



ROYAL DANISH EMBASSY  
Stockholm

# MARITIME DIGITAL INFRASTRUCTURE AND CONNECTIVITY

## STRATEGIC MARKET ENTRY PLATFORM

SWEDEN 2026



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# **STRATEGIC BACKGROUND**



## TOTAL DEFENCE REINFORCEMENT

The most substantial reinforcement of the total defence since the Cold War is now taking place in Sweden. The country is undergoing a strategic transformation in defence and resilience driven by:

- evolving geopolitical challenges
- NATO integration
- commitment to national preparedness

The Swedish approach is rooted in the Total Defence concept, widely regarded as one of the most comprehensive, future-oriented and adaptable defence models in Europe. This strategy is based on a whole-of-society approach, integrating military, civil and private-sector capabilities to protect national security.

## DUAL-USE LEGAL FRAMEWORK

The import and export of dual-use items is regulated by Regulation (EU) 2021/821 setting up a Union regime for the control of exports, brokering, technical assistance, transit and transfer of dual-use items.

The regulation is legally binding in all member states. In Sweden, the regulation is supplemented with the Dual-Use Items and Technical Assistance Control Act (SFS 2000:1064).

Sweden's Military Equipment Act (1992:1300) and regulation (1992:1303) specify permit requirements and other obligations for activities related to military equipment.

## BUDGET

Sweden is rapidly rearming in an international context and making major investments in both the civil and the military defence. The military defence is being allocated over **SEK 180bn** and the civil defence more than **SEK 37.5bn** from the national budget by 2030.

Currently set at **2.8% for 2026**, Sweden's military defence expenditure will reach **3,5%** of the GDP, while the expenditures for civil defence will amount to 1,5% by 2030 in an effort to proactively prepare for NATO's expected increase in member state's defence budgets.

In order to reach that level, Sweden will borrow **SEK 300bn**. This loan-financed defence investment will run from this year until 2030, after which the raised framework will be incorporated into the current defence budget until 2035.

The Government proposes allocating SEK 3 bn. to civil defence in 2026, SEK 4.2 bn. in 2027 and SEK 4.6 bn. in 2028. These proposals total approximately SEK 12 bn. in 2026–2028.

**3,5%**  
**of the GDP for**  
**military defence**  
**and**  
**1,5%**  
**for civil defence**  
**upgrades**  
**allocated by**  
**2030**





# WHY SWEDEN?

Sweden is home to one of Europe's most sophisticated and well-established defence technology sectors, with a strong export focus and capacity.



**5TH BIGGEST DEFENCE MARKET**



**13<sup>TH</sup> BIGGEST DEFENCE MARKET**

## THE TECHNOLOGICAL EDGE IS BUILT ON THREE STRUCTURAL ADVANTAGES

### Strategic autonomy and high R&D investment

- Sweden maintains a highly independent, European-oriented and self-sufficient defence industry, allowing it to develop and deploy advanced technologies without reliance on non-EU suppliers.
- Over **15%** of the combined annual turnover of the industry is reinvested into R&D.

**1**

### NATO interoperability and European defence integration

**2**

- Sweden's NATO accession has strengthened its alignment with European and transatlantic defence frameworks, making it a strategic link between Nordic, European and other NATO defence industries.
- Interoperability with NATO enhances Sweden's role in European security, offering joint defence procurement opportunities for Danish companies.

### The Triple Helix approach

- The Swedish Government maintains strong cooperation with private defence enterprises and aims at creating and maintaining frameworks that ensure rapid technology commercialisation and dual-use innovation.
- Swedish defence clusters include the major cities in Sweden - Stockholm, Linköping, Örebro and Gothenburg – which facilitate the triple helix cooperation, with a strong public, private and academia presence.

**3**





# MARITIME DIGITAL INFRASTRUCTURE AND CONNECTIVITY – SWEDISH CONTEXT AND VULNERABILITIES

Sweden's maritime digital infrastructure domain is a critical, high-value dual-use target. Recent concentrated damage to Baltic subsea cables and growing GNSS/cyber interference incidents demonstrate that an adversary can rapidly degrade Sweden's C2 systems, logistics and situational awareness without open kinetic warfare.

## CONTEXT SETTING

- Concentrated damage to Baltic subsea cables has risen sharply since 2023, creating real risk of partial or local connectivity loss that affects defence and civil systems. Recent reporting documents multiple cable incidents across the region.
- Major Swedish ports are rapidly digitalising (e.g. Gothenburg's Digital Port Call), increasing operational efficiency but also expanding the overall vulnerability to cyber-security breaches and attacks.
- Swedish authorities are developing shore-based navigation support and Smart Port Call initiatives. The increased operational risks that are present in the Baltic, require a holistic approach to Maritime Domain Awareness.
- GNSS jamming and spoofing in the Baltic is a known and demonstrable hazard. Monitoring and mitigation efforts exist but remain a capability shortfall for sustained operations.
- Sweden has a national cyber/digital security strategy that supports integration of digital resilience into wider security policy – this creates a policy lever for tighter civil-military standards and a higher degree of information sharing.



## PRINCIPAL VULNERABILITIES

**Connectivity single points:** subsea cables and single-provider satellite/terrestrial links can be severed or congested, degrading C2, logistics and port ops

**Expanded cyber/OT attack surface:** port IT/OT integration (digital port calls, port cranes, berth systems) creates entry vectors into critical logistics chains

**Navigation integrity risks:** GNSS jamming/spoofing can blind or mislead vessels and coastal sensors, which in turn poses serious security risks to the critical infrastructure

**Civil-military seams:** civilian systems often lack classification, segmentation or contingency interfaces for military use; legal and operational arrangements for rapid transition are immature.

**Detection and attribution delay:** distinguishing accident from sabotage (and proving attribution) is slow, limiting timely deterrent/response options



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# ● INTRODUCTION TO THE ● SCOPE YOUR BUSINESS MODEL+





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## USE SWEDEN'S STRONG MARKET POSITION

*Does your company deliver solutions within the digital maritime infrastructure and connectivity space? Then this program is for you.*

### MARITIME DIGITAL INFRASTRUCTURE AND CONNECTIVITY COMPANIES WISHING TO EXPLORE FIRST INTERNATIONALISATION OPPORTUNITIES

Join a select group of Danish SMEs in a 2-month SBM+ program designed to help you navigate the Swedish defence sector and explore maritime digital infrastructure market opportunities. Through expert guidance and tailored advice you will deepen your understanding of the market, validate your concept with our expert advisory board and build a strong foundation for market-entry, or market-maturing engagement.

### YOUR COMPANY GETS

- Unique understanding of one of Denmark's most important neighbouring markets
- A tailored go-to-market strategy for your company in Sweden
- Understanding of Swedish Defence Materiel Administration's procurement process
- Qualified market validation, feedback and direct solution sparring from key sector stakeholders in Sweden
- Opportunity to participate in pilot projects
- Valid network and knowledge of Sweden from day one.

### ACCESS OPPORTUNITIES IN SWEDEN

With solid experience from the Swedish market, we offer strategic guidance and access to a seasoned advisory board from the industry. This support is designed to help you refine your market approach and strengthen your business case for Sweden.

### TWO-STEP APPROACH

Our two-step approach begins with tailored strategic advice provides a gateway to new partnerships through participation in a market visit.

### FURTHER ENGAGEMENT

On the basis of this program, you can become a part of the Embassy's increasing activities in the dual-use space. From roundtables to Embassy Dialogues, you can meet the network the SBM+ will help you initiate, and get an even larger opportunity for first pilot-projects and clients in the market.





# PROGRAM TIMELINE

**3  
MARCH  
2026**



## WORKSHOP I: TARGETED MARKET KNOWLEDGE

- At this Workshop, we will tailor your business model via the Business Model Canvas methodology and help tailor your offering and pitch to the specific conditions of the Swedish market. This includes reviewing your current offering and identifying where strategic adjustments are needed to align with local expectations and regulations, including standards and more.
- In addition, you will gain a comprehensive overview of the defense-sector in Sweden, including its regulatory environment, key stakeholders, current infrastructure challenges and opportunities driven by new targets.
- We will explore the subtle cultural and market-specific differences that distinguish the Danish landscape from the Swedish one.

**23-24  
MARCH  
2026**



## WORKSHOP II: MARKET VISIT

**Sparring session with a specialised Advisory Board**, where you get further insight into your go-to-market strategy and address your solution-related questions in dialogue with key Swedish stakeholders.

**Insights** into how to navigate Sweden's public procurement landscape, become a supplier and build strategic partnerships within defence and security, provided by the Danish Embassy in Sweden and program partners.

## REPORTING

- Based on feedback from the Advisory Board, the Embassy will produce a go-to-market plan for your company, and detail the best strategy to enter the Swedish market.

**NEXT  
STEP**

**OPPORTUNITY TO SHOWCASE YOUR SOLUTION AT KONGSBERG'S CRITICAL MARITIME INFRASTRUCTURE (CMI) PROTECTION TEST BED AND EXPLORE PILOT OPPORTUNITIES WITH KEY MARKET STAKEHOLDERS**





## FOUR SOLUTION DOMAINS OF INTEREST

1

### UNDERSEA RESILIENCE AND CABLE PROTECTION

Protect and continuously monitor subsea critical infrastructure – data cables, energy interconnectors, pipelines and seabed sensors.

#### Ideal offerings and capabilities

- Autonomous underwater vehicles (AUVs)
- Autonomous underwater surveillance nodes
- Seabed communications network
- Rapid intervention ROVs/USVs
- Digital twin of seabed infrastructure

2

### SURFACE AND COASTAL MONITORING NETWORK

Achieve continuous situational awareness of Swedish territorial and adjacent Baltic waters through autonomous surface and aerial assets, integrated with radar and intelligence systems.

#### Ideal offerings and capabilities

- Autonomous surface vessels (ASVs/USVs)
- Coastal surveillance drones (UAVs) and counter-drone systems (C-UAV)
- Distributed sensor buoys
- Secure coastal communication

3

### CYBER AND DATA INFRASTRUCTURE SECURITY

Ensure all digital maritime data (AIS, sensor, navigation, port logistics) remains trusted, verifiable and resilient under hybrid or cyber disruption.

#### Ideal offerings and capabilities

- Hardened data exchange and cross-domain gateways
- AI-driven anomaly detection in network traffic
- Digital twin of maritime infrastructure

4

### COMMAND, CONTROL AND DECISION SUPPORT

Enable real-time decision-making and cross-agency coordination across military, intelligence and civilian actors.

#### Ideal offerings and capabilities

- Maritime Digital Operations Centre (MDOC)
- Autonomous Mission Management System (AMMS)
- Secure Data Cloud for MDA
- Simulation and wargaming platform





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## FOR MORE DETAILS AND REGISTRATION, CONTACT:

### PROGRAM FEE\*

**DKK 36,900** – full price in 2026 (non-SMEs) for full programme.

**DKK 9,225** – 75% reduced price in 2026 for SMEs, ensured by the Ministry of Foreign Affairs, for full programme. Max 7 companies.

Travel expenses not included.



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