Expert Evaluator Pool

The program aims to maintain an expert pool with both international and national reviewers, engaging relevant experts who are willing and able to contribute when needed. The composition of reviewers for each call is determined by the applications received. These experts have a strong understanding of battery research needs from a holistic perspective and are familiar with the agency's evaluation criteria.

Administration

The agency's administrative team prepares strategic materials related to external analysis, knowledge bases and syntheses, results communication, and international collaboration, and carries out the program's ongoing work. The team is responsible for the research funding process, securing resources and competencies among reviewers, and conducting reviewer training when necessary.

Gender Equality

The agency's gender equality goals are taken into account when appointing members to the program council and the reviewer pool. Gender equality is also actively promoted in the design of support measures.

Communication and Dissemination of Results

Communication efforts aim to continuously ensure and support the long-term supply of expertise in the battery field. These efforts are based on the program's strategic work with external analysis, syntheses, knowledge bases, dissemination of results, and international collaboration. The focus of the communication activities is partly shaped by the content of the program.

Battery Arena as a Communication Channel

The program's strategic direction is reviewed annually with the Battery Arena's Advisory Board. The program collaborates with Battery Arena in several ways to support development in selected areas. Relevant knowledge and result syntheses



and other communication materials produced within the program are continuously made available to battery stakeholders through the arena.

Additionally, information sessions about open calls, outcomes of calls, and reflections may be arranged for both Battery Arena participants and the broader battery community.

Other Communication Channels

In addition to Battery Arena, the program also utilizes other communication channels:

- An updated website on the Swedish Energy Agency's external platform.
- This site serves as a central hub for knowledge on battery research, including news about calls for proposals, approved and ongoing projects, research results, knowledge syntheses, and other communication materials.
- *Program conferences* as meeting places for result dissemination and collaboration.
- Dissemination of results to the battery ecosystem also occurs through communication channels linked to other agency programs, such as FFI and Future Electricity Systems.
- Through the assignment to publish *OMEV's newsletter*, the Swedish Energy Agency ensures basic external monitoring of areas relevant to battery research within the program's scope, as well as connections to the EU's research agenda. The target audience includes researchers within the program and others interested in battery research.

The program works to compile and make accessible knowledge from ongoing research projects, scientific achievements from progress reports, and other knowledge bases. Milestones within the program are highlighted as news, and coordination will take place with the communication efforts of companies and universities.

Working Methods and Program-Specific Guidelines

The program is designed to enable strategic governance of the agency's research efforts in the battery field, both in the long term and on an ongoing basis. Its structure also aims to create synergies with other activities and assignments. Mapping and analysis of the impacts achieved by the program's projects play a prominent role in the ongoing program work. This requires a knowledge-driven approach based on effective collaboration with related initiatives, support functions, and key stakeholders within the broader battery research ecosystem.



The development of the working method is carried out in cooperation with related and similar initiatives.

Ongoing Strategic Work

The program's direction is guided by the agency's strategic work in the battery field. This is achieved through both continuous collaboration and flexible resource allocation within the administrative team. The strategic work focuses on:

- Continuous external analysis
- Development of knowledge bases and syntheses
- Communication of results
- International collaboration

A key component of strategic governance is the recurring review of success factors and external analysis, which forms part of the basis for future calls for proposals. Traditional calls are combined with other tools, such as commissioned research, depending on identified needs. The program is also aligned in relevant forums through mutual exchange with stakeholders on research issues and results, ensuring that the direction and strategy are well-anchored and relevant for the state, industry, and academia.

Program's Desired Criteria

The program seeks projects that contribute to:

- Increasing the number of PhD students and postdoctoral researchers within the battery ecosystem.
- Raising the total number of active researchers in industry.
- Providing career development opportunities for researchers who have not yet attained stable senior positions in academia.
- Enhancing international researcher exchange, especially focusing on researchers who have not yet secured stable academic positions.
- Creating new collaborations between researchers not yet established in the battery value chain, to enable knowledge and competence transfer from adjacent research fields.
- Fostering new collaborations between companies operating in the field.
- promote collaboration at the Nordic, European, and global levels to address competition, and meet competence and knowledge needs.
- Increase researcher exchange.
- Promote gender equality in leadership positions within academia and industry.



Projects must describe in their application how they contribute to the program's desired criteria.

Collaboration is important, and research projects that involve connections between industry, academia, and society are encouraged to facilitate the dissemination and further use of research results. This can be achieved, for example, through:

- Projects in collaboration between actors in different parts of the battery value chain and/or across different industries, both in Sweden and internationally.
- Projects where individuals temporarily work in academia instead of industry, or vice versa.
- Collaborative activities such as seminars where project results are presented in a broader context, or where companies are given the opportunity to evaluate developed battery concepts to support industry competence development.
- Activities for communicating knowledge bases for policy development and policy recommendations to decision-makers in relevant forums.
- Reference groups.

Gender equality and diversity must be considered in the composition of the project team, in the selection of the project leader, and in the project's implementation, content, and intended goals and impacts.

Evaluation Criteria

The evaluation criteria for assessing projects are based on the program's desired criteria and outcome goals, specific call-related criteria, and other relevant aspects such as feasibility from various perspectives.

Projects that address specifically requested areas will be prioritized in cases where other evaluation factors are equal.

Monitoring and Evaluation

In its initial phase, the program aims to develop key performance indicators (KPIs) and metrics to monitor the program's results. The intention is to continuously track outcome goals to enable effective planning of future initiatives.

The program team maps and analyzes the outcomes of calls and the development of the research portfolio, both in connection with the evaluation of submitted applications and as needed for other purposes.



Internal reviews are to be conducted every two years, and external evaluations every four years. A more comprehensive external evaluation is therefore scheduled for spring 2027, to provide supporting material for decisions regarding the direction and scope of a potential continuation of the program. Monitoring and evaluation of program activities are also expected to take place within the framework of the agency's broader work on strategic prioritization and the assessment of the relevance and benefits of research and innovation activities.