

 PROCUREMENT RADAR · FREE SAMPLE

Radar #1 — Nordic Edition

AI and space in public procurement across Finland, Norway,
Sweden and Denmark, set against the rest of Europe.

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HOW TO READ THIS SAMPLE

Data window: notices published 1 Jan 2025 – 12 Oct 2026 (TED, Hilma, Doffin; Swedish annual statistics for 2025). Nordic = Finland, Norway, Sweden, Denmark (Iceland separately). Values in EUR; NOK/SEK/DKK converted at ECB euro reference rates ("converted"). Titles in [brackets] are our translations.

"Core" notices and the EU+EEA column are defined under the Key numbers table.

1 Executive summary

The Nordics buy more AI and space per head than the European average, buy earlier (more market dialogues and RFIs), and buy generative AI by name: in 2026 several Norwegian and Finnish agencies went to market for a named frontier model (Anthropic Claude) instead of a generic "AI solution". Most of this activity is not visible on TED: in Finland and Norway the majority of relevant notices exist only in the national portals.

7.8% Nordic share of core AI/space notices on TED (6.1% of EU+EEA population)	9.8 Finland, core notices per million inhabitants on TED (rank 5 of 31; EU+EEA 3.9)	55 → 144 Finnish core notices, TED only vs with national-only notices	32% GenAI/LLM share of Nordic core AI notices on TED (rest of Europe 17%)
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- 01 **Over-indexing.** Nordic buyers account for 7.8% of all core AI/space notices on TED, against 6.1% of the EU+EEA population. Finland publishes 9.8 core notices per million inhabitants on TED (rank 5 of 31), Norway 5.5, Denmark 5.2, Sweden 2.1; EU+EEA average 3.9.
- 02 **TED misses most Nordic activity.** Adding national-only notices (deduplicated against TED) lifts Finland from 55 to 144 core notices and Norway from 31 to 71. 89 Hilma and 40 Doffin core notices are not on TED.
- 03 **Generative AI is a bigger share of the Nordic AI pipeline.** Like-for-like on TED, 32% of Nordic core AI notices are GenAI/LLM/chatbot procurements versus 17% in the rest of Europe. Named-model buying (Claude, Claude Code) appears at Norsk Helsenett, Sikt and Yle.
- 04 **Earlier in the cycle.** Like-for-like on TED, 18% of Nordic AI notices are planning-stage (prior information, market dialogue, RFI) versus 5% elsewhere in Europe (Jan 2025–Sep 2026, Nordic incl. Iceland, n=210 vs 1,121); 28% including the Finnish and Norwegian national portals — a window to shape requirements before tenders are written.
- 05 **Space = Earth observation and defence satcom.** Earth observation/geodata is 61% of Nordic core space notices (rest of Europe 39%). The largest Nordic award in the data is the Danish Defence HBLL SATCOM framework, won by Marlink: €48.64M, converted from DKK 363.0M.
- 06 **Growth.** Core AI notices Jan–Sep 2026 vs Jan–Sep 2025: Nordic 74 → 93 (+26%), EU+EEA on TED 415 → 559 (+35%). Space is flat: Nordic 31 → 31, EU 259 → 245 (–5%).

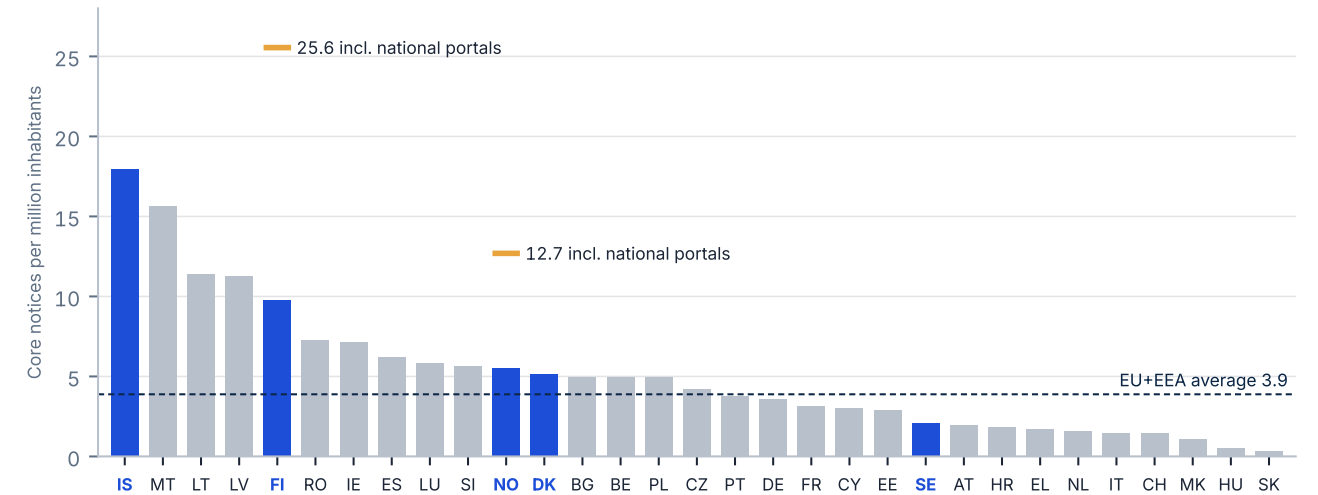
2 Key numbers

METRIC	EU+EEA	NORDIC
Core AI/space notices, all sources, deduplicated	1,908	268
... of which AI / space	1,304 / 609	198 / 70
Core notices on TED	1,779	139
GenAI/LLM share of core AI (TED)	18%	32%
Planning-stage share of AI notices on TED (EU+EEA column: elsewhere in Europe; Nordic incl. Hilma and Doffin in brackets)	5%	18% (28%)
Median estimated value, core competitions (where stated)	€555k	€900k
Core AI notices Jan–Sep 2025 → 2026	415 → 559 (+35%)	74 → 93 (+26%)
Open core opportunities (deadline after 12 Oct 2026)	52	11

“Core” = AI term in the procedure title (or a named AI product), or a space term/space CPV in the title. Description-only mentions, minor AI lots inside big IT frameworks and GNSS user equipment are kept in the dataset but excluded from headline numbers. EU+EEA column = all buyers publishing on TED, incl. the Nordics.

3 Key findings

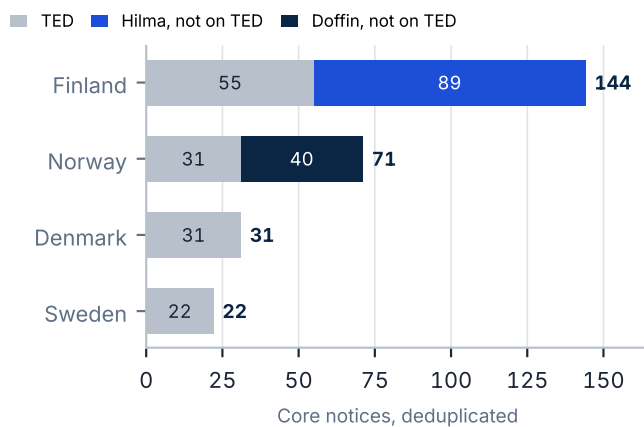
EXHIBIT 1
Core AI/space notices on TED per million inhabitants



Core AI/space notices on TED per million inhabitants; orange tick = including national-only notices (Hilma, Doffin). Nordic countries in blue.
Sources: TED © EU; Hilma (Hansel Oy); Doffin (DFØ). Core relevance only. Population: Eurostat tps00001 (1 Jan 2025).

EXHIBIT 2

Nordic core notices by country and source



Nordic core notices by country and source, after cross-source deduplication.
Sweden and Denmark: TED only in this issue.

What stands out

- 01 Named-model procurement.** Norsk Helsenett's intention notice for the AI tool Claude (awarded to Anthropic, July 2026); Sikt's intention notices for Claude and Claude Code; Yle's RFI for resellers of Claude licences (open to 14 Oct 2026).
- 02 Shared national platforms.** Norway is building common GenAI services: Digdir RFI on a common generative-AI solution for the public sector, DFØ joint generative-AI assistant, KS market dialogue on a joint national AI initiative for municipalities.

EXHIBIT 3

Largest Nordic core awards (result notices, value as published)

BUYER (COUNTRY)	WHAT	AWARD	WINNER(S)
Danish Defence acquisition agency (DK)	High Bandwidth Low Latency SATCOM framework	€48.64M*	Marlink
Klima- og miljødepartementet (NO)	High-resolution satellite images, NICFI programme	€17.08M*	not stated
European Environment Agency (DK)	Copernicus Land Monitoring, Priority Area Monitoring	€10.85M	CLS; Cotesa; GAF; Geoville
Norges Bank (NO)	AI specialised consultancy services (framework)	€7.64M*	Crayon; Deloitte; Experis; PwC; Sopra Steria; Tietoevry
Kanta - Hämeen hyvinvointialue (FI)	AI assistants for social and health care [our translation]	€4.95M	Avaintec

* converted at the ECB reference rate; framework values are ceilings, not spend.

- 03 Nordic suppliers win abroad.** ICEYE (FI) won €51.0M of Portugal's CEIIA very-high-resolution satellite tender (lots 1 and 4); MET Norway won ECMWF's Destination Earth regional AI-modelling capability (€7.93M).
- 04 Open now.** 52 core notices across Europe had a future response deadline on 12 Oct 2026, 11 of them Nordic — from Istekki's €45M AI and automation DPS (open to 2033) to Leibniz Universität Hannover's €74.95M LLM-training compute tender.

METHOD AND ACCURACY

TED Search API (EU-wide), Hilma (Finland) and Doffin (Norway) APIs, Swedish procurement statistics; AI and space queries in 23 languages plus space CPV codes; cross-source deduplication; values to EUR at ECB rates. A fresh out-of-sample check of 60 hand-labelled notices gave 82% strict / 94% lenient precision for core notices (95% Wilson intervals 66–91% / 80–98%). Every listed notice links to its official source in the full issue.

Get the full issue

The full issue (10 pages) adds the Nordic-vs-EU country table, 8 charts, all 11 open Nordic opportunities with deadlines and links, the sovereign-AI/LLM trend, defence-space signals and the full methodology.

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