

# Co-operation Programme for Fisheries, Aquaculture, Agriculture, Food and Forestry 2025–2030

From Land and Sea to Table: Together for a Sustainable and Competitive Nordic Region



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#### **Foreword**



Peter Kullgren, Swedish Minister for Rural Affairs and Karen Ellemann, Secretary General of the Nordic Council of Ministers.

The sectors covered by the Council of Ministers for Fisheries, Aquaculture, Agriculture, Food and Forestry (MR-FLJS) are all sectors of considerable importance to the Nordic countries and to Nordic co-operation. Our Vision 2030 is based upon the priorities that have been established for Nordic co-operation. This means that we work in the interests of a green, competitive and socially sustainable Nordic Region.

The green transition to sustainable use of resources is central to how we produce food and manage our natural assets in the Nordic Region, not least with future generations in mind. Economic sustainability, meanwhile, shows the importance of competitiveness that yields concrete future prospects for our sectors. This is a prerequisite for continued productivity development and food security for our citizens. Social sustainability is integrated into all parts of the food chains – from the right to secure, safe and nutritious food, to the educational programmes and career options we want to offer those who apply to the various sectors of FJLS.

Several crises pose a challenge to our societies, from extreme weather and other consequences of climate change to the threat of war in our wider region or the onset of future pandemics. As we work to shore up our preparedness and build resilience in the Nordic Region, we can clearly see the central importance of the FJLS sectors. As part of this co-operation programme, we specify the focus areas that can help bring about greater sustainability and robustness over the coming years, both in times of peace and times of crisis. We are stronger together than we are apart, and we look forward to jointly pursuing the goals and sub-goals that we set out in this co-operation programme for MR-FJLS 2025–2030.

Peter Kullgren

Swedish Minister for Rural Affairs

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Karen Ellemann

Secretary General of the Nordic Council of Ministers

#### Introduction

The co-operation programme for MR-FJLS describes the political priorities and objectives for 2025–2030.

Nordic co-operation within this area covers the following sectors: fisheries and aquaculture, agriculture, food and forestry, as well as reindeer herding. This is often summarised as the Nordic bioeconomy – a term which includes both the economy and societal development based on biological resources. The bioeconomy is of considerable importance to all the Nordic countries and it plays a crucial role when it comes to rural areas and to the creation of prosperity and of healthy and resilient societies with competitive companies.

The sectors which fall under the MR-FJLS have been put under pressure by global events such as climate change, the COVID pandemic, supply-chain disruptions and, most recently, geo-political challenges resulting from the Russian invasion of Ukraine, among other things. The Nordic countries need to co-operate in order to find future solutions for the green transition of agriculture, forestry, fishing, aquaculture and the food sectors, and for the implementation of the Paris Agreement and the Kunming-Montreal Global Biodiversity Framework. They also need jointly to find their way towards a balanced co-existence between our use of resources, the preservation of nature and other interests both on land and at sea. There is a need for regional co-operation that involves both the world of research and industry. Three goals in particular will set the course for Nordic co-operation in the 2025–2030 period: 1) Further the green transition, 2) Boost competitiveness and 3) Bolster our resilience.

The Nordic Council, civil society and other relevant actors have been involved in the drafting of the co-operation programme. The Nordic Council and Nordic Civ (a network of Nordic civil-society organisations) participated in September 2023 by providing input on the political priorities for 2025–2030. This input was utilised in the process of preparing the first draft, and it was shared with all actors within the MR-FJLS. An additional consultation was then held in October 2023 with representatives for the private sector and civil society who were nominated by the Member States as relevant actors in the FJLS policy area.

The co-operation programme is the governing document for all activity under the MR-FJLS. The co-operation programme was approved by the MR-FJLS on 19 June 2024 and applies until 31 December 2030.

The co-operation programme takes its starting point from the Nordic Council of Minister's mission to contribute towards attaining the vision to make the Nordic Region the world's most sustainable and integrated region by 2030. All of the councils work to achieve this vision through the three strategic priorities that have been established.

### Our Vision 2030



#### A competitive Nordic Region

Together, we will promote green growth in the Nordic Region based on knowledge, innovation, mobility, and digital integration.



#### A green Nordic Region

Together, we will promote a green transition of our societies and work towards carbon neutrality and a sustainable, circular, and bio-based economy.

The Nordic
Region will become
the most
sustainable and
integrated
region in the
world



#### A socially sustainable

#### Nordic Region

Together, we will promote an inclusive, equal, and interconnected region with shared values and strengthened cultural exchanges and welfare.

All activities in the Nordic Council of Ministers will contribute to fulfilling our vision that the Nordic Region will be the world's most sustainable and integrated region in 2030. The co-operation programme describes how the sector will work with the three strategic priority areas.

#### **Political Priorities**

#### The FJLS policy area – a brief overview

Efforts to ensure sustainable food systems and to secure the supply of nutritious food are of central importance to all of the Nordic countries. Most of the agricultural land in the Nordic Region is used to cultivate grass for animal feed, grains and other crops. The Nordic countries have been collaborating in relation to genetic resources within agriculture and forestry for decades already, and they have opted for a common strategy for the management of Nordic genetic resources in the form of NordGen (the Nordic Genetic Resource Center). Reindeer herding is a practice in Finland, Norway and Sweden, and this activity also crosses borders in some places between Sweden and Norway. Dairy and meat production are important activities in all countries, with Denmark occupying a special position in relation to pork production. Fishing and aquaculture are practices of considerable importance for Norway, Denmark, Iceland, the Faroe Islands and for Greenland, while Finland and Sweden are the largest producers of timber and other forest products from Nordic forestry. The sectors that make up the FJLS policy area have undergone – and are still undergoing – continuous adjustments and optimisation processes, not least in order to ensure continued financial profitability under changing circumstances.

## Possibilities and solutions to challenges for the FJLS policy area 2025–2030

The primary priorities for the FJLS policy area over the coming years are as follows: to promote a continued green transition towards sustainable food systems that entail the healthy, sustainable and resilient supply of food for a growing Nordic population, a health-promoting, secure and sustainable diet, robust breeds/species and breeding stock, good animal welfare and good animal and plant health. A fundamental prerequisite in making this possible is to boost competitiveness within FJLS production sectors through knowledge-based and sustainable management practices, sustainable use of resources and the production and further processing of renewable raw materials. It is necessary to bolster both national and regional resilience within the FJLS sectors in order thereby to contribute to greater food security.

Nordic co-operation is necessary in order to find solutions and make the necessary trade-offs to fulfil these prioritised goals. Food safety in the Nordic Region is generally

good, but extreme weather, supply-chain vulnerabilities, pollution and the spread of foreign and potentially harmful species are all examples of potential future challenges. Increasing the competitiveness of the bio-based industries will be crucial if we are to bolster food security; however, this also faces challenges from our commitments to reduce emissions, protect biodiversity and achieve greater levels of sustainability in how we manage our natural resources. The green transition can also pose a challenge to production goals within agriculture, forestry, fisheries, aquaculture and reindeer herding. For example, issues relating to spatial management can arise as it becomes increasingly necessary to use areas on land and at sea for an ever growing number of purposes. This leads to greater competition for spatial use on both land and sea.

New ideas, innovations and resources for projects that could have greater impact can contribute to solutions that promote competitive production and other societal benefits, without compromising on environmental and climate goals. Many of the solutions transcend both sectoral and national boundaries, and this means that our plan for engagement is affected by disparate agendas and objectives. It is therefore of considerable importance that we retain political consensus around our efforts to achieve the global goals – especially as major challenges remain for meeting these goals by 2030.

The Joint Statement by the Nordic Prime Ministers on a Sustainable Ocean Economy and the Green Transition demonstrates the impact that political consensus can lend to Nordic co-operation. The goals of this statement span common research efforts, enhanced knowledge exchange and greater Nordic participation within international initiatives and collaboration processes for sustainable ocean management. These goals have been given concrete shape via a number of initiatives within the ocean policy area and they will also serve as guidelines for the MR-FJLS co-operation programme 2025–2030.

It is clear that the needs within the FJLS policy area are both multiple and far in excess of the resources currently available for national and joint Nordic sectoral initiatives. Regional co-operation is therefore sensible in that it makes it possible to maximise the benefit of national efforts within a broader Nordic perspective, and to lay a better groundwork for synergies and exchange on a regional level. Greater co-operation between authorities and experts in the Nordic countries promotes the sharing of experiences, innovation and common research initiatives to the greater benefit of the entire Nordic Region. Collaboration between different Councils of Ministers and Nordic institutions also enables common initiatives across policy areas, with a good foothold in Nordic research and innovation activity. Established network and collaboration structures within FJLS can also be drawn on to aid efforts which build preparedness and capacity ahead of the challenges faced by this policy area. Nordic co-operation also offers good opportunities for the Nordic countries to speak with a single voice within international contexts where it is advantageous to highlight common Nordic perspectives on global issues.

Finally, one last dimension that presents both challenges and opportunities for the FJLS policy area is the advance of digitalisation, alongside continued developments within the field of artificial intelligence (AI). This is something that will be analysed more closely within the framework for Nordic co-operation, with an ambition to

achieve more efficient food analysis and testing processes, greater levels of consumer information and better information sharing practices that can help boost our common preparedness for zoonoses and epizootic diseases in the Nordic bioeconomy chains, as well as the registration and mapping of the diverse interests that exist across fishing, aquaculture, forestry and agriculture. The challenges that could be posed by digitalisation can be jointly analysed by government authorities in the Nordic countries in order to create a basis for joint Nordic initiatives that improve our preparedness in relation to cyber security and other digital threats which are common to the entire policy area. Greater levels of digitalisation are also important for production optimisation within the green and blue sectors, allowing for lower degrees of resource loss, reduced use of pesticides and antibiotics, for example, and higher levels of skills development and enhanced knowledge.

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The green transition to the sustainable use of resources is central to how we shall produce food and manage our natural assets in the Nordic Region, not least with future generations in mind.

#### The green transition

It is becoming increasingly complex to manage and use natural resources sustainably, and there is therefore a need to expand our knowledge in this area, so that we can better adapt to climate change, limit impact on the climate and environment, secure competitive production for a growing Nordic population, and also promote welfare and biodiversity. The need for more joint initiatives within research, innovation and skills development is therefore considerable, and there is good potential here to generate Nordic added value. Sustainable food systems and value chains within the FJLS policy area require competitive production, access to renewable energy resources and the sustainable safeguarding of biodiversity. Simultaneously, it is also important that food safety be retained at the same high level as previously, with more solutions and innovations in place to promote sustainable and healthy consumption. Achieving sustainable and healthy consumption requires solutions and innovations that build suitable raw-material and processing chains for the future, allowing for greater resilience and competitiveness, while also curtailing the risks of negative climate and environmental impacts from these systems.

Sustainable food production is reliant on the continuation of good animal, fish and plant health in the Nordic Region, as these in turn allow for good animal welfare, a low degree of medication and pesticide use, and safer food. These areas must also be seen

as interlinked with the areas of environment and health through what is known as a 'One-Health' perspective. Sustainable and healthy food consumption also requires food safety and the availability of nutritious food in accordance with the research findings that have been compiled within the Nordic Nutrition Recommendations, and it must be based on the foods for which we have good natural and cultural conditions to produce here in the Nordic Region. We also need to reduce food waste, improve the efficiency of our resource usage from farm and sea to table and build better food environments. The production of new green and marine proteins and side streams in the bioeconomy represents opportunities for increased local production of feed and food, but it also places new demands on good food safety and analytical capacity an area for which Nordic co-operation already has an established structure and long experience of common initiatives. Sustainable and healthy food consumption will also require a greater focus on biological and genetic diversity, resources and genetic expertise. Through NordGen, the Nordic countries have a unique opportunity to support sustainable consumption and production through the development of healthy and more resilient crops that can withstand a changing climate, for example. NordGen also allows for the preservation and stimulation of the use of other, less commercially farmed livestock breeds with varying attributes which are sustainable in the long term and in demand because they can assure future access to suitable breeding stock.

The green transition requires us to reduce our use of fossil resources, and this in turn means a greater need for alternative and renewable energy resources such as bioenergy, wind power and solar power. Construction and civil-engineering solutions based on steel, aluminium and concrete require considerable use of fossil energy. This means that the Nordic bio-industries – forestry above all, but also waste from food production – must be incorporated into the energy supply chain in new ways, and that buildings and structures should use green, timber-based products to a greater extent than before. There is a good tradition of research collaboration and knowledge sharing between the Nordic countries within the area of forestry and wood processing.



The Nordic countries need to co-operate in order to find future solutions for the green transition of agriculture, forestry, fishing, aquaculture and the food sectors, and for the implementation of the Paris Agreement and the Kunming-Montreal Global Biodiversity Framework.

#### **Greater competitiveness**

The green transition should be viewed as an opportunity for the FJLS policy area to contribute towards economic value generation through the production of products and services from the FJLS sectors which promote the climate transition and also enhance biodiversity. Greater competitiveness and profitable production within the value chains of forestry, agriculture, fishing and aquaculture generate important economic preconditions for bolstering this transition. As New Nordic Food has demonstrated, Nordic efforts within food culture and gastronomy can also lead to greater interest in and knowledge of Nordic food culture while also boosting value generation and competitiveness in the Nordic countries.

Innovative solutions which put economic, social and environmental sustainability in focus should be sought in close collaboration with actors from the business community, public authorities, civil society and research to boost the competitiveness of the value chains in forestry, agriculture, fishing and aquaculture. Equipping FJLS value chains to meet future needs for products and services can contribute to the development of new value generation. At the same time, sustainability criteria also impose new compliance and reporting requirements on businesses. Access to relevant and high-quality statistics and data can represent one way to boost competitiveness within both national and international markets.

Shortages of workers with the right qualifications and a dearth of new start-ups within the FJLS sectors pose a challenge to agricultural production, fisheries and aquaculture, as well as to other parts of the food chain. The dependence of these sectors on foreign labour may over time entail a risk of both vulnerability and knowledge loss. There is already an acute shortage of practising veterinarians in a majority of the Nordic countries, and this is expected to remain a challenge in both the medium and long term, posing difficulties to animal husbandry and welfare. The development of career opportunities, the improvement of status and income opportunities, the countering of any border obstacles and the promotion of the role played by young people in our food systems are all joint political priorities that will help boost competitiveness and social sustainability within the FJLS sectors in the Nordic Region.



Sustainable food systems and value chains within the FJLS policy area require competitive production, access to renewable energy resources and the sustainable safeguarding of biodiversity.

#### Greater resilience

The warfare and greater geopolitical uncertainty of the last few years, in addition to extreme weather and the anticipated consequences of climate change and changing conditions in our eco-systems, as well as the effects of the COVID-19 pandemic on society, all show how both external and internal events, and crises that sometimes occur concurrently, can affect the Nordic Region. It is considered that the continued development of the bioeconomy-can reduce vulnerabilities and boost supply capacities through an enhanced Nordic capacity to produce bio-based goods as a part of our preparedness efforts.

In the wake of climate change, we are left with a need for greater and shared knowledge on how the bioeconomy is affected. Extreme weather, the loss of biodiversity and pollution all pose a continued threat to production resources both globally and in the Nordic Region, with consequences that are both costly and often unpredictable. The war in Ukraine, and the high energy and chemical fertiliser costs to which it has given rise, as well as the impact of COVID-19 on production conditions, societal structures and public health, further demonstrate the importance of bolstering preparedness in the region. Building social, economic and environmental resilience against on-going and future crises – i.e. future-proofing production resources and food supply to deal with what are often referred to as polycrises – will be a component of our preparedness work on a national level, and an area in which regional collaboration can contribute to our efforts. The weaknesses revealed by the pandemic at a time of adversity can also be drawn upon as valuable lessons in this work.

Nordic co-operation can bolster national preparedness processes through the exchange of experiences, networks, common initiatives and plans. As climate change, the loss of biodiversity and other crises also affect our neighbouring region, knowledge and preparedness matters relating to supply and climate change adaptation within the FJLS sectors need to be shared with our neighbours as well. Nordic co-operation on an international level in relation to global processes and initiatives can further help boost the region's preparedness and resilience against on-going and future crises.

#### **Overarching perspectives**

The political priorities for the work of the MR-FJLS aim to bolster the Nordic Region's Vision 2030 and the three strategic priorities of a Green Nordic Region, a Competitive Nordic Region and a Socially Sustainable Nordic Region. Interdisciplinary perspectives on children and young people, equality and sustainable development will also be adopted actively within the work carried out to attain all goals and sub-goals. These will also be further developed in the work plans of the MR-FJLS for the 2025–2027 and 2028–2030 periods.

The Nordic Council of Ministers for Fisheries, Aquaculture, Agriculture, Food and Forestry has adopted decisions on goals and sub-goals for the work to be undertaken in the 2025–2030 period. The political priorities govern all activity within the policy area of Nordic co-operation. This means that initiatives are to be developed on the basis of these goals, and that their activities, outcomes and effects must bring about the desired change.

## Goal 1: A Strengthened Green Transition within the FJLS Sectors



This goal primarily responds to the strategic priority of a Green Nordic Region by boosting knowledge on how the green transition can be attained within the FJLS sectors. The goal also contributes to the strategic priority of a Competitive Nordic Region as the efficient and sustainable use of resources and energy is expected to boost competitiveness within primary production and processing value chains. Finally, it is also the case that healthy and more sustainable food consumption also contributes to the strategic priority of a Socially Sustainable Nordic Region by promoting healthy lifestyles and better public health.

Sub-goal 1.1:
Sustainable
management of
natural resources

Support for Nordic co-operation and further dialogue between Nordic actors for sustainable solutions within the FJLS sectors that build up a balanced co-existence between our resource usage, the preservation of nature and other interests both on land and at sea. Greater and more developed knowledge on the sustainable and integrated management and sustainable use of genetic resources, landbased and marine resources and biodiversity in the Nordic Region. The further development of genetically diverse crops, plants, livestock animals and fish production which are adapted to climate changes and able to contribute to a sustainable food production system.

Sub-goal 1.2:
Climate adaptation and reduced environmental and climate impact within the FJLS sectors

Support for policy development in order to adapt the bioeconomy to climate changes and limit impact on the environment and climate, and to promote a resource-effective, circular economy throughout the entire bio-based value chain. Co-operation around common Nordic challenges linked to climate adaptation, conflicts within land use and marine spatial management, the loss of biodiversity and pollution.

Sub-goal 1.3: Sustainable and efficient energy use within food systems

Support for initiatives that enable sustainable and efficient energy use – including through by-products and residues from the use of biomass – within Nordic food systems. Promote and further advance the exchange of experiences in order to enable the identification of synergies and circular solutions between production sectors, and to contribute to solutions for co-existence, network-building and common strategies for innovative energy solutions.

Sub-goal 1.4: Healthy and sustainable food consumption in the Nordic Region

Support for common Nordic initiatives for healthy food consumption and food environments which can promote healthy and sustainable diets and reduced levels of food waste throughout the entire value chain. Co-operation for high-quality consumer information which includes the knowledge base from the Nordic Nutrition Recommendations, front-of-pack labelling and other forms of food labelling. Initiatives to maintain food safety through risk analyses and to ensure that cost-effective and knowledge-based analytical methods are available – for example, when raw materials with a higher percentage of green proteins and by-products are introduced into both feed and food products.

## Goal 2: Greater Competitiveness through Sustainable Management and Use of Resources



This goal contributes to all three of the strategic priorities. It contributes to a Green Nordic Region by placing focus on sustainable business practices and circular solutions in line with the green transition. It contributes to a Competitive Nordic Region via initiatives that aim to boost profitability and competitiveness for the FJLS sectors in the Nordic Region. Finally, it contributes to a Socially Sustainable Nordic Region in that it benefits the labour force and promotes better career opportunities in the FJLS sectors.

Sub-goal 2.1: Public-private partnerships for innovation and competitiveness

Support for the establishment of Nordic fora and meeting places for public authorities, academia, civil society and businesses that are active within the FJLS policy area. Reinforce co-operation around market and industry research for the FJLS sectors through the active use of institutions such as NordForsk and Nordic Innovation, with particular importance being placed on the leveraging of synergies between calls for proposals in the Nordic Region and in the EU. Collaborations are to be sought for innovation, knowledge building and pilot projects for sustainable, circular solutions and new, bio-based products from FJLS value chains which build competitiveness and economic added value.

Sub-goal 2.2:
Statistics and data
for sustainable
business
development within
the Nordic
bioeconomy

Support for the development of a Nordic statistics base for the provision of relevant information for industry, public authorities and research sector within the FJLS policy area. Collaboration is to be sought with other Councils of Ministers that focuses on border obstacles, labour force, digitalisation, education, skills development and growth, for the development of high-quality statistics and cross-sectoral data that promotes economic value generation and bolsters sustainability and competitiveness.

Sub-goal 2.3:
Career
opportunities and
strengthened
labour force within
the FJLS sectors

Support for initiatives that work to counteract structural obstacles, contribute to greater equality and improve conditions for a younger and more diversified labour force. Such initiatives could also contribute towards regional development, greater career opportunities within FJLS, enhanced social sustainability, greater competitiveness and greater resilience within food supply systems. Co-operation is also to be promoted between training and skills development in the Nordic Region and between businesses and sites of education and training in order to boost the attractiveness of the FJLS sectors.

## Goal 3: Greater Resilience within the FJLS Sectors



The joint development of resilient systems and structures within the FJLS sectors is a highly pertinent task within the realm of Nordic co-operation, and it is expected that this will contribute positively to all three of the strategic priorities – a Green Nordic Region, a Competitive Nordic Region and a Socially Sustainable Nordic Region.

## Sub-goal 3.1: Nordic co-operation for greater resilience

The work to boost resilience and preparedness that has already been initiated by the MR-FJLS shall be followed up on by way of greater knowledge, dialogue and consensus around the role and added value of Nordic co-operation with a view to enhancing regional resilience further. Common initiatives and collaborations are to be initiated for a resilient Nordic bioeconomy that encompasses food, feed and drinking water supply, veterinary co-operation, the One-Health perspective, bio-energy, genetic resources and the restoration of eco-systems, as well as common strategies for critical input goods and labour force. Support is to be given for the creation of structures, networks and collaborations between different societal actors in order to allow for simplified communication, information sharing and skills development between the Nordic countries.

#### Sub-goal 3.2: Greater strategic collaboration in the neighbouring area

Support for initiatives within the Baltic Sea Region and with the Baltic countries, as well as within the Arctic region, in order to boost common resilience against crises in the wider region. Co-operation is to be strengthened with neighbouring countries in the west in order to address the consequences of climate change, as well as the changing geo-political reality and the crises that this provokes. Support for common initiatives with actors in the neighbouring area based on the analyses and priorities established for sub-goal 3.1 (see above).

Sub-goal 3.3: Greater international cooperation

Nordic input is to be strengthened within international cooperation around Agenda 2030 and the Sustainable
Development Goals (SDGs) that are of particular relevance to the FJLS policy area. International co-operation is to be enhanced for greater resilience against global challenges by building networks and cross-border capacity for preparedness, dialogue and exchange of experiences.

Support for common Nordic contributions towards global policy processes and within international fora.

## Evaluating the Co-operation Programme

The co-operation programme applies for the 2025–2030 period; however, this period is divided up into two, three-year work plans for 2025–2027 and 2028–2030 respectively.

An evaluation will be performed in the middle of the period, on the basis of which the Council of Ministers may choose to make adjustments to the programmes. This shall also give them an opportunity to receive feedback on how the work plan for the final period should be formulated.

In addition, there will also be an on-going evaluation at the discretion of the Secretary General and the Council of Ministers. This process will be undertaken separately within each sector led by the Secretariat and in consultation with the committee of senior officials for each respective sector.



#### **About this publication**

#### Nordic Co-operation Programme for Fisheries, Aquaculture, Agriculture, Food and Forestry 2025–2030

PoltikNord 2024:749 ISBN 978-92-893-7971-7 (PDF) ISBN 978-92-893-7972-4 (ONLINE) http://dx.doi.org/10.6027/politiknord2024-749

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Frontpage icon: Knud Andersen

Photo: Anna Hållams / Image Bank Sweden, Helena Wahlman / Image Bank Sweden, Melker Dakstrand / Image Bank Swden, Mads Schmidt Rasmussen / norden.org

Published: October 2024



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