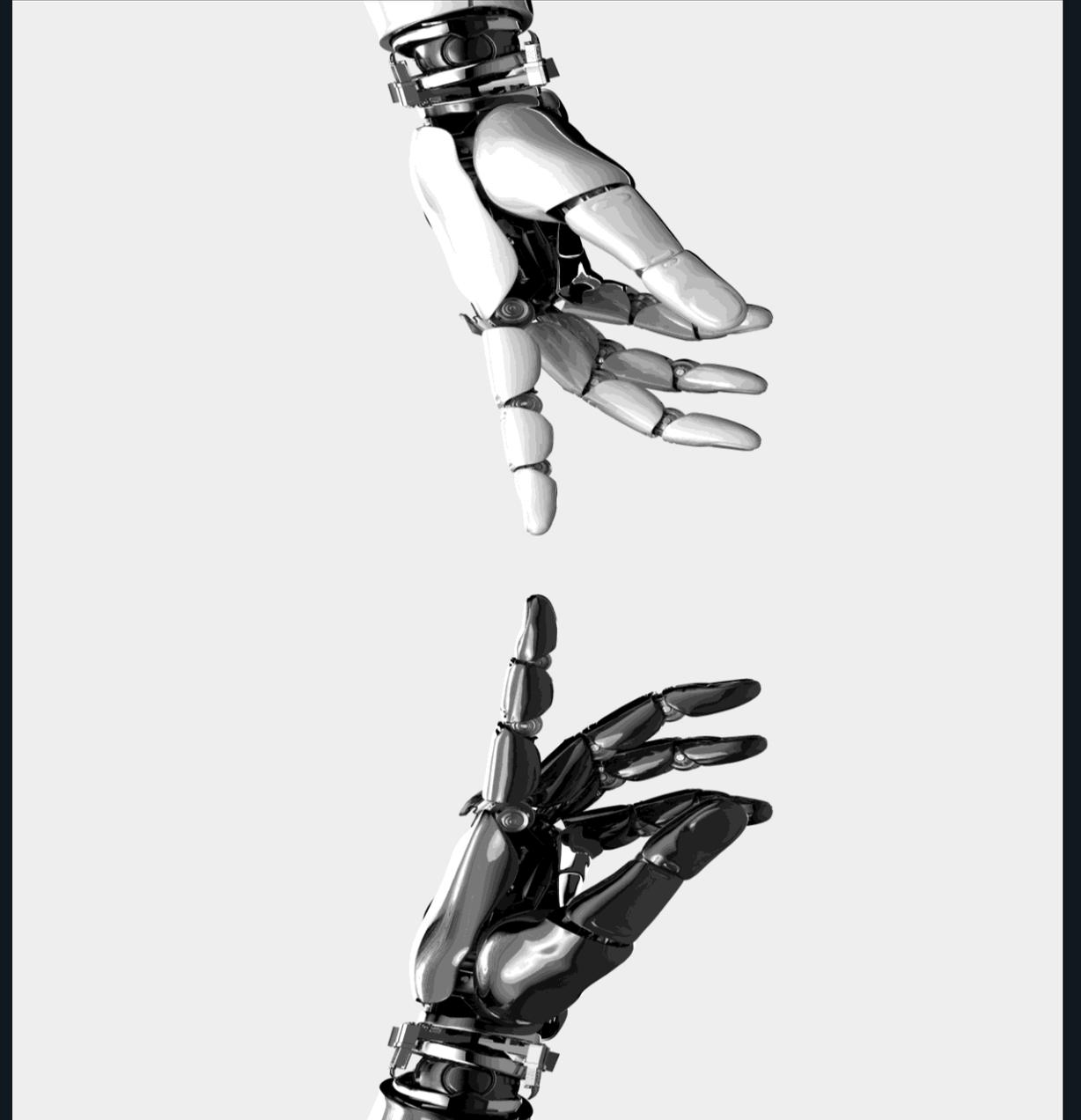


# From Innovation to Execution: Generative AI in the Swedish Manufacturing Industry

Generative AI Study 2026

January 2026, Gothenburg



# Generative AI and the future of Swedish manufacturing industry

A message from the author

” *With public debate lately focusing on unemployment, immigration challenges and high interest rates, it is easy to overlook Sweden’s continued leadership in innovation, technology adoption, and digital maturity. From established industrial leaders to a new generation of AI startups, Sweden consistently punches above its weight.*

*With the rapid development of the foundational AI models and startup ecosystem, I am convinced that generative AI will redefine how businesses operate and how value is created across society. The question is no longer if this transformation will occur, but how effectively organizations will respond.*

*Against this background, we wanted to investigate how well large, established manufacturing companies are leveraging the new capabilities emerging from the generative AI startup ecosystem. While this study focuses on generative AI adoption in the manufacturing industry, many of the findings and recommendations are highly relevant across other sectors as well.*

*We would like to extend our sincere appreciation to all industry leaders and startup representatives who contributed with their time and insights, making this study possible.*



**Gustav Karlsson**

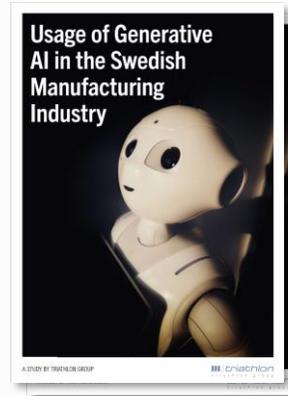
*Head of AI  
Triathlon Group*

## Triathlon Group

*Business improvement that matters.*

Triathlon Group is a Nordic, independent expert organization and a leading actor in business performance improvement. Since 1994, we have helped companies – from startups to market leaders – strengthen their international competitiveness.

# Our previous research provides a solid foundation for analyzing AI adoption in Swedish manufacturing industry



2023

## Generative AI usage & control:

The period was defined by the introduction of GenAI chatbots, with tools like ChatGPT gaining rapid public adoption. Companies, however, were less prepared and most lacked clarity on how to manage this new technology. Internal AI governance was weak. Two-thirds of the companies lacked an AI policy, only one in ten employees understood AI risks, and none of the interviewed companies offered AI trainings.



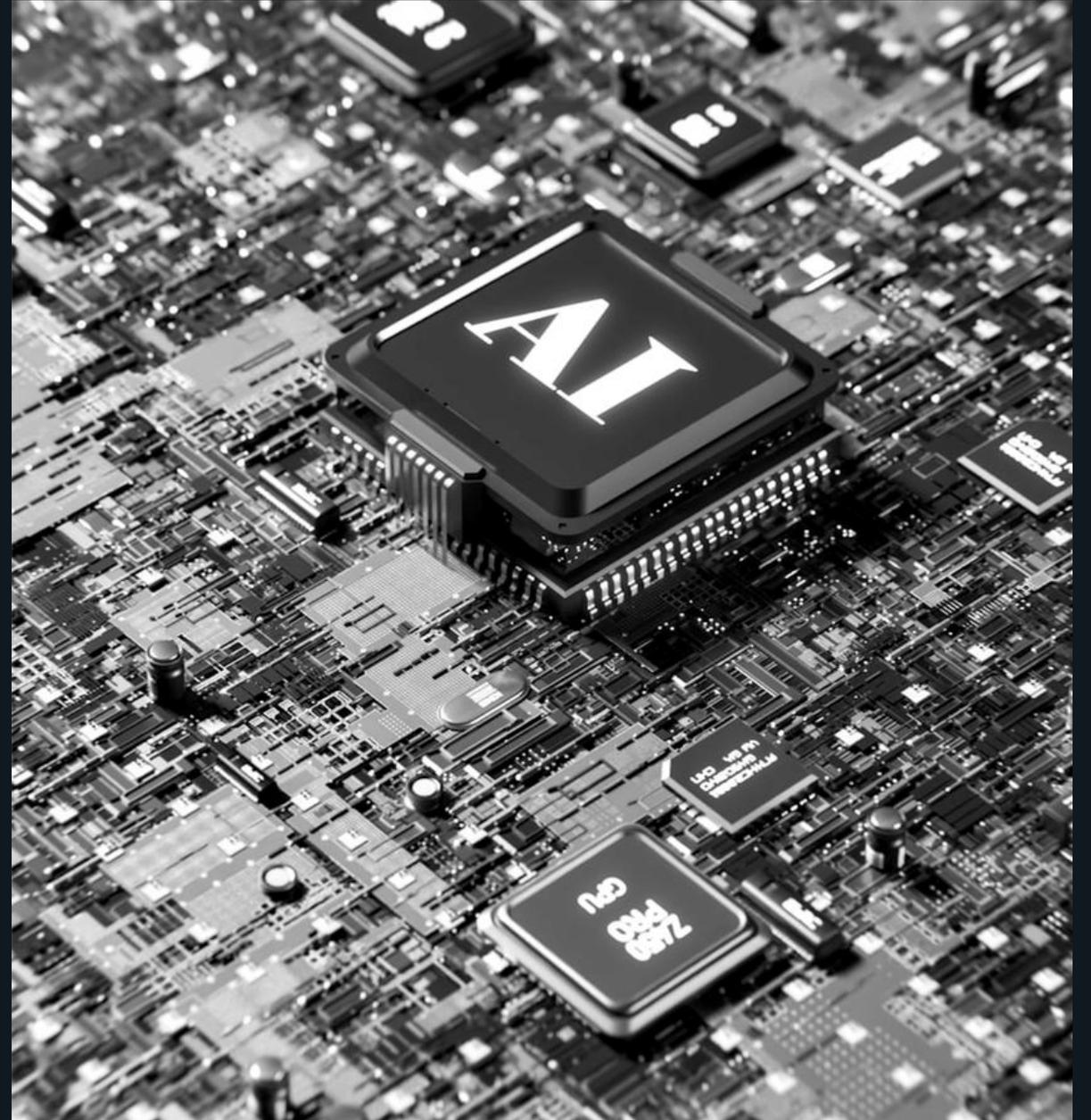
2025

## Strategy for AI adoption:

AI adoption was largely driven by generative tools such as ChatGPT and Microsoft Copilot, with more companies beginning to experiment beyond simple productivity use cases. Yet, half of the surveyed companies still lacked a clear AI strategy, and employees in operational roles were twice as likely as those in strategic roles to report the absence of plans to reach the AI targets.

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1. **Sweden – A global frontrunner in GenAI**
2. Current state of collaboration between industry and startups
3. Actionable steps to achieve successful GenAI adoption



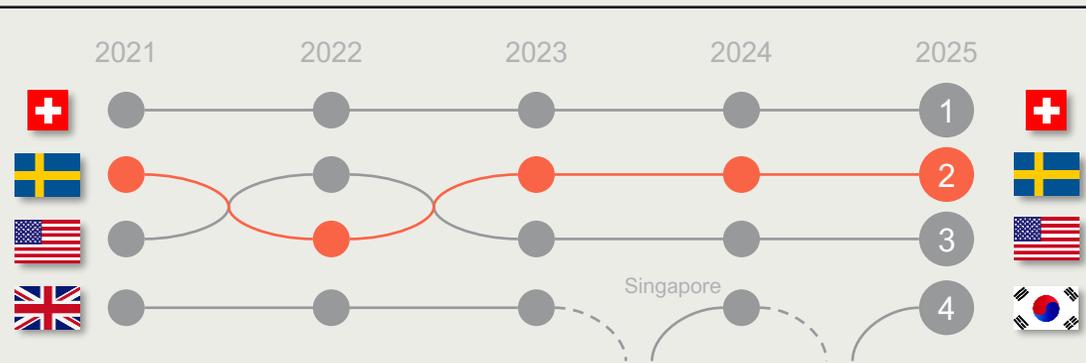
# Sweden's culture of innovation is translating into generative AI

## Background

### Sweden's legacy of industrial innovation

Sweden's industrial companies have long demonstrated world-class innovation, from manufacturing automation to engineering excellence. Early electrification, advanced telecom networks and widespread cashless payments all reflect how quickly new technologies become part of everyday life. Supported by strong institutions, high digital literacy, and broad trust in technology, Sweden consistently ranks among the **top 3 performers in the Global Innovation Index<sup>1</sup>**, creating a fertile environment where new ideas can spread rapidly and gain traction across industries.

### Sweden's placement in the Global innovation index<sup>1</sup>



### A culture of early adoption and forward thinking

Sweden's innovation strength is reinforced by a society that embraces new technologies faster than most. This openness has enabled new solutions to scale quickly and helped build a modern digital landscape that produced global successes such as Spotify, Klarna, and King. These companies reflect a broader **cultural willingness to experiment**, challenge established norms and adapt as technologies evolve.

### Acceleration of AI in Sweden

Today, this same set of cultural and institutional strengths is positioning Sweden to **punch above its weight in the global Generative AI (GenAI) landscape** where Swedish companies are emerging as global frontrunners. Notable examples include Lovable, Sana and Legora which all have reached a billion-dollar valuation and are contributing to the country's rising global presence. This growth once again reflects a robust ecosystem of talent, research excellence, and industry-driven development.

# Can Sweden close the gap between industry and innovation?

## About Triathlon Group's GenAI Study

Sweden occupies a favorable position, with a **prominent GenAI startup landscape** and a manufacturing sector where innovation continues to be a strategic priority. As the pace of technological development accelerates, these strengths make it increasingly important to understand how GenAI is and will reshape the manufacturing sector. The rapid emergence of new solutions and capabilities creates both opportunities and challenges, underscoring the need for a clearer view of how the ecosystem is evolving.

Triathlon Group set out to understand how the **Swedish manufacturing industry** is responding to recent advancements in GenAI and to **what extent collaboration is forming** with the emerging startup ecosystem. The study is focused on assessing the broader range of GenAI solutions now starting to emerge, not the adoption of widely known tools such as ChatGPT or Microsoft Copilot.

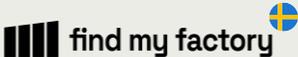
The findings presented in this study are based on **in-depth interviews** with executives from Sweden's largest manufacturing companies and prominent GenAI startups. The study has been supported by an analysis of the current startup ecosystem across six functional areas. In the Appendix, one can find a more detailed breakdown of these six areas.



***Triathlon Group holds a strong expertise and client base in manufacturing, complemented by deep capabilities in leading change and digital transformation***

# Non-exhaustive GenAI startup analysis for selected functions

When analyzing prominent GenAI companies, it is notable that many of the leading firms in this landscape are Swedish, highlighting both the breadth and maturity of Sweden's GenAI ecosystem.

Sales			
Marketing			
Admin			
Legal			
Recruiting			
Procurement			

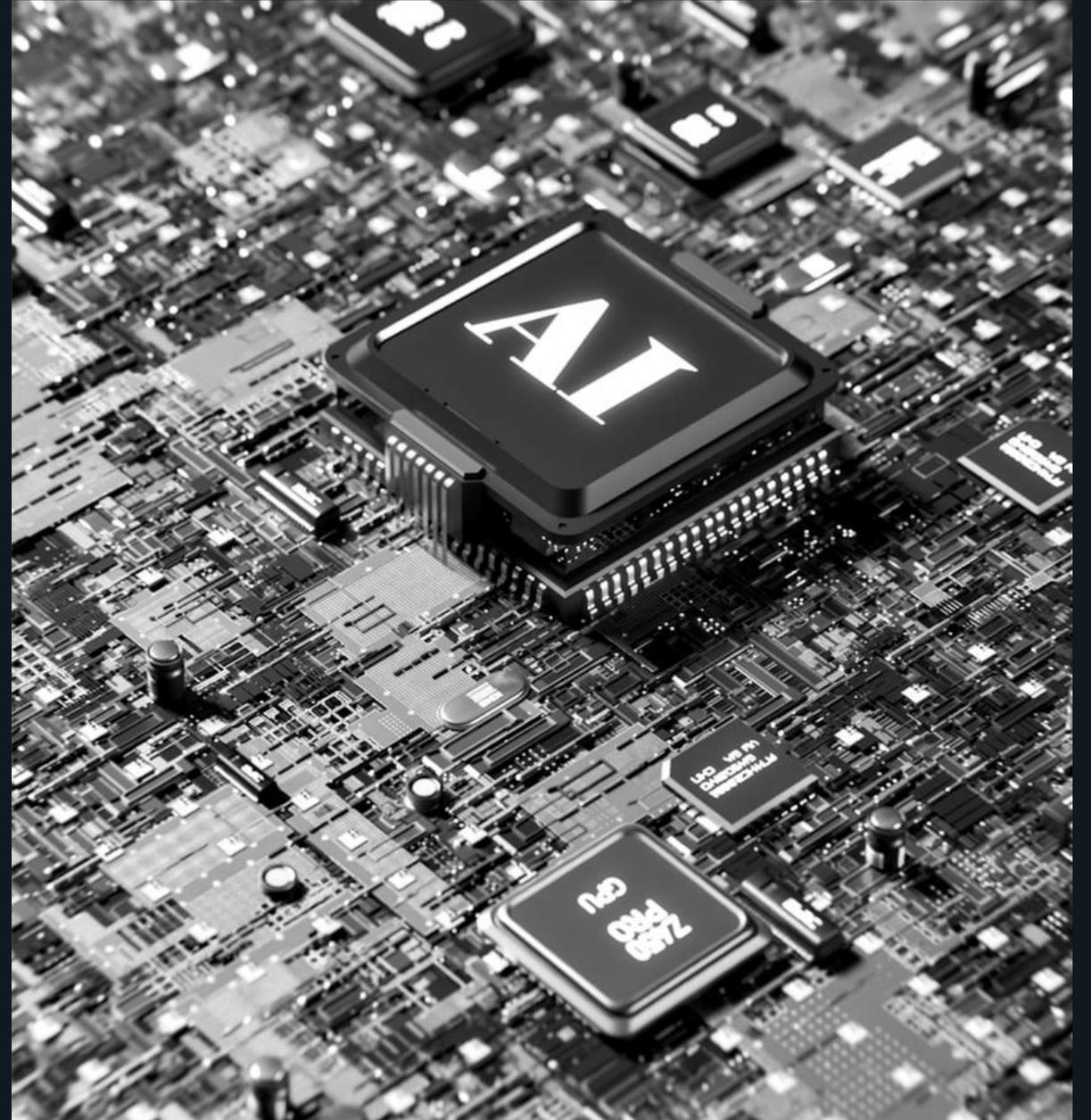
# Swedish companies at the forefront of the GenAI landscape across multiple functions

Deep-dives and case examples available in Appendix



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# Half of Sweden's manufacturing sector is adopting GenAI solutions beyond conventional chatbots

## GenAI adoption rate

GenAI has gained widespread public attention, and many companies within Sweden's manufacturing sector have already begun exploring its potential. General-purpose tools like ChatGPT and Microsoft Copilot are now widely used, but many companies still limit themselves to these well-known solutions, applying them mainly for individual productivity gains or simple knowledge queries. Worth highlighting is that the usage of **general-purpose AI tools has increased from 75% in 2023 to 100% in 2026**.

However, while the study shows that all contacted Swedish manufacturing companies rely on at least one mainstream GenAI service, only **around 50%** have advanced to implementing customized or **domain-specific GenAI services**<sup>1</sup>.

Among those moving forward, many are now deciding whether to build these solutions in-house or work with external partners, an important choice shaping how quickly and effectively GenAI becomes integrated in their operations.

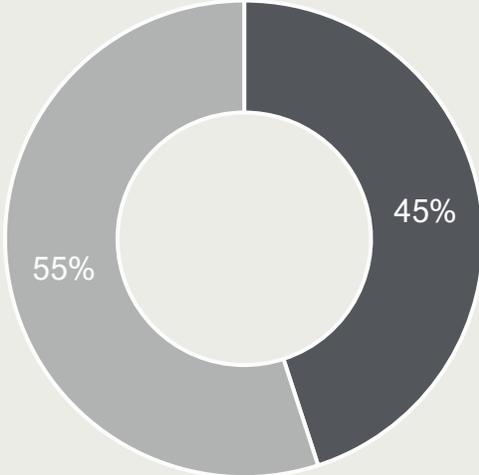


*It is the companies that do not adapt to the new technology that will struggle with the change*

Co-founder, GenAI startup

<sup>1</sup>: "Domain-specific Gen AI solutions" is in this context referring to tailored solutions, going beyond using ChatGPT or Microsoft Copilot without any major adaptations

## Adoption of domain-specific GenAI solutions<sup>1</sup>



■ Implemented  
■ Not implemented

# One in four of the Swedish manufacturing companies partner with GenAI startups

## Developing in-house vs external GenAI partners

Many companies developing customized GenAI solutions prioritize in-house development, even though commercial off-the-shelf products are becoming increasingly available and capable. While internal development offers benefits in terms of control, customization, and data security, it also requires substantial time, resources, and technical expertise.

Survey results indicate that more than **three out of four** companies which are building custom GenAI solutions do so **internally**. This stands in contrast to research from MIT<sup>1</sup>, which highlights that companies engaging external partners experience twice the success rate compared to those relying solely on in-house development.

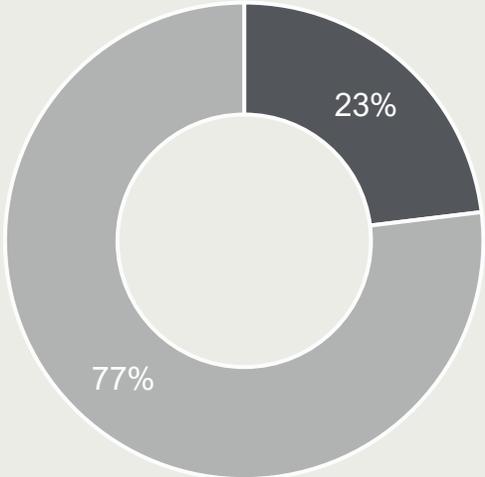
Relying exclusively on internal teams may not only reduce the likelihood of successful implementation of GenAI initiatives, but it also limits exposure to innovative, fast-moving technologies. Meanwhile, Sweden's AI startup ecosystem has matured rapidly and now offers far more relevant solutions than are currently being adopted. This begs the question: **what is preventing manufacturing companies from collaborating with these emerging companies?**



*Adoption comes mainly from more modern tech companies. In traditional industries, like manufacturing, AI is met with more caution.*

CEO, GenAI startup

## Development approach for domain-specific GenAI solutions



- Through partnerships
- In-house development

# Data security, unclear investment returns, and long procurement processes hinder collaboration

## Roadblocks for GenAI adoption through partnerships

### Complex and drawn-out procurement processes

The study’s findings indicate that long and complex procurement processes in large manufacturing companies often operate on a scale and pace that differ significantly from those of startups. Multiple internal functions, such as IT, compliance, legal, and central purchasing, must be involved, resulting in a lengthy and resource-intensive process. These **procedures tend to favor large and established vendors** with mature structures and proven stability, which startups usually lack. Moreover, startups often operate under shorter financial horizons and faster sourcing cycles, creating a mismatch where their financial runway is sometimes shorter than the procurement process itself. As a result, they rarely make it through procurement unless they address a very specific and high priority need.

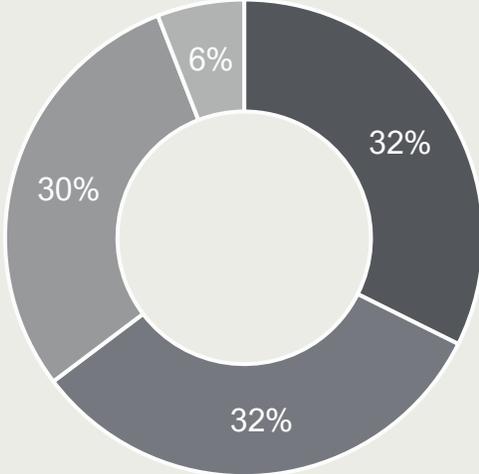
### Data security & compliance concerns

Concerns about **data security and regulatory compliance risks** are mentioned in the survey as key reasons for not collaborating with GenAI startups. Instead of engaging external partners, many manufacturing companies choose to develop GenAI solutions in-house, where they feel they can maintain stricter control over sensitive data, ensure compliance with internal policies, and manage perceived risks more directly.

### Uncertain ROIs

Survey responses indicate that several manufacturing companies often **lack awareness of existing GenAI solutions** and **struggle to assess their potential value**. As a result, they find it difficult to determine what these solutions could offer, which in turn prevents them from exploring potential collaborations with startups. This lack of awareness and understanding creates a barrier to adoption, as companies and startups struggle to connect and identify mutually beneficial use cases.

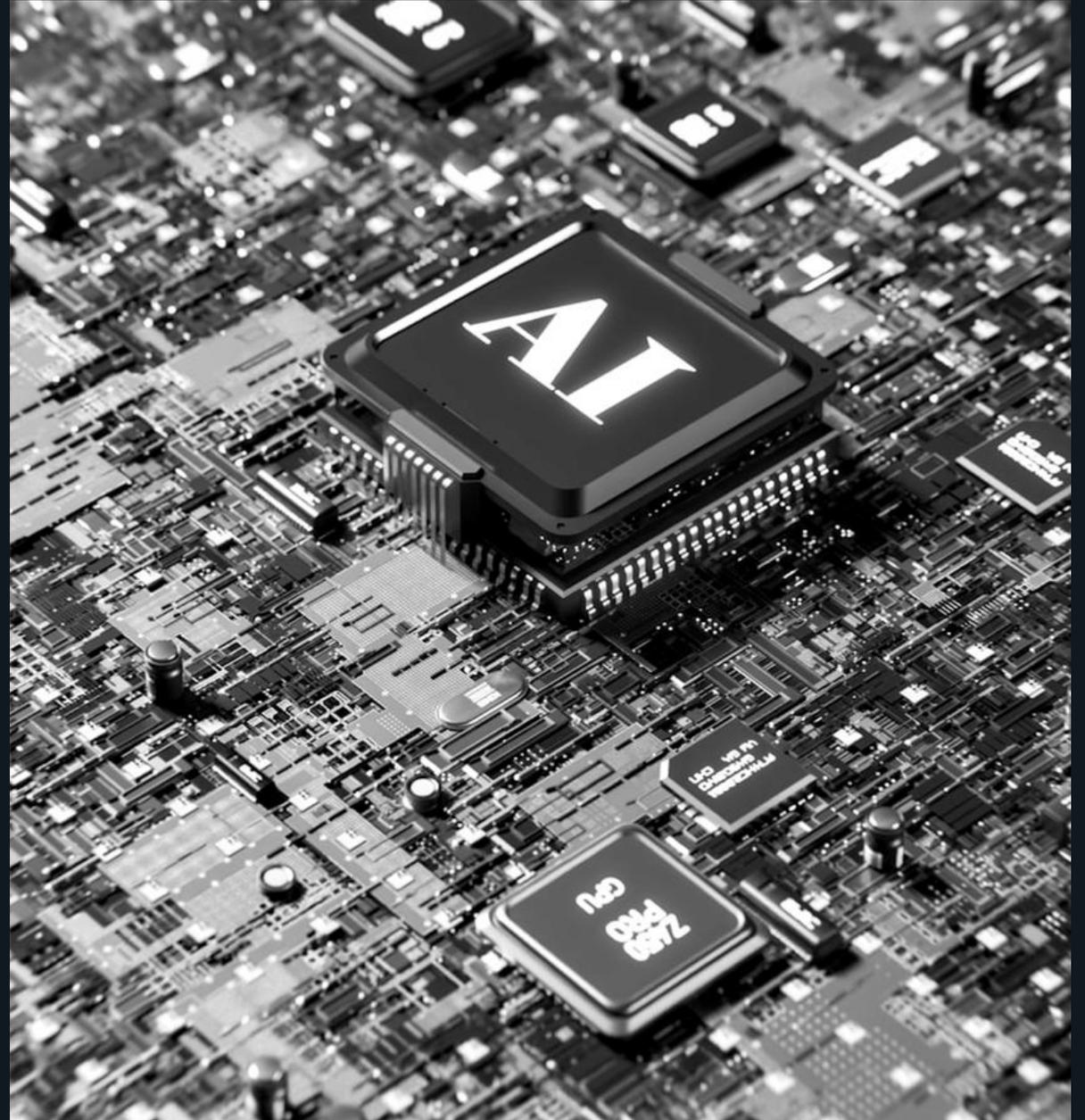
Main roadblocks for GenAI adoption through partnerships



- Procurement process
- Data security & compliance
- Uncertain ROI
- Other

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# Three actions for manufacturing companies to increase collaboration with GenAI startups

## Achieving successful GenAI adoption

While many organizations recognize the potential of partnerships, only a **few have taken concrete steps**. Interestingly, those that do collaborate report few major challenges once the integration begins, suggesting that **perceived risks are often greater than actual obstacles**.

To effectively form strategic partnerships, organizations should consider the following key activities:

### 1 Allocate budget and time for exploration

1 There is vast value to unlock by working with startups and adopting new technology, but manufacturing companies need to consider allocating more time and resources for exploratory work to quicker identify and evaluate new solutions, even when the ROI is uncertain.

### 2 Enable fast adaptation through accelerated processes

2 Be open to speed up existing procurement, data security, and compliance processes to enable faster and simplified adoption.

### 3 Assess compatibility

3 Assess the maturity of the potential startup partners and evaluate your own company's capabilities and readiness, including any changes required to internal systems to support integration.





# Three actions for GenAI startups to increase collaboration with manufacturing companies

## Achieving successful GenAI adoption

While many startup companies offer exciting solutions and technologies, they must clearly communicate and fully **understand what specific value** that manufacturing companies are seeking. Simply reducing the time required for a particular task is not enough, the improvement must be tied to a **tangible ROI**, such as reduced headcount, increased output, or higher sales. Also, it is equally important to offer a **frictionless customer experience** as it is to offer a high-value service.

To lower the barriers for manufacturing companies to form strategic partnerships, the startup companies should consider the following key activities:

- 1 Demonstrate clear differentiation**  
Startup companies need to differentiate themselves by emphasizing the concrete value of their product, rather than selling the idea that they are an AI company.
- 2 Be proactive with data security & compliance**  
Be prepared for extensive data security and compliance audits before starting new partnerships and have the required documentation prepared.
- 3 Simplify and streamline integration**  
Minimize entry barriers by providing clear guidelines, timelines and implementation requirements that make integration into the manufacturing company's processes and systems as simple as possible.

For questions or interest in receiving a presentation of the GenAI report, please contact **Triathlon Group**

## Contact us

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# Appendix

# GenAI startup analysis

## Sales

### Overview of capabilities

GenAI is reshaping and transforming sales departments and customer engagement by automating tasks, analyzing data and increasing reach. Below you find some tasks where these tools can be leveraged:

- Identify relevant leads
- Automatize and personalize outreach & respond activities
- Quality control communication
- Analyze and gain insights from thousands of customer interactions



*Extracting reports from various systems was so time consuming. Now all business metrics are available in one place.*

GenAI user in Sales

### Example of improvements presented by startup companies

**3x**

Increase in qualified lead

**80%**

Reduction in costs

**55%**

Improvement in response rate

## Sales



## Marketing



## Admin



## Legal



## Recruiting



## Procurement



# GenAI startup analysis

## Marketing

### Overview of capabilities

GenAI is already creating tangible value in marketing and design by streamlining how teams create, manage and personalize content. Below you find some tasks where these tools can be leveraged:

- Automate content creation, visual design, and brand communication
- Personalize campaigns and adapt messaging to different audiences
- Ensure consistent visual identity and quality across all channels



*We think this is the future of investor relations. The feedback has been excellent since we started.*

GenAI user in Marketing

### Example of improvements presented by startup companies

**30x**

Faster

**70%**

Reduction in costs

**50%**

More efficient

Sales



Marketing



torre.ai

Admin



SUPERNORMAL

Legal



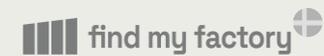
Harvey.

Recruiting



Omneky

Procurement



Globality

# GenAI startup analysis

## Admin

### Overview of capabilities

Back-office represent one of the highest-ROI opportunities. By automating both routine and complex tasks, organizations can reduce costs. Below you find some tasks where these tools can be leveraged:

- Automate repetitive back-office processes such as invoice handling
- Automate complex activities such as M&A due diligence
- Improve documentation, compliance, and scalability across internal operation



*It has transformed the way we approach meetings, enabling true presence and greatly reducing our post-meeting documentation*

GenAI user in Admin

### Example of improvements presented by startup companies

**10 min**

To set up

**99%**

Accuracy

**80%**

Time saved

Sales



Marketing



torre.ai

Admin



SUPERNORMAL

Legal



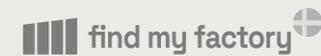
Harvey.

Recruiting



Omneky

Procurement



Globality

# GenAI startup analysis

## Legal

### Overview of capabilities

GenAI is reshaping Legal and compliance functions by accelerating work that depends on extensive documentation and research. Below are examples of tasks where these tools can be leveraged:

- Review contracts, extract key clauses, and identify potential risks
- Synthesize case law, regulations, and internal documentation
- Enable legal and compliance teams to shift from reactive to strategic work



*As a modern law firm, we must be at the forefront of AI development*

GenAI user in Legal

### Example of improvements presented by startup companies

8h

Saved per lawyer per week

10%

Reduction on outside counsel reliance

95%

Faster in certain task

Sales	Scape	Alta	instantly
Marketing	Klingit	VERSANCE.AI	torre.ai
Admin	Normain	Stilla AI	SUPERNORMAL
Legal	Vesence	LEGORA	Harvey.
Recruiting	Tenga	Talentium	Omneky
Procurement	find my factory	ivalua	Globality

# GenAI startup analysis

## Recruiting

### Overview of capabilities

Recruitment processes are being reshaped by GenAI by improving efficiency, objectivity, and the overall candidate experience. Below are examples of tasks where these tools can be leveraged:

- Summarize interview insights and identify top talent faster
- Enable more transparent, data-informed hiring decisions



*We found talents for roles that don't exist while reducing hiring costs by 70%*

GenAI user in Recruiting

### Example of improvements presented by startup companies

**3x**

Faster time to hire

**95%**

Complete their interview

**94%**

Of candidates recommend

Sales



Marketing



Admin



Legal



Recruiting



Procurement



# GenAI startup analysis

## Procurement

### Overview of capabilities

Procurement functions are being strengthened by GenAI through improved supplier analysis, decision-making, and cost management. Below are examples of tasks where these tools can be leveraged:

- Analyze and benchmark supplier performance at scale
- Identify diversification opportunities to reduce dependency and risk
- Support cost optimization and savings through AI-driven insights
- Accelerate contract review, demand forecasting, and market analysis



*We've entered a new world in procurement, and GenAI has made this vision come true*

GenAI user in Procurement

### Example of improvements presented by startup companies

**3x**

Faster supplier discovery

**50%**

Cost saving by diversifying and benchmarking suppliers

**15x**

More suppliers discovered

Sales



Marketing



Admin



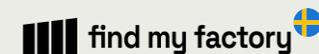
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Recruiting



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