The Swedish Market
Medtech

Open Trade Gate Sweden
National Board of Trade

The purpose of the market study

The purpose of this market study is to offer a comprehensive guide for companies that are interested in entering the Swedish market for medtech solutions and services. It aims to offer valuable insights and support actionable strategies that exporters of medical devices and services can use to establish a foothold in Sweden. The study provides an overview of the Swedish market in this sector, outlines important trends, details regulatory requirements, and offers guidance on how to identify and secure business partners.

This market study is intended for companies from low- and middle-income countries (LMICs) interested in entering the Swedish market for medical devices and services.

Where MEDTECH begins (and HEALTHTECH ends)

It is important to clarify what is meant by medtech in this report, and how it differs from healthtech.

Medtech (medical technology) typically refers to devices, equipment, and software used by healthcare professionals in clinical settings for the diagnosis, monitoring, or treatment of patients. Because of its direct impact on patient health, medtech is highly regulated, primarily under the EU Medical Device Regulation (MDR) and In Vitro Diagnostic Regulation (IVDR). Examples include surgical instruments, diagnostic imaging equipment, clinical decision support software (for example AI tools that analyse medical images to assist in diagnosis), digital pathology platforms, remote monitoring tools integrated with hospital systems (for example heart rate, oxygen saturation, or glucose monitors), EHR-integrated diagnostic algorithms (for example sepsis risk scoring tools), Software-as-a-Medical-Device (SaMD) that processes lab results or guides radiotherapy planning.

Healthtech (health technology), in contrast, is a broader category that includes digital tools and services designed to improve healthcare delivery, management, and outcomes, often outside clinical settings. Healthtech includes innovations such as telemedicine platforms, mobile health apps, mental health support, or chronic condition tracking, wearable fitness and wellness trackers, digital platforms for care coordination and appointment booking, AI-powered triage chatbots, and lifestyle management tools.

Many of these tools are used directly by patients or by providers in non-traditional settings, such as home care or virtual clinics, and may not fall under the strict regulatory frameworks governing medtech. However, it is important to note that some digital solutions do fall under the medtech category, depending on their intended medical use, particularly if they are designed to diagnose, monitor, or treat a medical condition.

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Key trends influencing Sweden’s medtech market

The Swedish medtech market is increasingly being shaped by the digital transformation, including telemedicine, remote diagnostics, AI-driven tools, and interoperable patient data platforms. This shift is driven by both innovation and the structural demands of Sweden’s highly decentralised healthcare system, which prioritises accessibility, efficiency, and patient-centred care.

> *There’s a general shift toward more digitally enabled, patient-centric models, and that’s influencing everything from procurement to product design. Companies that can't show how they contribute to efficiency or remote care simply won’t get far.*
> – Helena Holma, Leyr

Economic environment

In 2024, Sweden’s inflation dropped below the central bank’s 2.5 per cent target. However, regional healthcare systems still faced severe financial strain, reporting combined deficits of USD 3.18 billion (Swedish Association of Local Authorities and Regions, SKR). Contributing factors include rising healthcare costs, inflation-related expenses, pension obligations, and staffing shortages. A new agreement with the Swedish Association of Health Professionals (Vårdförbundet), which reduced weekly work hours, intensified financial pressure. In response, regions introduced cost-containment measures affecting procurement. These conditions also shape innovation, with buyers now favouring solutions that demonstrate clinical value, efficiency, and long-term savings. For medtech suppliers, this shift opens opportunities to meet regional needs with scalable, innovative, and budget-conscious technologies.

> *Hospitals want innovation, but the economic reality forces them to focus on the most pressing needs. Budgets are tight, and any solution that doesn’t immediately show cost-effectiveness will be deprioritised.* – Erik Stenberg, Innovation Skåne

Sustainability and green procurement

Environmental impact assessments are now standard in tenders for digital solutions. Requirements include energy efficiency, carbon footprint (including cloud hosting), and lifecycle management, especially for software tied to hardware. The Swedish Public Procurement Agency (Upphandlingsmyndigheten) and regions such as Stockholm and Västra Götaland apply sustainability filters for IT services, including reduced energy use, renewable-powered data centres, and carbon-neutral operations. Companies such as Cambio now publish sustainability impact reports aligned with Sweden’s fossil-free healthcare goals.

> *Sustainability is becoming a procurement criterion, not just a bonus. Regions are asking how solutions are hosted, what energy sources are used, and how long the hardware or system will last.* – Oscar He, Key2Compliance

To increase competitiveness, suppliers should highlight energy-efficient code, use renewable hosting, provide ESG data, modular design, and carbon footprint assessments where possible.

Geopolitical and regulatory pressures

Global tensions and evolving EU regulations are influencing how medtech solutions are sourced and approved. There is growing scrutiny of software origin and traceability, particularly for tools that process sensitive health data. Cybersecurity and data hosting within the EU's jurisdiction are prioritised. This mirrors the EU's broader push for digital sovereignty, where critical digital infrastructure, such as electronic health record (EHR) systems, remote monitoring platforms, and AI diagnostics, should ideally be hosted, developed, or maintained within the EU regulatory environment.

> *Digital sovereignty is starting to matter. If you can't demonstrate where your data is processed or show that your software meets EU requirements, it's becoming harder to get into Swedish healthcare.* – Helena Holma, Leyr

Exporters from low- and middle-income countries must meet high standards for reliability, documentation, security, and governance. Partnering with local integrators, or establishing a legal and technical presence in Sweden, could be essential for success.

Mergers, acquisitions, and investment trends

Swedish startups continue to attract strong investment, particularly in life sciences, precision medicine, and digital health. This momentum aligns with Europe's broader digital health boom, creating a favourable environment for mergers and acquisitions. The medtech sector is becoming more consolidated, especially around digital and AI-driven solutions.

> *We're seeing more consolidation, startups with a clear regulatory path and scalable tech are becoming acquisition targets. Integration with existing systems is key, especially for AI and digital diagnostics.* – Henrik Björeson, Suturion

This trend opens opportunities for exporters offering sustainable solutions, strong regulatory compliance, and trusted digital products to enter the Swedish market through collaboration or acquisition.

Gender diversity and inclusive innovation

Sweden emphasises gender equality and inclusive innovation. These values influence public funding decisions, procurement, and the design of digital health solutions. International suppliers highlighting diverse teams and equality-focused solutions may find a more receptive market and potential partners in both the public and the private sector.

> *If we want real innovation in healthcare, we need more diversity – not just in patient data, but in who's building the solutions. Right now, women's health is underfunded, and we see that reflected in what gets developed.* – Helena, Medviso

The Swedish medtech market

Sweden is a global leader in medtech innovation, particularly in digital health, artificial intelligence (AI), and telemedicine. Swedish companies are highly active in patent filing, particularly in digital communication and computing technologies linked to healthcare solutions.

The industry has seen strong growth, with an 18 per cent increase in employment since 2019. As of 2023, Sweden is home to over 2,100 medtech companies, most of which are micro-enterprises or sole proprietorships.[1] Collectively, medtech and life science companies in Sweden generated USD 46.8 billion in net turnover in 2022, a 54 per cent increase compared to 2014.[2]

Key regional clusters include Stockholm–Uppsala, Västra Götaland, and Skåne.

In 2023, Sweden's medtech sector generated USD 15.9 billion in revenue, with USD 3.7 billion in exports, primarily to markets outside the EU. Imports totalled USD 3.9 billion 40 per cent of which came from non-EU countries.[1]

Imports from low- and middle-income countries are growing rapidly, especially in innovation-driven segments. Diagnostic imaging equipment (ultrasound, MRI, X-ray technologies) accounted for over USD 30 million in imports from 2019 to 2023, growing at an average annual rate of over 300 per cent. Electro-diagnostic, functional monitoring, and medical data processing devices also show emerging activity.

While Sweden remains a net importer of medical instruments, the data signals strong demand for CE-marked products that offer digital capabilities. Around 60 per cent of imports come from EU countries, with growing opportunities for exporters from low- and middle-income countries.

What Sweden buys: A five-year view of medtech imports

Over the past five years, Sweden has consistently imported high-value, digitally integrated medical technologies. Diagnostic imaging equipment has led the way in volume and growth, followed by electro-diagnostic tools, remote monitoring devices, and medical data processing equipment. These categories reflect Sweden's interest in connected and intelligent technologies.

> *Sweden is forward-leaning when it comes to digital innovation in healthcare, but that doesn't mean we produce everything ourselves. There's real interest in bringing in smart solutions from abroad – especially if they solve a specific problem and are ready for integration.* – Hanna Sjöström, Neola Medical

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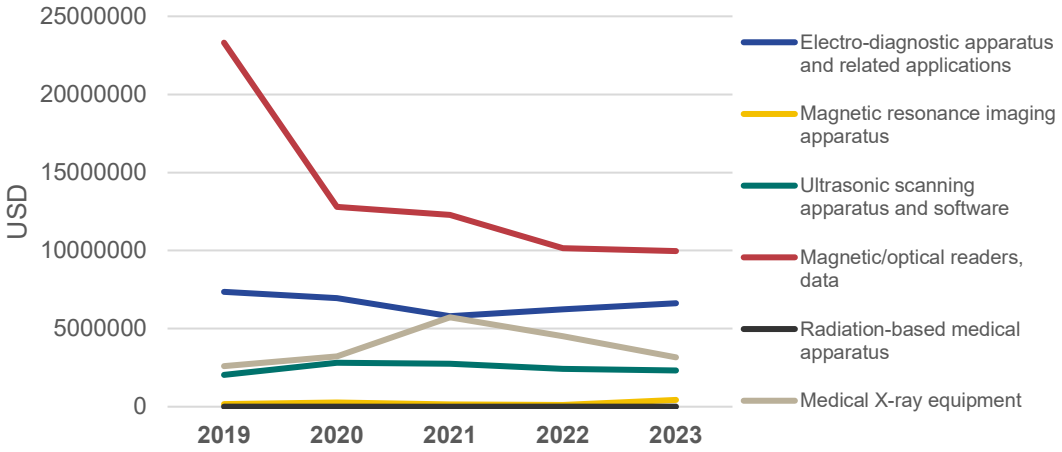
1 Swedish Medtech, 2024. Den svenska medicintekniska branschen i siffror 2024. Available at: https://www.swedishmedtech.se/upl/files/209226.pdf

2 Medicon Village, 2025. Fresh statistics on the Swedish life science sector. Available at: https://www.mediconvillage.se/fresh-statistics-on-the-swedish-life-science-sector

Between 2019 and 2023, Sweden primarily imported diagnostic imaging equipment, including ECG, X-ray, and MRI devices, from low- and middle-income countries.

Figure 1. Medtech import trends from low- and middle-income countries



Import data from TrendEconomy 2019–2023 filtered by HS Codes.

The most promising entry points are products that integrate with digital platforms (for example EHRs, remote care systems), meet EU regulatory requirements (MDR/IVDR), address efficiency and sustainability needs, and offer clear clinical or economic value.

> *There's an openness to new technologies in Sweden – especially if they help with efficiency or patient outcomes. But the key is that they must meet quality and compliance expectations*. – Henrik Björeson, Suturion

> *Digital diagnostics and connected devices are where we see most of the interest, both in procurement and among clinicians.* – Helen Franson, Medviso

The market landscape: Entry points and key players in Sweden

Understanding Sweden's healthcare system

Sweden's healthcare system is highly decentralised. The country is divided into 21 regions, each responsible for financing and providing healthcare services to its residents. Sweden's 290 municipalities handle long-term care and social care. The system is primarily tax-funded and publicly operated, with regions managing hospitals and specialist care. The private healthcare sector often operates under contract with the public system, particularly in primary care and elective services.

> *We have 21 regions… in the categories I've worked with, we have 15 or 16 tender processes – it's very decentralised.* – Henrik Björeson, Suturion

> *It may seem fragmented, but it offers several ways to get your foot in the door. Startups that know the local systems and workflows can find allies in the right clinics or innovation units.* – Erik Stenberg, Innovation Skåne

This decentralisation results in variations in procurement and reimbursement practices across the regions. For digital health exporters, this fragmentation can be challenging. However, it allows for regionally tailored strategies. Solutions that can demonstrate strong clinical evidence, proven quality, and cost-effectiveness tailored to regional needs stand a better chance of being accepted and reimbursed. To navigate this landscape successfully, it is crucial to select appropriate distribution channels and engage directly with regional healthcare authorities.

The market landscape

Sweden's digital health market is expanding rapidly, driven by strong public investment and a clear strategic focus on integrated care. In 2024, the market reached USD 4.4 billion in revenue and is projected to grow at a compound annual growth rate (CAGR) of 21.9 per cent, reaching USD 14.3 billion by 2030. The fastest-growing segment is tele-healthcare, including video consultations, remote patient monitoring, and digital therapeutics.[3]

Public sector investment plays a major role in shaping this landscape. Sweden's 21 regions collectively invest approximately USD 1.22 billion annually in healthcare IT. Key achievements include 99 per cent e-prescriptions, supported by robust national infrastructure.[4] Sweden's approach to digital health reflects a clear demand for solutions that are technically advanced and ready to integrate seamlessly into public healthcare systems.

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3 Grand View Research, 2024. Sweden Digital Health Market Size, Share & Trends Analysis Report. Available at: https://www.grandviewresearch.com/horizon/outlook/digital-health-market/sweden.

4 U.S. Commercial Service, 2023. Sweden - Digital Healthcare Services Market Overview. Available at: https://www.trade.gov/market-intelligence/sweden-digital-healthcare-services-market-overview.

> *We're not just looking for the next big thing. We're looking for digital tools that are stable, interoperable, and ready to be implemented across different care settings. If a solution solves a real problem and fits into existing systems, there's definitely interest.* – Erik Stenberg, Innovation Skåne

The private healthcare market in Sweden is steadily growing and closely integrated with the public system. In 2019, private providers delivered approximately 17 per cent of all healthcare services and at least 20 per cent of nursing home and home care services.[5]

Procurement in the private sector is generally more streamlined and less bureaucratic. While formal tenders may still be used by larger private hospital groups, many decisions are made through direct sales channels, partner networks, or pilot collaborations. Entering the market often depends on 'getting in through the right door', highlighting the importance of building trust-based relationships and strategic alliances.

> *A big challenge is just getting in. Not just into the tender process, but finding who the right person to talk to. A lot of decisions are made informally – through networks and trust. If you don't know the right door to knock on, it's easy to be left out.* – Helena Holma, Leyr

> *We need to understand the workflows and show that we're a serious player – not just a cool innovation. The people who open doors are the ones who believe in your product. That trust, that credibility – it's everything in this system.* – Helen Fransson, Medviso

Smaller companies are often encouraged to 'piggyback' on major players such as Siemens or Philips to gain access to the healthcare market. These multinationals can act as platform providers, systems integrators, and strategic procurement partners for hospitals and regions. By embedding their solutions within larger vendor ecosystems, startups can bypass lengthy procurement processes and leverage the trust, infrastructure, and integration support already established by these dominant players.

> *Startups with great products often get absorbed into bigger platforms. Hospitals sign with a major vendor – but behind the scenes, there might be five startups bundled into that deal…. Startups don't always enter the system directly – many rides in under the umbrella of bigger platforms.* – Erik Stenberg, Innovation Skåne

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5 Business Region Göteborg (2022) *The Healthcare Market in Sweden 2022*. Available at: https://www.investingothenburg.com/sites/investingothenburg/files/downloadable_files/the-healthcare-market-in-sweden-2022.pdf.

Market access through local integrators

Multinational companies are deeply embedded in the Swedish healthcare procurement landscape, not just as suppliers, but as platform providers that act as gatekeepers for smaller companies.

Largest private healthcare providers in Sweden: **Capio, Attendo, Aleris** and **Ambea**

System integrators and aggregator:

GE Health Care	Siemens Healthineers
Boston Scientific	Visiba Care
Philips Healthcare	Doctrin
Youmedico	S3 Connected Health
Min Doctor	Cambio Healthcare
Medtronic	Elekta
Cellink	Ray Search Laboratories
Sectra	Vitrolife
Abbott	Kry

Hybrid business models are emerging in the Swedish digital medtech space. Key players include:

- **Cambio Healthcare Systems**, a leading provider of EHR system, decision support tools, and patient flow solutions. The company frequently integrates third-party digital tools.
- **S3 Connected Health** specialises in end-to-end connected devices and digital therapeutic platforms.
- **Sectra AB**, a Swedish leader in medical imaging and secure IT systems, frequently bundles foreign-developed imaging software and analytics tools into integrated hospital solutions.

Several Nordic IT system integrators, such as Advania, Sigma, and CombinedX, support healthcare providers in deploying digital health platforms and telemedicine services.

Partnering with system integrators can help exporters navigate complex procurement processes, ensure compliance with regulations, and support technical integration and after-sales service. This allows exporters to address buyer concerns, making it easier for their solutions to be accepted in both public and private tenders.

Partnering with resellers: A market entry strategy

Intermediary procurement-specialist companies help suppliers access the market but can create risks for buyers in reliability, pricing, and compliance.

Procurement-specialists / Consulting firms

CKS Healthcare – Advisory services for hospital procurement and logistics.
Efficio Nordics – Cross-sector procurement consultancy.
Palliance AB – Pharmaceutical and medical supply distributor.
Inverto – Strategic procurement consultancy.

Opportunities on the Swedish market

Sweden's public investment in healthcare IT (USD 1.2 billion) supports ongoing EHR upgrades and remote care platforms, creating opportunities for digital solutions that integrate smoothly with existing systems.

> *We will soon roll out the new journal system in Skåne, Millennium… So, we want one electronic health record system and a modern system with an open API, where you are allowed to include third-party solutions. So, I mean, that's one step towards opening up.* – Erik Stenberg, Innovation Skåne

High-growth segments include tele-healthcare, digital therapeutics, and remote monitoring. Import data also shows rising demand for diagnostic imaging, electro-diagnostic tools, and AI-powered healthcare technologies.

> *Digital diagnostics and connected devices are where we see the most interest, both in procurement and among clinicians.* – Helena, Medviso

Instead of entering public tenders directly, many startups gain market access by partnering with major platform providers such as Siemens, Philips, GE HealthCare, or through local distributors or procurement specialists. These large vendors dominate the procurement ecosystem by embedding third-party services into their broader hospital IT offerings, allowing smaller companies to enter hospitals through integrated partnerships. While this route can lower barriers to entry and leverage existing buyer relationships, it may also reduce the smaller company's brand visibility and limit control over pricing and positioning.

> *Often companies form just to resell medical devices. They gather a large portfolio and specialise in procurements, but can't guarantee production capacity or control the supply chain…. Sometimes, the manufacturer raises prices during a contract. But the reseller can't do anything, because they're not the producer.* – Erik Rask, MedBeat

In addition, Swedish buyers are increasingly weighing sustainability and operational efficiency in their procurement decisions. Solutions that demonstrate low energy use, strong cybersecurity, and long-term value rather than high upfront costs are more likely to win tenders.

Live up to the requirements

To support the safe adoption of digital health solutions, Sweden has implemented the Nordic Digital Health & Medication Platform and the associated evaluation framework, NordDEC. Adopted by all the Nordic countries, NordDEC establishes a common set of criteria for assessing digital health technologies in both clinical and preventive care. This accreditation system allows for mutual recognition: a solution accredited in one country is considered approved in all five. By aligning with international best practices, NordDEC streamlines market access and provides a clear pathway for digital health companies to demonstrate regulatory compliance and build trust with healthcare providers.

MDR and IVDR regulations

Sweden applies the same regulatory framework for medical devices as other EU Member States. Once a product complies with the relevant EU legislation and is CE-marked, it can circulate freely within the internal market, regardless of whether it is sold or provided free of charge. Economic operators throughout the supply chain share responsibility for maintaining safety and compliance.

Key regulations:

- Medical Device Regulation (MDR, EU 2017/745)
- In Vitro Diagnostic Regulation (IVDR, EU 2017/746).

Manufacturers outside the EU must appoint an EU-based Authorised Representative (AR), as required under MDR Article 11. The AR represents the manufacturer before authorities, shares responsibility for regulatory compliance, and coordinates with importers and distributors, who must verify CE marking, documentation, and continued conformity. All manufacturers, ARs, and devices must be registered with the Swedish Medical Products Agency (Läkemedelsverket) and pay an annual fee. A Free Sales Certificate is often needed by non-EU trading partners and can be issued by the Agency upon request. Parallel imports of CE-marked devices are allowed but must meet MDR/IVDR requirements, including Swedish-language labelling requirements.

Data protection and digital compliance

Digital health solutions must comply with:

- the General Data Protection Regulation (GDPR),
- the Swedish Patient Data Act (2008:355),
- the Act on Coherent Documentation in Health and Care Services (2022:913).

If sensitive personal data is processed, companies may be required to:

- conduct a Data Protection Impact Assessment (DPIA)
- appoint a Data Protection Officer (DPO)
- comply with Chapter V of the GDPR if data is transferred to non-EU countries.

Responsibility for oversight is shared between the Swedish Authority for Privacy Protection (IMY) and the National Board of Health and Welfare.

Preferred standards and certifications

Beyond CE marking, many Swedish importers expect suppliers to demonstrate adherence to additional quality and safety standards:

- ISO 13485 – Quality management systems for medical devices.
- ISO 14971 – Risk management throughout the device lifecycle.
- IEC 62304 – Software lifecycle for medical device software.
- HL7, FHIR, DICOM – Healthcare interoperability standards
- ISO 14155 and GCP (Good Clinical Practice) – Clinical trials and validation studies

For AI-based products, the International Medical Device Regulators Forum's (IMDRF) 10 Guiding Principles for Good Machine Learning Practices (2024 draft) and ISO 42001 (AI Management) are gaining relevance and may influence buyer preferences. Many healthcare organisations in Sweden also expect Medtech suppliers to align with ethical standards set out in industry agreements by Swedish Medtech, including transparency in value transfers and commercial relationships.

> *If you're entering the EU market, especially Sweden, you need to have your technical documentation aligned with the MDR. And it's not just compliance; they want to see that you understand how to present your product in their language, their setting.* – Oscar He, Key2Compliance

Import and customs considerations

Digital health solutions with physical components (for example connected devices, smart diagnostics) may be subject to customs duties and VAT. There are exemptions for non-profit or research use, but pre-authorisation must be obtained from Swedish Customs (Tullverket).

Emerging legislation to watch

EU AI Act – AI-based medical devices will be classified by risk level and may require additional conformity assessments, transparency, and explainability of algorithms.

> *The AI Act is coming, and there's ISO 42001 for AI management systems. It's not harmonised with MDR/IVDR yet, but likely will be.* – Oscar He, Key2Compliance

Cybersecurity – Expect higher standards for cyber security, data protection by design, and seamless integration with e-health infrastructure.

> *Integration is really key. And beyond that, ease of use is very, very important for successful implementation. Cybersecurity standards need to be at the very highest. Some hospitals don't allow any connectivity, and if that is the case, then it's a problem. But obviously, it needs to be approved by cybersecurity standards and also easy to integrate with the local hospital system.* – Hanna Sjöström, Neola Medical

Entering the market: Procurement processes in Swedish healthcare

Tender construction and procurement pathways

Tender construction in Swedish healthcare is often based on existing frameworks or larger system procurements (for example EHRs or medical platforms), which means standalone products are less frequently procured. Tenders tend to be shaped around what has already been purchased, which influences what can be added without triggering a new procurement. In order to remain competitive in tender procedures, it is important to fulfil requirements other than clinical requirements.

> *In critical care, it's important not only that the software is intuitive, but that it works fast. That means involving doctors and nurses in testing early on. User experience needs to be a top priority. Otherwise, software-heavy devices won't be successfully implemented in hospitals*. – Hanna Sjöström, Neola Medical

> *You need to have all the functionalities that they need; good user support; user friendliness; and cost-effective products. All four must be fulfilled to be selected.* – Helen Franson, Medviso

Innovation-friendly procurement models exist – such as Pre-Commercial Procurement (PCP) and Public-Private Innovation (PPI)) – but remain underutilised. Instead, many companies pursue workarounds, most commonly by leveraging existing procurement contracts to integrate new solutions as add-ons or modules. While this 'Trojan horse' approach can be effective, it often limits visibility and is best suited to companies that integrate into dominant platforms (for example Siemens).

Startups commonly struggle with cybersecurity readiness, limited 24/7 support, and incomplete regulatory compliance. Many also fail to scale because they rely too heavily on a single regional pilot, falling into the 'pilot trap', where testing occurs but no scalable contracts follow.

> *Sweden is seen as a very digital society, and technically it's not hard to integrate, but [...] it's hard to move from pilots to long-term implementation. [...] There are very few entry points. If you don't have prior relationships or come through Swedish Medtech, it's almost impossible. And smaller startups can't afford to be part of big industry groups.* – Helena Holma, Leyr

Digital infrastructure as an enabler

The shift toward modular IT infrastructure, such as Skåne's Data Lake and the Millennium platform, creates opportunities for more flexible, scalable digital health integration. These may lower entry barriers for companies that align early with integration and compliance requirements.

Despite its complexity, Sweden's procurement system offers multiple entry points. Companies that understand local workflows and engage stakeholders early improve their chances of long-term adoption.

Administrative challenges and early testing

Even CE-marked products can require additional steps for internal evaluation (for example usability testing with staff). Startups that proactively address this, and engage IT and clinical teams early, are better positioned to succeed. Mapping out the buyer's technical and reimbursement landscape is essential.

Procurement departments often prefer to source new solutions through existing framework agreements, which can streamline the purchasing process and avoid the need for lengthy public tenders. Aligning with partners already included in these frameworks significantly increases market access potential.

> *We initiated a study, not to prove clinical efficacy (we've already done that in a multi-center study), but to see how easily the product could be integrated into Swedish primary care. The ability to show this clinical and administrative efficacy is a crucial step for the commercial agreement.* – Erik Frick, Paindrainer

Direct procurement

Direct procurement (Direktupphandling) allows healthcare entities to bypass the formal tender process, provided that the total contract value does not exceed USD 74,200 per year, per supplier.[6] While direct procurement is administratively simpler, it should not be mistaken for a low-barrier entry point. Relationship building and compliance are still essential.

> *When we look at going to each region, you have something in Swedish called direktupphandling – or direct procurement. So, if you want to do procurement under that amount with a certain region, you can go directly, which is a slightly lower administrative burden. But that shouldn't be misunderstood as 'easy' – it's not.* – Erik Frick, Paindrainer

> *Our product is bought directly from us; we don't need to go through lengthy tender procedures. Buyers contact 2–3 vendors, test for a couple of months, then decide… It takes about a year from first contact until a decision is made… the process is fair and transparent, but could be faster.* – Helen Fransson, Medviso

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6 Upphandlingsmyndigheten (n.d.) Tröskelvärden och direktupphandlingsgränser. Available at: https://www.upphandlingsmyndigheten.se/regler-och-lagstiftning/troskelvarden-och-direktupphandlingsgranser/

Decision-making landscape

Procurement decisions are decentralised and highly context-dependent, often influenced by both formal hierarchies and informal networks. For software and IT-enabled solutions, navigating this landscape requires engaging multiple stakeholder groups, including clinical staff, IT departments, procurement teams, and executive management – each with distinct priorities and decision-making authority. Notably, IT departments often act as gatekeepers, but their involvement may come late in the process, which can delay implementation.

> *If you ask hospital management or the big bosses, the first thing they'll say is 'no standalone solutions.' That's one of the top constraints. Clinicians and companies might want to collaborate, but then months later, IT gets involved and starts asking cybersecurity questions like 'Where are your servers? Are you sharing data with the U.S.?'* – Erik Stenberg, Innovation Skåne

> *Procurement departments will have a discussion with surgeons about scientific materials and benefits. Surgeon involvement is critical – but saving time is not the key incentive here, like it is in the US – quality is.* – Henrik Björeson, Suturion

Regional testbeds are being developed to help companies connect with the right stakeholders early, offering a structured path to pilot testing and adoption.

Key takeaway: Market entry is rarely linear. Success depends on regulatory readiness, early stakeholder engagement, and aligning with existing systems and procurement practices.

Find a business partner

Building relationships with reliable Swedish partners is essential for exporters who wish to enter the market. Sweden's decentralised healthcare structure means procurement is often formalised, but there are multiple practical pathways to identifying and securing business relationships in Sweden.

How Swedish buyers find trade partners

Buyers often rely on passive methods (for example internet searches) or existing knowledge and rarely use structured processes.

> *Mostly they come up with procurement needs based on information available to them online or word of mouth.* – Erik Rask, MedBeat

> *To drive sales in Sweden, we primarily focus our attention on events like Smärtforum in October or Vitalis in May. Those are great opportunities to meet the right people. We also use our website and spend on Google and LinkedIn ads to reach our audience.* – Erik Frick, Paindrainer

The value of a local footprint

> *There is an advantage to being present in Sweden, because the buyers tend to be biased towards that.* – Henrik Björeson, Suturion

Establishing influence networks through clinical collaboration and research is a proven entry route, especially for new or complex technologies.

> *A typical approach to getting innovation through is that you have a clinical study with a hospital where you have key opinion leaders (...) and then hopefully you will get your first sale in that hospital. And then word of mouth comes from there.*
> – Hanna Sjöström, Neola Medical

Early adoption by large teaching hospitals creates downstream demand through exposure and user familiarity.

> *The best strategy for us has been to get into the big hospitals where people train.*
> – Helen Fransson, Medviso

Key industry and partnering events

Vitalis (Gothenburg) – The largest eHealth event in the Nordics, drawing healthcare providers, municipalities, and MedTech buyers.

Nordic Life Science Days (NLS Days) – a key partnering conference across life science and MedTech sectors, organised by SwedenBio

Medica (Germany) – although not Swedish, this is a major international fair that many Swedish buyers attend.

Business associations and other platforms for support

Business associations

Swedish Medtech is the main trade association for medical technology companies in Sweden. They offer networking opportunities and insights into local players.

LIF, the association for research-based pharmaceutical companies, includes stakeholders involved in digital health and combination products.

Swecare is a semi-governmental foundation promoting Swedish health and medical care expertise internationally. Today, it continues to be supported by the Ministry of Health and Social affairs and the Ministry for Foreign Affairs and the Confederation of Swedish Employers.

Innovation hubs and regional clusters

Sahlgrenska Science Park (Gothenburg) is a leading innovation hub focusing on healthtech, medtech, and life science. Supports startups and scale-ups with business development, access to clinical environments, and global collaboration platforms.

Karolinska Innovation (Stockholm), the commercialisation arm of Karolinska Institutet. Helps researchers and innovators bring medical and health-related innovations to market through IP management, funding support, and strategic partnerships.

SmiLe Incubator (South Sweden), specialises in life science startups, offering lab infrastructure, coaching, and investor access to accelerate early-stage ventures in medtech, diagnostics, and digital health.

Uppsala Innovation Center (Northern Sweden) is one of Sweden's top business incubators. Supports innovative companies across sectors, including digital health and medtech, with structured business coaching and access to regional and international networks.

Umeå BioTech Incubator (Northern Sweden) focuses exclusively on life sciences. Offers tailored support to biotech and medtech startups, from proof-of-concept to commercialisation, with strong ties to academia and clinical research.

Investment and cluster agencies

Invest in Skåne/ Gothenburg/ Stockholm Business Region are regional investment agencies with expertise in supporting healthtech and medtech companies.

Vinnova is Sweden's innovation support agency. It funds research and innovation based on national priorities and supports collaboration between public and private actors. For the MedTech sector, the strategic innovation program Medtech4Health is the key platform. It offers funding, facilitates academic collaboration, and connects innovators with the Swedish healthcare system.

Region Västerbotten & Uminova Innovation. The regional development entity Region Västerbotten collaborates with Uminova Innovation to support medtech R&D and innovation in Northern Sweden, including access to biobanks and international funding.

GoCo Health Innovation City is an emerging life science cluster next to AstraZeneca's Gothenburg site, designed as an open ecosystem for global companies, researchers, and startups to co-develop future healthcare and healthtech innovations.

Innovation Skåne is the regional innovation company of Region Skåne, supporting healthcare innovation and facilitating collaboration between startups, the public sector, and academia to drive the development and adoption of healthtech solutions.

Medicon Village is a major science park for life sciences in southern Sweden, providing lab and office space, business development, and a collaborative environment for companies and researchers in diagnostics, digital health, and biotech.

Medicon Valley Alliance is a Danish–Swedish life science cluster organisation that promotes cross-border collaboration, innovation, and internationalisation across the Øresund Region's medtech, biotech, and pharma sectors.

Additional support

Health Data Sweden (HDS) is a national ecosystem that brings together leading actors across Sweden. It provides specialised health data services tailored to the public sector and small to medium-sized enterprises in Sweden and across Europe.

Exporters can also leverage European or global support programmes to strengthen their market entry. This includes the Enterprise Europe Network (EEN), which facilitates matchmaking and collaboration across the EU.

Strategic partnerships in Sweden often make the difference in transitioning from a promising pilot to a long-term market presence. Exporters are encouraged to prioritise relationship building, local representation, and clinical validation to improve market access.

Tendsign is the primary digital procurement platform used by Swedish regions and public hospitals. Registered companies can access current tenders and submit offers.

Conclusions

Sweden presents a compelling market for digital medtech exporters, but success depends on preparation, strategic partnerships, and regulatory readiness.

Key takeaways:

- Sweden's decentralised health care structure offers multiple access points, but navigating it requires region-specific strategies.
- Public procurement emphasises value, integration, and sustainability. Buyers look for CE-marked, GDPR-compliant, and cost-efficient solutions.
- Digital health categories – such as diagnostics, remote monitoring, and AI-powered tools – are in high demand, especially if they integrate into platforms like EHRs.
- Strategic partnerships with local distributors, platform providers, or clinical institutions significantly improve market access.

Procurement decisions involve multiple stakeholders: clinicians, IT departments, procurement offices – each with distinct priorities. Buyers expect:

- CE-marking and EU regulatory compliance (MDR or IVDR)
- Alignment with the GDPR and Swedish Patient Data Act
- Proven quality systems (for example ISO 13485)
- Local technical support
- Ability to integrate with existing systems (for example electronic health records, cloud-based platforms)

Sales cycles can be long, but successful suppliers often secure stable, long-term partnerships once established.

To increase the likelihood of building lasting business relationships, exporters should:

- Provide transparent documentation on regulatory status, data protection practices, and performance.
- Adapt marketing and technical material to Swedish or English, including labelling, Instructions for Use, and data handling protocols.
- Highlight any certifications (for example ISO 13485, ISO 14971) and ethical or sustainability commitments.
- Consider working with a local agent or distributor, which many Swedish buyers prefer for service support and communication.

Exporters may also explore pilot projects or co-development partnerships, particularly through healthcare innovation platforms or EU-supported networks.

While Sweden's system may appear fragmented, its structure also enables regional pilots and tailored entry points.

Exporters should:

- View compliance not as a hurdle, but as a gateway to broader EU market access.
- Use indirect pathways such as partnerships with integrators or resellers to reach public buyers.
- Leverage health innovation hubs and funding mechanisms (for example Sahlgrenska Science Park, Vinnova) to strengthen their presence.

> *If a company comes and they say 'we want to do this and I know someone', then it works because there is trust. So, we need to institutionalise trust... I'm going to be the gatekeeper so that anyone knows who to contact, so we solve that problem. I can have a discussion with them to find exactly who [they are] and what they want to do... and then introduce them to one or two people that are a good fit.*
> – Erik Stenberg, Innovation Skåne

Exporters from low- and middle-income countries that offer trusted, interoperable, and digitally enabled solutions, especially those that align with Sweden's goals for sustainability, inclusion, and patient-centred care, will find growing opportunities in this forward-looking market.