



Ministry of Foreign Affairs

# **Ireland**

# **Connected Health, MedTech & Healthy Ageing**

## **Market Study 2025**

*Commissioned by the Netherlands Enterprise Agency*

*>> Sustainable. Agricultural. Innovative.  
International.*



# Ireland

Market Study 2025

Connected Health, MedTech & Healthy Ageing





# EXECUTIVE SUMMARY

## April 2025

This report explores market entry strategies for Dutch Life Sciences & Health (LSH) companies looking to establish presence in Ireland. Ireland presents a strong and dynamic LSH ecosystem, driven by multinational corporations, research institutions, and government support for innovation. Ireland offers opportunities for companies specializing in Connected Health, MedTech, and Healthy Ageing.

### Future of the LSH Sector in Ireland

Ireland's healthcare sector is undergoing transformation, driven by digitalization, an ageing population, and the need for more efficient healthcare delivery. The Irish government has expressed strong support for telemedicine, and integrated healthcare solutions. While Ireland has a robust MedTech manufacturing sector, there is a growing demand for digital health innovations, particularly in AI-driven diagnostics, and remote patient monitoring. Additionally, ageing-in-place initiatives are gaining traction, increasing demand for assistive technologies and home-based healthcare solutions.

### Opportunities for Dutch LSH Companies

The Irish government has prioritized telehealth, remote monitoring, and assistive technologies, creating a favorable environment for Dutch businesses with expertise in these fields. Companies offering solutions in personalized healthcare, AI-driven medical tools, and sustainability-focused healthcare innovations are well-positioned to succeed. Key stakeholders in the Irish healthcare sector include public organisations such as the Health Service Executive (HSE), private hospitals, academic research institutions, and industry clusters. Collaboration with these entities can open doors for Dutch companies seeking local partnerships and market integration.

### Route to Market

Entering the Irish market presents many opportunities but also challenges such as complex procurement processes, data protection regulations, and competitive market dynamics. Companies must navigate the differences between public and private healthcare procurement and be aware that voluntary hospitals may opt out of national tenders. Dutch companies should prioritize building strong local partnerships, attending key industry events, and tailoring their offerings to align with Ireland's healthcare priorities.

To successfully enter the market, companies can adopt various business models, including direct sales, partnerships with local distributors, or establishing joint ventures with Irish companies. Additionally, setting up a local presence, whether through a subsidiary or a strategic alliance, can help navigate regulatory frameworks and foster stronger relationships with key stakeholders.

### Conclusion

By leveraging Ireland's growing demand for health solutions, strategic partnerships, and industry events, Dutch LSH companies can establish a strong foothold in this evolving market. The most effective approach is to combine market-specific expertise with a strong local network, ensuring compliance with Ireland's regulatory environment while addressing the country's pressing healthcare needs. Companies that align their offerings with Ireland's focus on Connected Health, MedTech and Healthy Ageing solutions will have potential for success.



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## OUR APPROACH

# TASK FORCE HEALTH CARE

## IMPROVING HEALTH CARE TOGETHER

Established in 1996, Task Force Health Care (TFHC) is a public-private not-for-profit platform that represents and supports the Dutch Life Sciences & Health (LSH) sector. Our platform has a reach of 1,200 LSH organisations in the Netherlands, with one hundred dedicated and diverse partners. Our partners include government, industry, knowledge institutes, NGOs, and healthcare providers.

Our core mission is to improve healthcare and well-being internationally and in a sustainable and demand-driven manner, with the use of Dutch expertise. We are currently actively engaged with over twenty countries to stimulate and facilitate relationships on government-, knowledge- and business levels. Our partners are active around the world and provide innovative and sustainable solutions relevant to both global and local health care challenges.

### A PROGRAMMATIC APPROACH

Bridging Knowledge, Aligning Interests, and Identifying Opportunities

.....

Fostering and Strengthening Networks

.....

Facilitating Dialogues on Health Themes and Opportunities to Collaborate

### OUR FOCUS

➤ Mutual Interests and Benefits

➤ Developing Sustainable and Long-Term Approaches

➤ Demand-Driven and Context Specific

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# LIST OF ABBREVIATIONS

AI	Artificial Intelligence
ANPs	Advanced Nurse Practitioners
CDM	Chronic Disease Management
DoH	Department of Health
DTx	Digital Therapeutics
ECC	Enhanced Community Care
EHR	Electronic Health Record
EU	European Union
FCPs	First Contact Practitioners
FDA	Food and Drug Administration
FemTech	Female Technology
GDP	Gross Domestic Product
GDPR	General Data Protection Regulation
GP	General Practitioner
HPRA	Health Products Regulatory Authority
HI	Healthy Ireland
HIHI	Health Innovation Hub Ireland
HIT	Health Information Technology
HSE	Health Service Executive
HQ	Head Quarters
ICCMS	EHRs for Community programme
ICT	Information and Communication Technology
IMA	Irish Medtech Association
IoT	Internet of Things
IP	Intellectual Property
IPPOSI	Irish Platform for Patient's Organisations, Science & Industry
IVDR	In Vitro Diagnostic Regulation
JV	Joint Venture
LSH	Life Sciences & Health
MDR	Medical Device Regulation
MedTech	Medical Technology
MNCs	Multinational Companies
NCPOP	National Clinical Programme for Older People
POC	Point of Care
PPP	Public-Private Partnership
R&D	Research & Development
RVO	Rijksdienst voor Ondernemend Nederland
SaaS	Software as a Service
SIIF	Sláintecare Integration Innovation Fund
VAT	Value Added Tax
VBPs	Value-Based Partnerships
VR	Virtual Reality
UK	United Kingdom
US	United States

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# COUNTRY COMPARISON

	Ireland	Netherlands
Land area (km²) (2024)	68,898	41,850
Population (2023)	5,307,600	17,877,117
<i>annual growth (%) (2023)</i>	2.7	1.0
Population density (people per sq. km of land) (2022)	75	521
Population aged 65 years and older (%) (2023)	15.54	20
<i>expected in 2050 (%)</i>	30	27.7
Maternal Mortality Rate (per 100 000 births) (2019)	5.5	4
Life Expectancy at Birth (2022)	83	82
Healthy Life Expectancy (2021)	70	71.4
Life Expectancy Global Rank (2022)	16	18
GDP total (2023, USD millions)	551,390.00	1,150,000.00
<i>annual growth rate (%) (2023)</i>	-5.5	0.1
GDP per capita (2023, USD)	103,887.8	64,572.0
<i>growth rate (%) (2022)</i>	1.9	3.5
Ease of Doing Business Rank (2019)	24	42
Market size for medical devices (USD billions) (2024)	1.28	4.7
<i>expected annual growth 2025- 2029 (%)</i>	4.36	4.88
Type of Health System	Two-tier health system combining a public and private healthcare sector.	Dual-level system with universal social health insurance
Health Expenditure % of GDP (2022)	6.1	10.2
<i>per Capita (USD) (2022)</i>	6,047	6,729
Private health expenditure as % of total HE (2022)	12	34.1
Out-of-pocket expenditure as % of total HE (2021)	10.7	9.8
Hospital beds per 1 000 population (2021)	2.94	3.0
Physicians per 1 000 population (2021)	4.1	3.8
Nurses and Midwives per 1 000 (2020)	11.6	11.3

*Table 1: Country Comparison (Accumulated data from: World Bank Group, WHO, OECD, Statista, OECD Health at a Glance 2023 Report).*

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# 1. INTRODUCTION

## 1.1. An Introduction to the Study

Ireland's Life Sciences & Health (LSH) sector is a global leader in medical devices and pharmaceuticals, hosting many top multinational companies (MNCs). Its growth is driven by a supportive government, a strong research & development (R&D) ecosystem, and a focus on connected health innovation, highlighted by the 2023-2030 Digital Health Framework. With an aging population and opportunities in healthcare and age-related markets, Ireland's National Positive Ageing Strategy further underscores this potential.

This study provides insights into Ireland's evolving LSH sector, focusing on Connected Health, Medical Technology (MedTech), Healthy Ageing, and highlights opportunities for Dutch healthcare solutions. Ireland's stable political climate, strong academic community, and conducive environment for international collaboration make it an ideal market for Dutch LSH organisations to explore opportunities, navigate regulatory landscapes, and establish sustainable partnerships.

## 1.2. About this Study

Commissioned by the Dutch Embassy in Dublin and produced by Task Force Health Care (TFHC) in collaboration with the Netherlands Enterprise Agency (RVO), this market study provides insights into the LSH sector, focusing on Connected Health, MedTech, and Healthy Ageing. It aligns opportunities with Dutch capabilities and highlights sectors with trade and business potential. The pharmaceutical sector is not included in this report, as it is a distinct sector within LSH that involves a wide range of stakeholders and requires a separate approach. The study aims to foster sustainable collaboration between the Netherlands and Ireland in trade, research, and innovation.

### Objectives

The main objective of this market study is to provide a comprehensive overview of the local landscape, needs, and opportunities within the LSH sector in Ireland. This market study includes four specific focus topics:

- Overall trends & developments and in specific in the three sub-sectors (Connected Health, MedTech, Healthy Ageing)
- Strengths & Weaknesses in Dutch LSH sector and (trade) opportunities for Dutch LSH organisations (export of products, innovations, knowledge and services)
- Route to market (strategy and right route to the market, the dos and don'ts of doing business in the Irish LSH market)
- An overview of relevant stakeholders in both public and private sector

## 1.3. Methodology

A qualitative research method was used to analyse and systematically collect information on the Irish LSH sector and how this enables collaboration opportunities with the Netherlands. This required a combination of methodologies and multiple sources of data collection, including a desk research and expert interviews.

For this report, a systematic desk research approach was used to analyse the latest available secondary data, including government documents, reports, and academic literature. To ensure data validity, the information obtained from desk research was cross-checked during expert interviews. These interviews, conducted in person during the TFHC's organized visit to Dublin and Galway in February 2025, provided valuable insights and further validated the gathered data. The organisations interviewed are listed in Annex 2, along with Dutch support organisations in Annex 3. Additionally, interviews with Dutch companies providing products or services within the LSH sector in Ireland were conducted to validate previous experiences. To minimize bias and enhance validity, most interviews were semi-structured and conducted by two researchers.

## 2. FUTURE OF THE LSH SECTOR IN IRELAND

### 2.1. Introduction to Ireland and the LSH sector

Ireland, also known as the Republic of Ireland, is part of the Island of Ireland which is surrounded by the North Atlantic Ocean. The Island of Ireland is divided into Northern Ireland (not part of the European Union (EU)) and the Republic of Ireland (part of the EU). This report focuses on the Republic of Ireland, written as Ireland hereafter. Ireland is governed as a unitary parliamentary republic from Dublin. Dublin, Cork, Galway and Limerick are the larger cities. Roughly half of the population lives in the larger cities and satellite urban towns and one third lives in independent urban towns or rural areas with high urban influence. About one fifth of the population lives in (remote) rural areas (CSO, 2019).

In 2023, the Irish population stood at around 5.3 million people, growing with 2.7%, with projections indicating a small increase until 2050 after which the population will shrink again, due to a shrinking working-age population and a growing elderly demographic (see **Table 2**). The population distribution is relatively similar among men and women.

	2021	2022	2023
Total population	5,003,164	5,526,700	5,307,600
Population growth (annual %)	1	2.6	2.7
Population ages 0-14 (% of total)	20	19	19
Population ages 15-64 (% of total)	65	65	65
Population ages 65 and above (% of total)	15	15	16

*Table 2: Population statistics for Ireland (The World Bank, 2022).*

The Irish healthcare system is a two-tier system composed of both strong public and private sectors. On the public side, the hospital system is managed by the Health Service Executive (HSE), an executive body of the Department of Health (DoH). The HSE operates both its own hospitals and those contracted from external providers, commonly known as voluntary hospitals. These voluntary hospitals typically have historical ties to charitable or faith-based organisations. While owned by these charitable entities, they are contracted and funded by the HSE to provide healthcare services. Budget deficits of voluntary hospitals tend to be covered by donations. Some of the voluntary hospital groups also have private hospitals (BusinessIreland, 2024).

Private hospitals, which are owned by health insurers or private companies, play a complementary role in Ireland's healthcare system. The HSE contracts private hospitals to expand capacity, particularly during peak periods such as the winter months when healthcare demand rises. This collaboration helps to manage patient flow and reduce pressure on public hospitals. Many patients turn to private healthcare providers not only to shorten waiting times for treatment but also due to staffing shortages in the public system, which can impact service availability and efficiency (BusinessIreland, 2024).

In order to access hospital care, patients are generally required to visit a general practitioner (GP) first for an initial consultation and referral. If a patient is directly admitted to a hospital without a referral, they are typically required to pay a fee to discourage unnecessary use of healthcare facilities. Emergency care is an exemption and doesn't necessarily require the involvement of a GP (Medical Careers, n.d.). Private patients in public hospitals are generally required to pay for their treatment, including accommodation charges and consultant fees. However, whether they are reimbursed depends on their private health insurance policy (Health Service Executive, n.d.).

Long-term care in Ireland is provided through homecare services and nursing home organisations. In line with practices in many other countries, the Irish government prioritizes supporting people in their own

homes for as long as possible to reduce the strain on nursing homes and long-term care facilities (World Health Organization, 2024).

## 2.2. Trends & Developments

In 2021, Ireland's life expectancy was 80 years for men and 83 years for women, which is above the European average (Institute for Health Metrics and Evaluation, 2021). However, the Irish healthcare system faces significant challenges. The population is ageing rapidly, which is expected to place increased pressure on the healthcare sector, especially given the growing need for long-term care services. The top ten causes of deaths in Ireland can be found in Annex 1. Ireland's healthcare system struggles with long waiting lists, and the quality of services, particularly in comparison to other Western European countries, remains below expectations. Staffing shortages exacerbate these issues, as the healthcare sector competes with other industries offering higher wages. This has led to a reliance on foreign staff, many of whom transition from the private to the public healthcare sector, contributing to high turnover rates and increasing training and education costs (O'Donovan, 2024).

In response to these challenges, Ireland's healthcare policy is shifting towards decentralized, community-based care, allowing individuals to remain in their homes longer. The transition of Ireland shifting healthcare from hospitals into community-based settings, driven by the high costs of hospital care, encourages the expansion of primary care centres and the integration of electronic health records (EHRs). The private sector is already responding with services like diagnostics, walk-in screening, primary care clinics, and fee-for-service providers such as SouthDoc (2016) and Webdoctor (2025). These initiatives aim to alleviate the burden on Ireland's expensive secondary care system, offering more accessible and cost-effective healthcare options, particularly in rural areas (KPMG, 2024a). Despite this focus, the healthcare system still faces significant obstacles, including limited resources and insufficient capacity to meet demand. The need for improvements in care quality and staff efficiency remains a priority, as Ireland continues to invest in innovations to address these systemic shortcomings (PwC, 2023).

## 2.3 Government Strategy & Policies

For Dutch companies in the LSH sector looking to expand into Ireland, understanding the current government strategies and policies is crucial for aligning with Ireland's healthcare transformation and seizing opportunities in the market. First, the DoH (2021) and HSE are collaborating to deliver Sláintecare, a reform program focused on universal healthcare, putting people at the center of the system. By prioritizing primary and community care, Sláintecare aims to provide accessible, need-based services closer to home and transform health and social care to ensure timely, appropriate care.

### Connected Health

Ireland's approach to connected health has evolved over the years, with steps taken since 2009 to implement and invest in connected healthcare solutions (Department of Health, 2013). While the pace has been slow at times, the country is now taking more concrete actions with clear strategies and substantial investment to modernize and digitalize its healthcare system.

*The Sláintecare 2023 Action Plan* emphasizes the development and implementation of connected health solutions, with a focus on investing in connected health, EHRs, and cyber resilience to reform the health service. Key initiatives include the publication of the *Digital Health Strategic Framework 2023-2030*, progressing EHRs for Community programme (ICCMS), and mobilizing the Shared Care record programme, aimed at enhancing the integration of health information systems across Ireland. In the context of Healthy Ageing, the plan supports the expansion of primary and community care services, particularly for older populations, through the Enhanced Community Care (ECC) programme. This approach integrates healthcare with the acute hospital sector, enabling people to stay healthy at home while reducing hospital strain. Additionally, the plan prioritizes MedTech innovations, with funding for initiatives like the Sláintecare Integration Innovation Fund



(SIIF), testing new care pathways and connected health solutions to further enhance the quality of healthcare services.

Ireland's digital health strategy is shaped by the *Digital for Care Framework* (2024-2030) and the *HSE Digital Health Roadmap* (Department of Health, 2024), building on the 2013 *eHealth strategy*. These initiatives aim to create secure, connected, and efficient health services by 2030, with a strong focus on improving health outcomes. Key actions include increasing access to personalized EHRs, allowing individuals to manage their health more effectively and providing healthcare professionals with real-time patient information to ensure better continuity of care. The integration of health data across hospitals, general practitioners, and community care is a central component, supported by programs like ICCMS, which aims to implement EHRs in local communities. Additionally, the strategy promotes secure data sharing and the use of remote care solutions to reduce hospital visits. Developed through extensive consultation with patients, healthcare professionals, and industry stakeholders, this framework aligns with the new HSE Health Regions (2024) and guides connected health investments for the next decade. The *HSE Digital Health Roadmap* (Transformation and Technology, 2024) details the steps needed to implement this vision, including building robust digital infrastructure, ensuring interoperability between healthcare providers, and preparing the workforce with digital tools and training. It also highlights the importance of data-driven decision-making, using advanced analytics and Artificial Intelligence (AI) to improve healthcare planning and patient care. The roadmap emphasizes governance and continuous evaluation to ensure that Ireland's healthcare system evolves into a digitally integrated model by 2030.

## MedTech

While Ireland has not yet established a national MedTech strategy, it is actively supporting the growth of its MedTech sector. A national health technology strategy is expected to be set up, led by the Department of Enterprise, Trade and Employment, and will drive industrial policies that foster clustering and enhance strategic cross-sectoral cooperation in Ireland (Ó Faoláin, 2024).

The Irish Medtech Association (IMA) (n.d.), part of Ibec, representing over 250 MedTech companies, did set up a *MedTech strategy* for the Irish healthcare sector. They support industry growth through policy advocacy, collaboration, and workforce development. It drives innovation and investment, positioning Ireland as a global MedTech hub. As The Irish Medtech Strategy 2025 (Irish Medtech Association, 2025) is designed to strengthen Ireland's position as a global leader in MedTech innovation. The strategy addresses emerging trends such as AI-driven healthcare, connected health integration, and sustainability while tackling industry challenges like regulatory shifts, talent shortages, and global competition. By leveraging collaboration, innovation, and investment, the strategy aims to enhance Ireland's competitiveness and ensure long-term growth in the MedTech sector.

To achieve these objectives, the strategy is built around four key pillars: innovation with impact, talent to thrive, competitiveness of the ecosystem, and excellence through collaboration. These pillars emphasize expanding R&D, fostering global partnerships, attracting top-tier talent, and developing a robust regulatory and business environment.

## Healthy Ageing

In 2013, the "*Healthy Ireland*" (HI) framework was created to promote lifelong well-being, prioritize illness prevention, and reduce health inequalities. Key results include a reduction in smoking rates, with the number of smokers dropping from 28% in 2015 to 22% in 2020. There has also been an increase in physical activity, with over 60% of adults now meeting the recommended physical activity guidelines. The framework has improved mental health awareness, with initiatives like "My Mind" expanding access to mental health services. Additionally, there has been a focus on healthy eating, particularly through campaigns like "Food Dudes", which have influenced positive dietary changes, especially among children. Overseen by the Sláintecare Programme, the HI framework drives health improvements such as expanded primary care services and healthier environments. The HI Strategic Action Plan 2021-2025 builds on these initiatives, emphasizing collaboration across sectors to promote good health, ensure access to services, and build

resilience, offering tangible opportunities for Dutch companies in health and wellness sectors to engage in Ireland's evolving healthcare landscape (Department of Health, 2024).

Complementing this, the National Positive Ageing Strategy (Department of Health, 2020) provides a high-level framework detailing Ireland's vision for ageing and older people. It sets national goals and objectives to promote positive ageing, serving as a blueprint for age-related policy and service delivery across the government. This strategy underscores a holistic, whole-of-government approach to changing attitudes towards ageing, focusing on a life course perspective.

## 2.4 Insurance System

Ireland's healthcare system is a mix of public and private services, offering universal healthcare funded primarily through taxation. The public healthcare system is providing a broad range of services such as hospital treatment, GP visits, and emergency care, often with little or no cost to residents. Certain groups, such as those with low income or specific medical conditions, are eligible for Medical Cards, which cover most health services free of charge. Additionally, those who do not qualify for a Medical Card but meet income criteria can receive a GP Visit Card, which covers GP consultations. Despite the availability of these public services, waiting times for non-emergency treatments can be lengthy, prompting many individuals to seek private healthcare for faster service (Health Service Executive, 2024a).

The private healthcare sector in Ireland is well-developed, offering individuals the option to purchase private health insurance, which allows for quicker access to care, private hospital rooms, and elective treatments not covered by the public system. Several insurance providers, such as VHI Healthcare, Laya Healthcare, and Irish Life Health, offer different plans to cater to varying needs. Private health insurance premiums may be eligible for tax relief, providing some financial relief to those opting for private care (Health Service Executive, 2024a). This hybrid system, where both public and private healthcare coexist, creates opportunities for LSH companies to engage in the Irish market by offering solutions that address the challenges in both sectors, including reducing waiting times and improving access to care.

## 2.5 Regional Differences

Ireland's healthcare landscape is undergoing transformation through the *HSE New Health Regions 2024* initiative, which promotes decentralized decision-making and localized healthcare delivery (Department of Health, 2023). By empowering six local regions with the autonomy to tailor healthcare services to specific regional needs, the initiative emphasizes population-based service planning, aiming to enhance patient outcomes and ensure healthcare systems are more responsive to local challenges. This approach encourages collaboration among healthcare providers, industry leaders, and academic institutions, fostering innovation and driving economic growth within the healthcare sector. It also supports the integration of community and acute care services, bringing healthcare closer to home while improving governance, access, and patient experiences.

The initiative capitalizes on Ireland's regional strengths, establishing distinct hubs that contribute to global healthcare innovation. Dublin is positioned as Ireland's connected health hub, focusing on telemedicine, AI-driven diagnostics, and EHRs, thus driving connected health solutions and collaborations within the health-tech ecosystem. Galway serves as the MedTech center, advancing chronic disease management and medical devices through research and industry partnerships. Cork is recognized as a pharmaceutical hub, crucial in drug manufacturing, biotechnology, and clinical trials, with a focus on therapeutics and personalized medicine. Meanwhile, Dundalk is emerging as a leader in healthy aging and connected health technologies, particularly in geriatric care and AI-driven elderly care solutions. These regional hubs foster a dynamic environment for tailored solutions in connected health, MedTech, and healthy ageing, creating new opportunities for innovation and strategic advantages in the global market.

The implementation of healthcare solutions across urban and rural areas presents unique challenges and opportunities. Urban centers benefit from advanced infrastructure, a higher concentration of healthcare professionals, and well-equipped hospitals, which facilitate the swift integration of new technologies, connected health solutions, and specialized care. Conversely, rural areas face limitations such as fewer healthcare facilities, a smaller workforce, and greater distances between patients and providers. To bridge this gap, rural regions often rely on innovative models like telemedicine, mobile health units, and remote monitoring technologies, addressing geographical barriers and ensuring accessible healthcare. However, lower digital literacy and limited familiarity with new technologies in rural areas necessitate focused training, capacity building, and community-based approaches to support digital adoption.

Successful implementation in both urban and rural settings require strong local collaboration and tailored approaches to ensure health equity across the country. By leveraging regional strengths and addressing the rural-urban divide, Ireland's healthcare system can achieve a more integrated and responsive framework, enhancing healthcare delivery both locally and globally (Department of Health, 2023).

## 2.6 Main Stakeholders

Key stakeholders in Ireland's healthcare system include the DoH and HSE for policy and public health services, with regulation by the Health Products Regulatory Authority (HPRA). Academic institutions, research centres, and public, private, and voluntary healthcare providers contribute to healthcare delivery and innovation.

In Connected Health, MedTech, and Healthy Ageing the organisations Enterprise Ireland, Health Innovation Hub Ireland (HIHI), and IMA drive business growth and innovation. Facilitating collaboration among academia, business innovation centres, and voluntary organisations supports digital health advancements and solutions for healthy ageing. Furthermore, there are many Connected health, MedTech and Healthy Ageing companies that have a presence in Ireland. These companies could serve as potential partners for Dutch LSH companies entering the Irish market. Find the full list of stakeholders including a description and links in Annex 2: Main stakeholders in Ireland.

### **Micro-Cosmos: Leveraging HIHI for successful market expansion**

**Micro-Cosmos** entered the Irish market through a contract with HIHI via the Bridgehead program of the European Commission, which provided subsidies and key local connections. They conducted successful pilot projects in Galway hospitals and nursing homes and are now scaling up, looking for distributors. The ageing population and focus on healthcare make Ireland a strong fit for their product. While facing challenges in financing and navigating the private/public sector complexities, Micro-Cosmos advises Dutch companies to utilize HIHI, network with distributors, and build relationships to succeed in the market. Their strategy focuses on scaling up and leveraging local innovation networks.

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## 3. OPPORTUNITIES FOR DUTCH ORGANISATIONS

### 3.1. Introduction

Ireland has a growing reputation as a hub for innovation in Connected Health, MedTech, and Healthy Ageing, driven by a dynamic ecosystem of innovation, skilled professionals, and strong government support (De Barros, 2025). The country's connected health landscape benefits from advancements in telemedicine, digital diagnostics, and health data analytics, while the MedTech sector is strengthened by world-renowned MNCs. However, challenges such as fragmented care systems, workforce shortages, and regulatory hurdles remain. This section explores Ireland's strengths and weaknesses across these sectors, highlighting the opportunities for Dutch companies to contribute to the ongoing evolution of Ireland's healthcare landscape. By addressing key challenges and aligning with Ireland's strategic frameworks, Dutch companies can play a pivotal role in advancing Connected Health, MedTech, and Healthy Ageing solutions. Annex 5 shows figures with summaries of the strengths and weaknesses and the opportunities in the Irish LSH market.

### 3.2. Connected Health

#### Strengths & Weaknesses

Ireland has developed a strong foundation in Connected health, supported by a vibrant innovation ecosystem. Universities like the University of Galway and Trinity College Dublin are actively engaged in Connected health research, while global technology giants such as IBM (IBM, n.d.) and Microsoft (Microsoft Ireland, 2021) contribute to the country's capabilities in telemedicine, digital diagnostics, and health data analytics. Additionally, Ireland benefits from a skilled workforce in Health information technology (HIT), data science, and connected health management, fostering the growth of digital solutions and health-tech start-ups.

However, despite these strengths, significant challenges remain. The Irish healthcare system lags behind Western European standards (OECD & European Observatory, 2019), contrasting sharply with the country's well-developed LSH industry driven by foreign investment. While Ireland hosts some of the world's largest MedTech companies, like Medtronic, Abbott, and Johnson & Johnson (IDA Ireland, 2023a), its domestic healthcare sector remains underdeveloped. This imbalance presents opportunities for Dutch companies, either as suppliers or collaboration partners to international manufacturers or as providers of products and services tailored to the Irish healthcare market.

Another major challenge is the fragmentation of Connected health solutions across various healthcare providers, which hinders interoperability and limits the full potential of digital technologies. The slow procurement process of the HSE, which often relies on external consultants, further delays the adoption of innovative digital solutions, resulting in disconnected IT systems (Health Service Executive, 2024b). Additionally, companies entering the Irish market must navigate strict regulatory and compliance issues, including EU privacy laws such as the General Data Protection Regulation (GDPR) and stringent cybersecurity requirements.

One notable effort to address these challenges is the pilot EHR system serving 15,000 patients across South Dublin and West Wicklow (Mindó, 2024). This cloud-based, open-source system enhances real-time access to patient information, reducing medication errors, and improving data integration. Government initiatives such as the *New Digital for Care Framework* (Department of Health, 2024) and the *HSE's Roadmap* (Technology and Transformation, 2024) aim to support the adoption of integrated care systems and EHRs to enhance healthcare delivery.



While many promising connected health solutions are emerging, scalability and integration remain obstacles. Most innovations are still in pilot phases, and their lack of integration with existing infrastructure limits wider application. Overcoming these issues will be key to realizing the full benefits of connected health across Ireland's healthcare system.

## Opportunities in the Connected Health sector

Ireland's connected health sector is rapidly evolving, presenting opportunities for Dutch companies, especially in areas identified by the IMA (IBEC, n.d.) and aligned with the *HSE's Digital for Care framework* (Department of Health, 2024). Key growth areas include connected medical devices, remote patient monitoring, and health IT infrastructure.

Connected medical devices are in high demand, as Ireland's healthcare system adopts more wearable and wireless devices for chronic disease management and preventative healthcare. Dutch companies with expertise in Internet of Things (IoT), sensor technology, and biometric monitoring can find a growing market in Ireland. Similarly, the rise of remote patient monitoring and telehealth presents major opportunities. As telemedicine adoption increases, Irish healthcare providers seek solutions to facilitate virtual care, medication adherence, and patient engagement. This shift towards telehealth is exemplified by private providers such as Allview Healthcare and Webdoctor (2025), who already embrace telemedicine technologies. The pandemic has significantly boosted patient engagement, further emphasizing the potential for connected health solutions in Ireland (KPMG, 2024a). Dutch companies specializing in telehealth and remote monitoring technologies can collaborate with Irish providers to improve healthcare accessibility, especially in rural areas.

Mobile health applications and virtual consultations are gaining traction, particularly in urban areas. However, rural regions still face challenges like limited broadband and lower digital literacy. COVID-19 has accelerated telemedicine adoption, with both public and private sectors embracing virtual consultations (The Growth Catalysts Team, 2024a). The Irish government is investing in rural broadband and telehealth to ensure equitable access to these technologies (Jahn et al., 2021). In the private sector, the adoption of connected health solutions like EHRs, telemedicine, and cloud-based platforms has improved service delivery, with hospitals like Beacon Hospital and St. James's Hospital leading the way (Newenham, 2015; St. James, 2020).

As healthcare demand increases in Ireland, driven by an aging population and rising multimorbidity, Dutch companies have an opportunity to enhance service delivery and support the workforce by offering solutions that streamline administrative tasks, improve access to real-time data, and enable collaboration. This aligns with Ireland's *HSE Digital Roadmap* (Technology and Transformation, 2024), which emphasizes connected health to improve care, streamline processes, and enable data sharing. Additionally, maximizing workforce efficiency through models like First Contact Practitioners (FCPs) for physiotherapists, redirecting some GP consultations to pharmacists, and expanding the use of Advanced Nurse Practitioners (ANPs) could alleviate pressure on GPs (KPMG, 2024a). To achieve these goals, both public and private sectors will need significant investment, with longer-term contracts providing stability to support workforce expansion and the integration of innovative technologies.

HIT is also a key focus, with increasing demand for EHRs, electronic prescribing systems, and secure digital platforms. Dutch companies with expertise in software development, data management, and secure connected health solutions are well-positioned to support Ireland's digital transformation. The need for interoperable systems to manage patient data and improve outcomes is critical, and Dutch expertise in data analytics, cybersecurity, and AI-driven solutions can help meet these needs (Murray, 2018).

Finally, technology infrastructure, such as cloud services and IoT solutions, form the backbone of connected health. Dutch companies with experience in providing Information and Communication Technology (ICT) services and HIT infrastructure can help build the necessary foundation for Ireland's connected health ecosystem, as shown within the government-led connected health initiatives.

In conclusion, the most promising opportunities for Dutch companies in Ireland's connected health sector lie in connected medical devices, remote monitoring, health IT, data analytics, cybersecurity, and infrastructure (see Annex 3). By aligning with Ireland's Digital for Care framework, Dutch companies can

contribute to the country's connected health evolution, improving care delivery, patient empowerment, and addressing healthcare challenges.

### 3.3. MedTech

#### Strengths & Weaknesses

Ireland is a leading global exporter of MedTech, ranking as the second largest in Europe and supplying devices to 95 of the top 100 countries by Gross Domestic Product (GDP) (IDA Ireland, n.d.). This strong export capability is supported by a mature MedTech ecosystem, which fosters collaboration among industry leaders, academic institutions, clinical research groups, and government agencies. Additionally, Ireland has a highly skilled workforce of over 50,000 professionals, driving growth and maintaining international competitiveness. Major MNCs like Medtronic, Boston Scientific, and Abbott have established significant operations in Ireland, further solidifying its status as a global hub.

Despite its manufacturing strength, Ireland's MedTech sector faces challenges due to its historical dependence on manufacturing led by MNCs (University of Galway, n.d.). This focus has limited diversification into R&D and high-impact innovation. Additionally, emerging MedTech companies struggle with funding, relying heavily on angel investors due to limited institutional investment options (The Times, 2023). This hinders growth and scalability, posing risks to the sustainability of innovative start-ups. The ongoing supply/demand mismatch in healthcare across Ireland is unlikely to be resolved in the near future, presenting an opportunity for strong return-on-investment in areas that enhance healthcare delivery or use innovative approaches to address inefficiencies within the market (KPMG, 2024a).

Another significant challenge is the complex regulatory landscape. Navigating the EU's Medical Device Regulation (MDR) and In Vitro Diagnostic Regulation (IVDR), which apply across the entire EU, requires extensive time and resources, which can be particularly burdensome for start-ups (MedTech Europe, 2025). However, due to the long and complex approval process in the EU, many start-ups look toward the United States (US) Food and Drug Administration (FDA) pathway as an alternative, as it may offer a faster route to market. This environment emphasizes the need for strategic partnerships and mentorship to help new companies comply with stringent regulations and bring products to market efficiently.

To support the digital shift, Ireland needs to address its skills gap in connected health, data science, and systems integration. While the country has a skilled workforce, the growing demand for experts outpaces supply, particularly in rural areas. Strategic investments in education, training, and international recruitment will be essential for sustaining growth in MedTech.

International collaboration presents an opportunity for Ireland's MedTech sector. Dutch companies, known for digital therapeutics and AI-driven diagnostics, can complement Ireland's manufacturing strengths and growing connected health ecosystem. Strategic partnerships, joint ventures, and knowledge exchange programs could enhance innovation and expand market reach for both countries.

In conclusion, Ireland's MedTech sector is at a critical juncture, balancing its manufacturing leadership with the need for enhanced R&D and digital transformation. By addressing challenges in funding, regulatory compliance, and skills development, Ireland can sustain its global leadership. Strategic international collaborations, particularly with the Netherlands, will further drive innovation and ensure long-term competitiveness in the evolving MedTech landscape.

#### Opportunities within the MedTech sector

The Irish MedTech sector presents a growth opportunity for Dutch companies, particularly due to its mature ecosystem and strong export capability (Barron, 2022). By strategically aligning their offerings with Ireland's seven key MedTech categories based on IMA – Diagnostic, Ophthalmic, Vascular/Endovascular, Orthopaedic, Hospital/Homecare, Neurology, and Service – Dutch companies can effectively expand into the Irish market. The following business models outline how Dutch innovations can meet Irish demands and complement Ireland's manufacturing-focused MedTech landscape.

Dutch companies specializing in diagnostic equipment can leverage Ireland's demand for advanced, high-precision tools for disease detection and monitoring. Given Ireland's robust manufacturing base and its global reputation in MedTech exports, there is also strong potential for partnerships between Dutch knowledge institutions and Irish companies. Although Ireland has a sophisticated production environment, it has been slower to diversify into upstream R&D and innovation, creating space for Dutch companies to contribute advanced diagnostic platforms such as molecular testing technologies or portable imaging systems. Collaboration with Irish hospitals and clinics, for instance through validation trials or joint ventures, would support the integration of these innovations. An example includes portable MRI systems that can be deployed in outpatient settings to expand access to neurodiagnostic services.

The treatment of vascular diseases is a national priority in Ireland (O'Keeffe, 2023), and Dutch MedTech firms can bring to market novel catheter technologies, embolization devices, and bioresorbable vascular scaffolds. These innovations address the growing need for minimally invasive interventions. Joint R&D initiatives with Irish universities such as the University of Galway (n.d.) could enable testing and refinement within clinical settings. Ireland's current emphasis on manufacturing over innovation in this area gives Dutch companies room to introduce first-in-class technologies. For example, the development of drug-coated balloons with precision delivery systems for peripheral artery disease could significantly improve treatment outcomes.

#### **University of Galway's Innovation and Commercialization Hub**

**The Research & Innovation Centre** at the University of Galway offers valuable support for Dutch companies in the LSH sector looking to enter the Irish market. With a focus on MedTech, health tech, and connected health, the centre provides bespoke assistance for start-ups, spin-outs, and early-stage companies through innovation programs, funding options, and access to industry networks. Their commercialization team helps validate technologies, secure industry collaborations, and scale innovations, especially in chronic disease management, biomedical engineering, and cancer therapy. The university works closely with regional and EU partners, such as the HIHI, to facilitate clinical trials, regulatory approvals, and industry partnerships. Additionally, programs like the Innovation Partnership Programme and Commercialisation Fund offer match funding opportunities, making Galway an ideal location for companies to scale and access cutting-edge research and clinical expertise.

In the ophthalmic and orthopaedic domains, Dutch companies can introduce advanced technologies aligned with Ireland's clinical priorities. High-resolution imaging systems, intraocular lenses, and retinal implants offer solutions for age-related macular degeneration and diabetic retinopathy, both prevalent in Ireland (Irish College of Ophthalmologists, 2021). In orthopaedics, innovations such as 3D-printed implants and motion-sensing rehabilitation devices support the shift toward personalized care. Dutch firms can contribute to Ireland's MedTech clusters, similar to how Loci Orthopaedics collaborates with NUI Galway on additive manufacturing (IDA Ireland, 2023b). The demand for neurology solutions also presents a strong entry point. Dutch companies can contribute neurostimulation devices, seizure monitoring tools, and robotic-assisted rehabilitation technologies that support both hospital and outpatient care. These tools align with Irish efforts to manage neurodegenerative diseases and epilepsy, following the example of Medtronic's DBS therapy and research from FutureNeuro at RCSI (Medtronic, n.d.).

The hospital/homecare and service categories further strengthen the case for Dutch-Irish collaboration. SMEs from the Netherlands can supply ergonomic, efficient devices like infusion pumps, wound care systems, and portable ventilators that support both acute and long-term care. These offerings align with existing solutions in Ireland, such as the Trilogy 100 ventilator and the Nisus negative pressure wound therapy system (Cork Medical, n.d.). In the service category, Dutch firms with expertise in logistics, sterilization, and predictive maintenance can optimize clinical operations, mirroring solutions like Medline Ireland's RFID-based inventory tracking (Medline, n.d.). Moreover, Dutch companies specializing in contract manufacturing, R&D

consulting, and IP management can support Ireland's rapidly growing MedTech start-up ecosystem. By providing end-to-end product development services—including regulatory support and lifecycle management—Dutch firms can help accelerate innovation and reduce time-to-market for new devices (Siemens Healthineers, 2021).

#### **Husk Medical, IDE Group & Demcon LSH: Strategies of Dutch medical device developers and manufacturers**

- **Husk Medical** entered the Irish market as part of its international expansion, replicating its successful Dutch model. Focusing on both private hospitals and public tenders, the company offers high-volume, low-complexity products with a commitment to sustainability, aligning with Ireland's carbon-neutral goals. In their experience, the private sector is open to innovation, while the public sector is slower to adopt new technologies due to challenges with digital infrastructure and procurement systems. Husk Medical faces competition from larger distributors but gains an edge with its sustainable product options. Husk advises Dutch companies to enter smaller markets first and adapt to local conditions, while exploring opportunities in digital health and telemedicine.
- **IDE Group** entered the Irish market 1.5 years ago, drawn by its thriving healthcare innovation ecosystem and strong collaborative networks. Since then, the company has partnered with award-winning start-ups that led to collaborations back in the Netherlands, e.g., with studies at the Amsterdam UMC. At the same time, actively engaging with MNCs, research institutes and platforms such as BioInnovate and Enterprise Ireland. With a focus on MedTech and deep expertise in areas like women's health, respiratory care, radiotherapy, point of care (POC) diagnostics, and connected surgical devices, IDE Group has seen particular momentum in Ireland's growing Female Technology (FemTech) and wearables space - positioning itself as a key player in next-generation healthcare solutions.
- **Demcon LSH** is expanding into the Irish market by collaborating with start-ups in endoscopy and product development, leveraging local networks like Enterprise Ireland and BioInnovate Ireland. They recommend Dutch companies entering Ireland to connect with innovation hubs and use local support from organisations like IDA Ireland for successful market entry and collaboration.

By adopting these tailored business models, Dutch MedTech companies can effectively expand into the Irish market, leveraging their innovative solutions to address specific healthcare needs while contributing to the growth and transformation of Ireland's MedTech sector (see Annex 3).

### **3.4. Healthy Ageing**

#### **Strengths & Weaknesses**

Ireland has made strides in the healthy ageing sector, supported by a robust healthcare infrastructure and a growing emphasis on community-based care. However, challenges persist, particularly in scaling innovations and integrating them into the public healthcare system. The number of adults aged 65 years and over is increasing by 4-5% each year, with a 22% increase since 2016 (Health Manager, 2022). This demographic shift exacerbates existing gaps in long-term care facilities and contributes to workforce shortages, impacting the quality and accessibility of elderly care services.

Ireland demonstrates a supportive environment for elderly care. Its increased regulation for connected health infrastructure facilitates remote monitoring and telemedicine solutions, ensuring better accessibility for older adults in rural areas (Health Service Executive, 2023). Furthermore, Ireland's proactive approach in health promotion and preventive care, backed by public health campaigns, has led to improved health outcomes among the ageing population. Ireland also has a collaborative ecosystem involving academic



institutions, start-ups, and public health bodies, fostering innovation in geriatric care and cognitive health solutions. The National Clinical Programme for Older People (NCPOP) is a key public health initiative focused on integrating elderly care technologies into everyday healthcare practices, aiming to enhance independent living and dignity for older adults (The Growth Catalysts Team, 2024b). Academic institutions such as University College Dublin and Trinity College Dublin are at the forefront of gerontological research, developing innovative approaches to cognitive health. Additionally, start-ups are pioneering digital mental health platforms that offer accessible therapeutic solutions for the elderly. Collaboratively, these entities contribute significantly to the innovation landscape in geriatric care, striving to improve health outcomes and quality of life for Ireland's ageing population.

However, despite these advancements, several weaknesses persist. One major challenge is the fragmented nature of care services, leading to inconsistencies in the quality of elderly care across different regions (OECD, 2022). Providing adequate elderly care in Ireland's rural areas presents difficulties. The dispersed population and limited public transportation infrastructure contribute to social isolation among older adults, making it challenging for them to access healthcare services. Moreover, rural healthcare facilities often face staff shortages, particularly GPs and specialized geriatric professionals (The Times, 2024). The high costs associated with rural living, including expenses for home maintenance and healthcare, further strain the resources of elderly residents (University College Cork, 2022).

Additionally, Ireland faces a general shortage of elderly healthcare professionals, which is further strained by an ageing workforce within the healthcare sector, affecting the delivery of specialized elderly care services, including dementia and palliative care. Moreover, the limited integration of connected health solutions within the public healthcare system hinders the scalability of innovative care models. Finally, there is a growing demand for long-term care facilities, which the current infrastructure struggles to accommodate due to resource constraints and rising operational costs (Health Information and Quality, 2023).

In conclusion, Ireland has made progress in the healthy ageing sector with advanced connected health infrastructure and a strong innovation ecosystem. However, challenges like a growing elderly population, workforce shortages, fragmented care services, and limited digital integration hinder consistent and accessible care. Addressing these issues through strategic investments and international collaborations can enhance Ireland's capacity to meet the needs of its ageing population.

## Opportunities within the Healthy Ageing sector

*The Healthy Ireland Strategic Plan (2021-2025)* emphasizes a proactive approach to health, focusing on enhancing well-being for the ageing demographic through prevention, promotion, and support for ageing with dignity and independence. Key priorities include promoting active retirement, social inclusion, mental health support, and chronic disease prevention, with a focus on self-management and integrated care models to improve healthcare accessibility and efficiency (Arts + Health, 2022). Recent initiatives, such as Community Healthcare Networks and the expansion of the Chronic Disease Management (CDM) Programme, aim to improve accessibility and coordination in elderly care. However, challenges remain, particularly in financial sustainability, workforce shortages, and the slow adoption of innovative solutions.

These gaps present significant opportunities for Dutch companies specializing in connected health, elderly care technology, and integrated care solutions. With Ireland's increasing reliance on public-private partnerships (PPP) and private-sector involvement in assisted living and home care, Dutch firms can contribute expertise in smart healthcare infrastructure, remote monitoring, and innovative care delivery models. Additionally, the HSE's *Healthy Ireland Implementation Plan (2023-2027)* highlights a need for scalable and efficient healthcare solutions, aligning with Dutch strengths in data-driven healthcare and ageing-in-place innovations.

The nursing home sector is facing significant challenges, including rising operational costs, staffing shortages, and insufficient funding from the Fair Deal Scheme, with 31 nursing homes closing since 2019. The Fair Deal Scheme, officially known as the Nursing Homes Support Scheme, is a financial support program in Ireland that helps cover the cost of long-term nursing home care by requiring individuals to contribute a portion of their income and assets, with the HSE paying the balance (Health Service Executive, 2024c). As the

population aged 85 and over is expected to double in the next 20 years, existing business models relying on public funding and direct payments are unsustainable, necessitating innovative solutions for the sector's future viability. Sustainable infrastructure solutions, such as modular construction and energy-efficient nursing home facilities, can provide cost-effective alternatives for expanding capacity and upgrading existing facilities. By leveraging Dutch advancements, Irish nursing homes can improve operational efficiency, enhance care quality, and develop more sustainable business models to support the growing needs of an ageing population (PwC, 2023).

Additionally, Dutch expertise in connected health, integrated care models, and scalable infrastructure can enhance the efficiency and sustainability of Irish nursing homes. Digital platforms and remote monitoring can help reduce staffing pressures, particularly in rural areas with limited access to specialized care. The Netherlands' integrated care systems, which coordinate care across hospitals, communities, and residential facilities, can improve continuity of care and optimize resource allocation in nursing homes. Furthermore, Dutch innovations in cost-effective staffing solutions, such as digital workforce management and flexible staffing models, can alleviate Ireland's staffing shortages and reduce reliance on expensive agency staff.

The use of assistive welfare devices is becoming increasingly important in Ireland as part of the strategy to support ageing-in-place and reduce the strain on traditional care models (Ageing in Place, 2021). Business models in this area include the development and deployment of smart home technologies, remote monitoring solutions, and health tracking devices that enable older adults to live independently for longer. These innovations are integrated into both public and private care offerings, and their growing adoption is transforming how elderly care is delivered. An important development is the move into the digital-first "payvidor" space, where larger private health insurers are exploring models that combine both health insurance and health provision. This trend is likely to yield long-term benefits as healthcare providers respond to the increasing consumerisation of healthcare. Patients, empowered by the growing availability of wellness apps, fitness devices, and online health information, are demanding value-added services like aesthetic treatments, exercise advice, and dietary guidance (KPMG, 2024a). In line with this, healthcare providers are also focusing on improving patient engagement and clinical outcomes through the use of digital tools, such as easy access to information and analytics.

Dutch innovations in elderly care and integrated healthcare offer significant opportunities to address these challenges in Ireland (Philp, 2014). The Netherlands is renowned for its value-based healthcare models that focus on outcomes, efficiency, and cost reduction. By piloting these solutions in collaboration with local stakeholders, Dutch innovations can contribute to sustainable growth and impactful solutions in the sector.

In conclusion, Ireland's ageing population presents opportunities for Dutch companies specializing in integrated care systems, remote monitoring, and smart home technologies (see Annex 3). By leveraging innovative solutions, Dutch businesses can help address Ireland's challenges in elderly care. Collaborating with local stakeholders to pilot these technologies offers a pathway for Dutch companies to contribute to the growth and transformation of Ireland's healthy ageing sector.

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## 4. ROUTE TO MARKET

### 4.1. Introduction

This section provides an overview of potential paths for Dutch companies exploring to enter the LSH market in Ireland. It highlights key opportunities for Dutch entrepreneurs, particularly in the areas of Connected Health, MedTech, and Healthy Ageing, outlining prospects for exporting products, innovations, and services. A list of relevant events, including trade fairs and conferences, offers guidance on engaging with Irish stakeholders. Challenges such as data regulations, legal barriers, and market risks are discussed, along with mitigation strategies. Practical tips on navigating Irish business culture and regulatory environments are provided, along with case studies showcasing successful Dutch market entries illustrating best practices and effective entry strategies.

### 4.2. Business Models

There are several business models to consider for Dutch LSH companies to leverage opportunities in Ireland and expand their presence effectively. One of the most promising strategies for Dutch companies is to form strategic partnerships with Irish healthcare providers, such as hospitals, clinics, and GP networks both in the public and private healthcare sector. For example, joint ventures (JV) and alliances with healthcare organisations and new entrants can provide access to new capabilities, accelerate market entry, and create operational efficiencies (McKinsey & Company, 2022). This model allows Dutch companies to tap into existing local networks, build credibility, and navigate regulatory requirements more efficiently, while offering their expertise in health technology and innovation. Given that healthcare providers are under significant stress due to factors such as the lingering effects of the pandemic, ageing population, staff shortages, inflation, and growing patient demands, Dutch companies should ensure that their solutions alleviate these burdens rather than adding to them (KPMG, 2023a). A key challenge in adopting new technology is maintaining engagement across all staff levels. Without a proper support system, employees may struggle to adapt to new practices, leading to resistance and disengagement. Adequate training and assistance are essential to help staff understand the benefits of transformation and ensure a smoother implementation process (GE Healthcare, 2021). Collaborating with clinical leaders as product champions can help build trust among local providers and facilitate smoother pilot projects, showcasing the value of Dutch technologies. Pilot initiatives can demonstrate the value of Dutch technologies, smoothing scale-up up across Ireland (KPMG, 2023a).

#### **Novuqare's approach via workshop development on the Irish market**

**Novuqare**, a Dutch company, has entered the Irish healthcare market by launching workshops to introduce its product, MAPLe, and connect key stakeholders. These workshops provide hospitals, physiotherapists, and patients with hands-on demonstrations and insights into MAPLe's benefits. Partnering with, for example, Beacon Hospital and the distributor GenaMed, Novuqare has gained valuable market adoption insights and established a strong local presence.

For Dutch companies entering Ireland, Novuqare advises conducting local pilots to build credibility and forming strong networks, as personal relationships are crucial. In their experience, private hospitals make faster decisions compared to public hospitals, making them an ideal starting point. Expanding beyond Dublin to Galway and Limerick, Novuqare engages with key organisations during local conferences to enhance visibility and adoption. By leveraging targeted workshops and partnerships, Dutch companies can accelerate market entry and establish a lasting presence in Ireland.

A second potential model for Dutch companies is engaging in PPPs with the Irish government or local councils. These partnerships allow Dutch firms to work with public health authorities to implement health solutions within the public healthcare system (PwC, n.d.). PPPs combine the strengths of both public entities and private enterprises, leading to accelerated innovation by expediting the development of new healthcare solutions and bringing therapies to market more swiftly (Davey, 2024). PPPs offer opportunities for large-scale contracts, especially in Ireland where the government is invested in improving healthcare infrastructure and connected health services. In addition, PPPs offer enhanced access to funding, with private sector investments supplementing public resources, facilitating the development of infrastructure and services that may otherwise be financially unfeasible (Ferreira & Marques, 2021). An example is the HSE's partnership with companies like IBM and GE Healthcare (GE Healthcare, n.d.a). Annex 5 shows examples of opportunities in the Irish healthcare budget 2025 for PPPs.

Another form of PPP is the creation of Value-Based Partnerships (VBPs), which strengthens market position by fostering long-term, flexible solutions that prioritize patient-centred care through digital innovation and MedTech. By collaborating with industry leaders, Dutch companies can leverage shared expertise to drive growth. VBPs enhance clinical capabilities, workforce development, financial sustainability, and standardized care (GE Healthcare, 2021). Companies like Siemens Healthineers engage in VBPs across Ireland, aligning healthcare strategies (Siemens Healthineers, n.d.). Additionally, organisations like the Irish Platform for Patient's Organisations, Science & Industry (IPPOSI) advocate for integrating patient perspectives into healthcare policies, reinforcing the shift toward value-driven care (IPPOSI, n.d.). IPPOSI plays a key role in integrating patient perspectives into Irish healthcare policies and decision-making. Dutch companies can benefit from engaging with IPPOSI via co-creation and policy and regulation alignment.

Thirdly, Dutch companies can enter the Irish market through licensing and distribution agreements with established firms like Ergo Group and Medtronic Ireland, benefiting from their local networks, regulatory expertise, and market knowledge. This approach minimizes investment risks while enabling Dutch companies to introduce their products efficiently (Shorthose & Baillieu, 2024). Licensing agreements also help sharing financial and operational risks, which is particularly valuable in the LSH sector where R&D costs are significant (Edwards, 2025). By partnering with experienced distributors, Dutch companies can focus on research and innovation while leveraging local expertise in sales, marketing, and compliance. Additionally, these agreements ensure steady revenue streams through royalties and licensing fees, supporting financial stability and reinvestment into further product development (Schuppmann, 2025). Such collaborations allow Dutch companies to efficiently scale their health solutions across Ireland without the need for extensive direct operations.



### Leveraging local distributors for market entry in Ireland

Working with an experienced local distributor is an effective model for Dutch companies entering the Irish healthcare market, ensuring market access, regulatory compliance, and strong local networks.

- **Homecare Medical** specializes in community care and home services, offering distribution and patient management systems, with contracts supporting thousands of patients through HSE. Their expertise in home-based care makes them a valuable partner for companies targeting Ireland's growing ageing population.
- **Bee Healthcare** specializes in providing premium healthcare products, including advanced rollators and other mobility aids designed to enhance quality of life. They leverage industry experience to bridge gaps in acute and community care, focusing on premium healthcare products and service-oriented solutions. Their strong connections with hospitals and procurement networks enhance market penetration.
- **GenAmed** is an Irish healthcare company dedicated to sourcing and supplying innovative medical products that significantly impact patients and clinicians. They provide access to both primary and specialized care, supporting reimbursement processes and bridging hospitals with community services. With a long-standing presence in Ireland, GenAmed ensures a structured approach to market entry, leveraging independent champions and local expertise.

By collaborating with these distributors, Dutch companies can accelerate adoption, demonstrate product effectiveness, and navigate Ireland's complex healthcare landscape efficiently.

Fourthly, Dutch companies can accelerate market entry by engaging in joint R&D ventures with Irish universities or research institutions, leveraging Ireland's strong healthcare research ecosystem (Widjaya, 2024). These partnerships provide access to government grants, cutting-edge innovations, and shared expertise, reducing costs and accelerating product development (McKinsey & Company, 2025). By pooling resources, companies can develop tailored health solutions for the Irish market while benefiting from Ireland's expertise in MedTech and research. For instance, Irish Manufacturing Research has helped companies like APOS (n.d.) adopt digital transformation technologies (KPMG, 2024b). A Dutch company specializing in remote patient monitoring could collaborate with University Hospital Galway, which actively tests telemedicine solutions, demonstrating their effectiveness and encouraging adoption across Irish healthcare systems (CFI, 2022). These collaborations can showcase the effectiveness of Dutch products in improving patient outcomes and reducing hospital admissions. Successful pilots often lead to broader adoption across other Irish hospitals and healthcare systems.

### EITHealth support

**EIT Health** plays an important role in supporting Dutch LSH companies looking to enter the Irish market by providing access to innovation clusters and acceleration programs. With a focus on digital health, healthy aging, and care innovations, EIT Health helps companies scale and deploy their technologies, particularly in public sector settings. They offer matchmaking opportunities, fund proof-of-concept development, and provide guidance on commercialization and reimbursement processes, including support for CE mark and insurance reimbursement for digital health solutions. Their Clinical Entrepreneurship Program also aids clinicians in developing innovative solutions, fostering collaboration between start-ups, industry leaders, and research groups.

Lastly, establishing a direct sales and service presence in Ireland is an effective business model for Dutch companies seeking to expand their health solutions. By setting up a regional office or sales hub, Dutch companies can offer their products and services directly to Irish healthcare providers and end consumers,

enabling greater operational control and fostering closer customer relationships. While this approach requires significant investment in marketing, sales, and operational infrastructure, it also provides access to various financial incentives. Enterprise Ireland, the Irish state agency supporting business development, can offer investment funding and support for foreign start-ups establishing head quarters (HQ) operations in Ireland (Enterprise Ireland, n.d.). Additionally, Ireland provides a competitive corporate tax rate of 12.5%, making it an attractive location for business expansion (Generis Online, n.d.). Various grants and subsidies are also available to support market entry and growth (Business Ireland, n.d.). These factors collectively make Ireland a strategic destination for Dutch companies looking to establish a strong foothold in the LSH sector.

#### **Enterprise Ireland**

**Enterprise Ireland** plays a pivotal role in supporting international start-ups seeking to enter the Irish market. To fully benefit from funding, support, and networking opportunities, companies must establish their HQ in Ireland. Enterprise Ireland offers various funding programs, such as seed investments and commercialization support, and collaborates with research centers, clinical trial institutions, and government departments to streamline regulatory processes and foster innovation. According to Enterprise Ireland, trends in MedTech and Connected Health include growth in connected health, non-invasive devices, and FemTech though challenges like procurement resistance and adoption hurdles remain. Enterprise Ireland also works with MNCs like Roche Diagnostics and offers opportunities for start-ups to showcase their innovations through events like the Start-Up Showcase. Furthermore, an **Innovation Directory** is created that connects global companies, offering opportunities for collaboration and partnerships. Through this platform, companies can engage with innovative organisations and explore potential synergies within the Irish market. Establishing a foothold in Ireland not only strengthens market entry but also demonstrates a commitment to long-term success in the region.

## **Connected Health**

For companies offering software-driven connected health solutions, a subscription-based Software as a Service (SaaS) model is an attractive option in the Irish market. It provides scalable, recurring revenue streams while offering flexible, cloud-based solutions for healthcare organisations. The model shifts costs from upfront investments to manageable operational expenses, making advanced technologies more accessible, especially for smaller Irish facilities (Axtria, n.d.). It also allows for continuous software updates without disruptions, ensuring scalability and efficiency (Sectra, 2020). The subscription model positions companies for broader EU expansion, aligning with the growing demand for cost-effective connected health solutions (Stripe, 2023).

Dutch companies can also enter the Irish market by offering consultancy and advisory services. By guiding healthcare providers in adopting connected health technologies such as telemedicine and AI, Dutch firms can build trust and long-term partnerships, positioning themselves as thought leaders (Global Market Insights, 2023). Additionally, focusing on patient-centered solutions, such as companion apps or digital platforms for chronic disease management, helps Dutch companies tap into the growing Irish wellness market. The rise of platform-based ecosystems in Ireland presents further opportunities for Dutch firms to integrate AI-powered tools to enhance patient engagement and contribute to Ireland's evolving connected healthcare landscape (KPMG, 2023b).

## **MedTech**

In the MedTech subsector, a highly effective model involves partnerships with local healthcare providers. Dutch companies can collaborate with hospitals like St. James's Hospital or Beacon Hospital to introduce advanced MedTech innovations, such as diagnostic imaging systems or robotic surgery technologies. These collaborations can include pilots and clinical trials, providing real-world validation and fostering trust with

healthcare professionals. Establishing partnerships with local providers offers several advantages, including valuable insights into the Irish healthcare system, regulatory requirements, and patient demographics, enabling Dutch MedTech companies to tailor their solutions for greater acceptance and effectiveness (Weitnauer, 2023). Collaborations also provide opportunities for shared resources and cost-sharing in R&D, making the introduction of advanced technologies more feasible (MedTech Pioneers, 2021). By leveraging these partnerships, Dutch MedTech companies can strengthen their market entry strategy, ensuring long-term success in the Irish healthcare sector.

Alternatively, MedTech companies can establish a direct sales and service model by setting up a local office or hiring sales representatives in Ireland. Ireland's favourable business environment, characterized by a competitive corporate tax rate and a supportive infrastructure, further bolsters the attractiveness of establishing a local office (EFM Ireland, 2020). Moreover, the country's highly educated workforce offers a valuable talent pool for MedTech companies (Medical Device and Diagnostic Industry, 2012). This combination of market insight, enhanced credibility, favourable taxation, and access to skilled labour positions Dutch MedTech companies for successful entry and growth in the Irish healthcare sector.

## Healthy Ageing

For the healthy ageing subsector, companies can adopt a subscription-based wellness program model, offering services like physical activity tracking, nutrition plans, and mental wellness programs for the ageing population. This model blends fixed monthly fees with additional charges for extra usage, providing financial stability while maintaining flexibility in service delivery. With Ireland's ageing population expected to grow significantly, this approach addresses the increasing demand for senior health solutions and supports continuous engagement (CBRE, 2023). It also allows companies to manage cash flow efficiently and potentially offer service upgrades at no extra cost (GE Healthcare, n.d.b). Platforms like SilverCloud Health, which provide digital mental health services for older adults, could be key offerings. As the global wellness industry expands, the subscription model will prove to be an effective strategy for Dutch healthy ageing companies entering the Irish market (Ellington Technologies, 2025).

Another potential model involves collaborating with senior living communities and retirement facilities, such as The Village Group or CareChoice, to implement health monitoring devices or remote care solutions. These partnerships can provide real-time health tracking for elderly residents, integrating technology into elderly care services and ensuring effective management of chronic conditions. Collaborating with senior living communities enhances care coordination and communication, ensuring consistent, high-quality services tailored to the needs of older adults (Omni Lifestyle Living, n.d.). Additionally, working with these facilities provides valuable insights into the preferences and needs of seniors, helping companies create services that enhance quality of life (Active Retirement Ireland, 2021). By partnering with retirement communities, Dutch healthy ageing companies can effectively penetrate the Irish market while contributing to the well-being of older adults.

## 4.3. Tendering & Financial support

[The eTenders platform](#) is the official electronic tendering system of the Irish government, managed by the Office of Government Procurement. It serves as a central hub where public sector contracting authorities publish procurement opportunities across various industries, including healthcare. Companies interested in participating in Irish public tenders must first register on the platform, allowing them to access tender documents, submit bids, and receive notifications about new opportunities. In Annex 5 examples of budget allocations within the national strategy is shown for connected health, MedTech and healthy ageing solutions. For more detailed information please visit the government website to download the [Budget of 2025](#) (Department of Health, 2025).

For the LSH sector, DoH regularly posts tenders exceeding €25,000 (excluding Value Added Tax (VAT)) for contracts related to healthcare services, including medical equipment supply, IT infrastructure, and consultancy services. These tenders are open to international companies and provide opportunities for companies to engage with the HSE and other healthcare institutions. To be successful in the bidding process, Dutch LSH companies must meet the specific criteria and requirements outlined in each tender. While partnering with a local Irish organisation is not always mandatory, it can provide advantages such as a better understanding of the local market and regulations, increasing the chances of a successful bid.

Several Irish organisations help companies accessing healthcare tenders and procurement opportunities. HIHI publishes a "[Tender Watch](#)", highlighting MedTech and connected health tenders, providing access to HSE hospitals, though voluntary hospitals may opt out. HealthTech Ireland, the trade association for medical and surgical devices, diagnostics and digital health works closely across the healthcare system nationally, regionally and locally in the public and private system as well as with academia. They have several working groups and offer market intelligence and networking. In collaboration with the Dutch embassy can HealthTech Ireland can facilitate Dutch companies to meet and potentially partner with Irish distributors for hospital tenders. Finally, Enterprise Ireland supports businesses with EU-funded projects, joint tendering, and grants. All three organisations support each other's work. Engaging with these groups helps Dutch companies enter Ireland's healthcare market.

#### Financial Support Organisations for Market Entry in Ireland

1. **Rabobank:** Rabobank can assist Dutch companies entering the Irish LSH market by leveraging its extensive network and knowledge to connect them with key stakeholders, facilitate market entry, and provide financial solutions, including financing for established Dutch companies with Irish subsidiaries as well as for startups and scale-ups.
2. **RVO** (Netherlands Enterprise Agency): Stimulates Dutch organisations in sustainable, innovative, and international business. They can support with subsidies, finding business partners, knowledge and complying with laws and regulations.
3. **Health~Holland:** The Top Sector Life Sciences & Health is one of ten "top sectors" in the Netherlands and part of the Dutch government's Mission-driven Top Sectors and Innovation Policy. It is designated by the Dutch Ministry of Economic Affairs and is selected for their ability to contribute substantially to global societal challenges.
4. **Atradius:** Offers exporters of capital goods, internationally operating contractors, banks, and investors a wide range of insurance and guarantees for risks when doing business abroad. They provide these coverages on behalf of the Dutch government.
5. **Invest International:** Invest International provides capital solutions for organisations and investment funds whose global activities contribute to the realization of the SDG's.
6. **DLL:** Offers financial products and services that enable companies to achieve growth on the international market.

More information on this overview can be found [here](#).

## 4.4. Barriers & Limitations

Entering the Irish LSH market presents various challenges for Dutch companies, particularly in areas such as data regulations, legal barriers, and market risks. These obstacles can be categorized into general challenges for Dutch companies, as well as specific challenges for companies in Connected Health, MedTech, and Healthy Ageing. Understanding and addressing these challenges is crucial to successfully navigating the Irish market.

One of the primary obstacles for Dutch companies is navigating the complex legal and regulatory environment. Data privacy regulations, particularly those aligned with the EU's GDPR, pose significant challenges for companies managing sensitive health data. Additionally, Irish legal requirements for medical devices, pharmaceuticals, and health products are demanding, requiring Dutch companies to adapt their products and services to meet local standards (European Commission, 2020). Market risks, such as competition from Irish companies and well-established global players, also hinder market entry.

Ireland serves as a hub for numerous MNCs within LSH sector (Annex 2), particularly in MedTech. While this concentration creates various opportunities, it also raises the question of whether this dense ecosystem presents significant challenges for smaller Dutch companies attempting to enter and establish themselves within the market. Furthermore, Ireland's favorable corporate tax regime has positioned the country as a highly competitive destination for foreign investment, attracting both MNCs and emerging stakeholders. As a result, Dutch companies may encounter robust competition not only from local Irish enterprises but also from global competitors, including firms from USA, Germany, Switzerland, and the Nordic countries, all of which are investing significantly in MedTech and connected health solutions.

It is essential for Dutch companies to recognize that markets not immediately identified as opportunities may not necessarily be saturated. Specific niches or sub-segments within connected health, MedTech, and healthy ageing may still present substantial growth potential. However, smaller companies may find it strategically advantageous to collaborate or form alliances to strengthen their market positions, particularly in the face of entrenched competition. Collaborating with local stakeholders or participating in PPPs may provide a means to mitigate competitive pressures and enhance market entry prospects.

To address these challenges, Dutch companies should consider forming partnerships with local stakeholders and legal experts to ensure regulatory compliance, while also conducting thorough market research to better understand the competitive landscape and identify potential gaps. Additionally, exploring strategic partnerships or forming clusters within niche sectors could enable Dutch companies to strengthen their market propositions, particularly in areas where they can deliver distinctive value.

Companies in connected health face regulatory uncertainty around digital health and telemedicine. EU regulations, which also apply in Ireland, raise concerns about cybersecurity and data protection due to the transfer of personal health data via connected devices (European Union Agency for Cybersecurity, 2021). Technologies like cloud computing and AI heighten risks to intellectual property (IP) and trade secrets (KPMG, 2024c). Dutch companies should enforce strong access protocols, assess supplier cybersecurity practices, and implement third-party risk management. Collaborating with healthcare providers and staying current on EU and local regulations will facilitate smoother tech adoption.

The Irish MedTech sector is impacted by strict EU regulations like the MDR and IDVR, which complicate and slow product approvals (European Commission, 2021). Reimbursement challenges in Ireland's public healthcare system further affect market entry. Dutch MedTech firms should ensure compliance with EU and Irish requirements, pursue local certifications, and engage stakeholders to navigate reimbursement. Partnering with Irish firms or forming PPPs can help overcome regulatory and financial hurdles (KPMG, 2024c).

Companies in healthy ageing face challenges related to the funding and sustainability of health programs. The Irish healthcare system is under pressure due to an ageing population, which increases demand for services while limiting resources (Health Service Executive, 2020). Dutch companies offering solutions in this sector must design cost-effective, scalable products that align with Ireland's healthcare priorities. Policy and regulatory barriers, such as slow adoption of new technologies in long-term care facilities, can delay the growth of the healthy ageing market. Overcoming these obstacles requires Dutch companies to engage in policy advocacy, form strategic partnerships with local healthcare providers, and demonstrate the long-term cost savings and health benefits of their products.

To successfully overcome these challenges, Dutch companies entering the Irish LSH market are encouraged to understand and comply with local regulations, collaborate with local stakeholders, and address market-specific risks. By leveraging local expertise, conducting comprehensive market analysis, and adapting



their strategies to Ireland's unique healthcare environment, Dutch companies can successfully navigate the Irish market.

## 4.5. Business Climate

When doing business in Ireland as a Dutch LSH company, it is essential to understand and respect the nuances of Irish culture. While the Irish business culture tends to be relatively informal, building a strong personal relationship is critical for fostering sustainable and fruitful partnerships. The Irish approach to business is relationship-oriented, meaning networking and informal meetings are crucial for establishing long-term collaborations. Meetings often begin with informal, personal conversations, where humor and anecdotes are used to make points. Unlike the Dutch, who are generally more formal, the Irish can be more informal in communication and often use first names rather than formal titles. A handshake before and after a meeting is customary, and while business cards may be exchanged, it is not always expected for your Irish counterpart to return one (Rijksdienst voor Ondernemend Nederland, 2019).

In negotiations, the Irish prioritize politeness, so instead of a straightforward "no," you might receive a more nuanced response. Dutch companies should avoid being too blunt or direct in communication, as this could come across as cold. Building trust in Ireland takes time and involves sincerity, prolonged conversations, and a personal connection. Decision-making in Ireland, similar to the Dutch method of consensus decision-making (polder model), often involves multiple stakeholders, which can lengthen the process but ultimately strengthens the relationship. Leaders and decision-makers in Ireland are approachable and should be treated with respect. While the Dutch are punctual and strict with deadlines, the Irish tend to be more flexible and relaxed. Meetings do not always need to take place in office settings; informal locations such as pubs or networking events are commonly used, and attending such events is key to forming strong business ties. Being present at networking events is key, some of the most important events are listed in chapter 4.6.

## Why doing business in Ireland?

As shown in the study, Ireland presents a strong opportunity for business due to its robust LSH ecosystem, with major MNCs establishing R&D and manufacturing operations. The country has a well-connected network of universities, hospitals, associations, and government organisations. While Ireland currently lags in connected health adoption, there is a strong government push to accelerate the use of telehealth and other digital technologies. Additionally, as the only English-speaking country in the EU, Ireland serves as a gateway to both the United Kingdom (UK) and US markets. When contemplating market entry, several key questions should be considered:

- Is the timing suitable for initiating business operations in Ireland?
- How well-acquainted are you with the Irish healthcare market?
- Do you possess an existing network within Ireland?
- Are your expectations realistically aligned with the market?
- Do you require specific resources to penetrate the Irish market?
- How will conducting business in Ireland complement your existing operations?
- Have you accounted for the logistical, legal, financial, and operational aspects involved in establishing a presence in Ireland?
- Are you well-versed in the Irish business climate and cultural nuances?

Careful consideration of these questions will help lay a solid foundation for a successful entry into the Irish market.

## Where to set up your business?

As shown in the study, Ireland's key cities for Dutch LSH organisations are Dublin, Cork, and Galway. Dublin, as the capital, hosts a large portion of the healthcare ecosystem, including hospitals, insurers, policymakers, and universities. Cork focuses on pharma manufacturing and MedTech production, with lower business setup costs and access to universities. Galway is a major MedTech hub in Europe, home to 300+ companies, a strong research community, and a vibrant start-up environment. All are easily accessible by plane from Amsterdam.

### 4.6. Relevant Events

The Irish healthcare market offers various smaller-scale events that provide valuable networking opportunities for Dutch LSH companies. It is essential for companies to identify where key decision-makers and opinion leaders within specific healthcare sub-sectors gather, as these events can facilitate meaningful interactions and potential collaborations.

One major event is the [National Health Summit](#), organized annually by the Business Post in Dublin. Held every February, this summit attracts a wide range of attendees, including policymakers, healthcare providers, homecare organisations, patient groups, and key opinion leaders. Although the event content is high-level, it offers a comprehensive overview of the current challenges within the Irish healthcare system and provides opportunities for networking and building connections with industry stakeholders.

Another key event is the [Private Hospital Association \(PHA\) Annual Conference](#), which gathers influential figures in the healthcare sector to discuss ongoing challenges in patient care, hospital operations, and industry trends. This event presents an excellent opportunity for Dutch companies to engage directly with key leaders and stay informed about the evolving landscape of healthcare in Ireland.

For those focused on the connected health and MedTech sectors, HealthTech Ireland offers multiple events, including their flagship [National HealthTech Symposium](#) with a portion of tickets provided to C-Suite colleagues in the public sector. HealthTech Ireland and HSE now have a National Health Collaboration Council facilitating collaboration and strategic engagement between the HSE and industry on initiatives such as the National AI strategy, the Digital for Care strategy and Green procurement. Additionally, HealthTech Ireland organizes symposia, seminars, and business briefings that offer in-depth insights into the latest innovations, critically the latest developments in the broader healthcare system and government as well as trends within the healthcare technology space. These events are valuable for Dutch companies looking to explore collaboration opportunities with Irish stakeholders in MedTech and Connected Health.

Other notable events include the [PPI Ignite Network](#), which focuses on involving patients and the public in healthcare innovation, and the [MedTech Strategist Innovation Summit](#) in Dublin, which gathers key industry players to discuss cutting-edge advancements in the MedTech sector.

Finally, Dutch companies should be mindful of public holidays in both the Netherlands and Ireland when planning engagements. Both countries share several holidays, including New Year's Day, Good Friday, Easter, and Christmas Day. Additionally, Ireland observes unique public holidays, such as St. Patrick's Day (March 17th) and the first Monday of February, May, June, August, and October. Understanding these dates will help Dutch companies plan their activities and ensure they are aligned with the local business calendar.

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## 5. CONCLUSION AND RECOMMENDATIONS

### 5.1. Irish Healthcare Sector

The Irish healthcare sector is undergoing transformation, driven by government-led initiatives to enhance connected healthcare, an ageing population, and a strong MedTech industry. While Ireland has a well-developed MedTech manufacturing sector, the country faces challenges in connected health adoption, workforce shortages, and increasing healthcare costs. The government's commitment to improving healthcare accessibility and efficiency has led to policy changes that prioritize connected health, telemedicine, and data-driven healthcare solutions. These shifts create a favourable landscape for innovation, particularly in remote patient monitoring, AI-driven diagnostics, and integrated care models.

### 5.2. Opportunities for Future Collaboration

Dutch LSH companies are well-positioned to contribute to Ireland's healthcare evolution. There are clear opportunities in connected health, MedTech, and healthy ageing, particularly in telehealth solutions, smart medical devices, and AI-driven healthcare analytics. Ireland's strong academic and research institutions, coupled with government-backed innovation hubs like HIHI and Enterprise Ireland, offer multiple pathways for Dutch companies to establish collaborations. Additionally, Ireland serves as a strategic gateway to English-speaking markets, including the UK and the US, providing Dutch businesses with broader market access.

### 5.3. Recommendations for Dutch LSH Companies

To successfully enter Ireland's LSH sector, Dutch companies should align with national healthcare priorities, form strategic local partnerships, adhere to regulatory requirements, and consider long-term investments.

- **Align with healthcare priorities:** Focus on areas like Connected Health, MedTech, and Healthy Ageing solutions. These sectors are in high demand in Ireland, where there's a need for telehealth platforms, smart medical devices, and technologies to support an aging population.
- **Build local partnerships:** Partner with key stakeholders such as the HSE, private healthcare providers, research institutions like Trinity College Dublin, and industry associations like HealthTech Ireland. These partnerships help navigate the market, access funding, and improve credibility.
- **Engage in industry events:** Active participation in events like the National Health Summit, HealthTech Ireland activities, and the PHA Annual Conference is essential for visibility and networking, offering opportunities to connect with healthcare leaders and potential clients.
- **Understand regulatory & procurement frameworks:** Ensure compliance with local regulations, including GDPR for data protection and EU medical device standards. Companies should also be prepared to navigate public and private procurement processes to reach the right market segments.
- **Consider long-term investment:** Establishing your HQ or subsidiary in Ireland can strengthen market presence, enhance credibility, and provide better access to procurement opportunities and business growth.

In conclusion, Ireland's changing healthcare sector presents opportunities for Dutch LSH companies to contribute to its transformation. By aligning with national healthcare priorities, building strong local partnerships, and adhering to regulatory frameworks, Dutch companies can effectively navigate the market and drive innovation. The country's growing demand for Connected Health, MedTech, and Healthy Ageing

innovations provides a solid foundation for collaboration. With a strategic focus on long-term investments and active engagement in industry events, Dutch businesses can establish a lasting presence in Ireland and expand their reach into broader international markets.

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# APPENDICES

## Annex 1: Top 10 Causes of Deaths in Ireland

The top 10 causes of the total number of deaths in 2021 compared to 2021 can be found **Figure 1** (Institute for Health Metrics and Evaluation, 2021). The leading risk factors that cause most deaths and disabilities in Ireland are tobacco use, High body-mass index and high blood pressure (Institute for Health Metrics and Evaluation, 2021).

*Figure 1: Top 10 causes of deaths per 100k in 2021 and rate change 2011-2021, all ages combined (Institute for Health metrics and Evaluation, 2021).*

<div> <div></div> Communicable, maternal, neonatal, and nutritional diseases         <div></div> Non-communicable diseases       </div>			
Cause	2011 rank	2021 rank	Change in deaths per 100k, 2011-2021
Ischemic heart disease	1	1	↓ -24.4
COVID-19	-	2	↑ +74.4
Alzheimer's disease	5	3	↑ +8.8
COPD	4	4	↑ +2.5
Lung cancer	3	5	↓ -2.6
Stroke	2	6	↓ -7.6
Colorectal cancer	7	7	↑ +0.3
Lower respiratory infect	6	8	↓ -5.4
Breast cancer	8	9	↓ -1.3
Chronic kidney disease	12	10	↑ +3.3

## Annex 2: Key Stakeholders Ireland

### Generic

Stakeholder	Role/Description	Examples
<a href="#">Department of Health</a>	Government body focuses on investment, healthcare policy development, and strategic direction for the healthcare system in Ireland.	Department of Health (DoH)
<a href="#">Health Service Executive (HSE)</a>	Executing government body responsible for delivering public health services and managing the operation of healthcare facilities. Relevant departments include service delivery, policy, and public health.	HSE (National and Regional Divisions like Technology and Transformation and Procurement)
<a href="#">Health Products Regulatory Authority (HPRA)</a>	Regulates medicines, medical devices, and healthcare products to ensure safety and efficacy in Ireland.	HPRA
<a href="#">Academics (Universities &amp; Academic Hospitals)</a>	Conduct research and development in healthcare, provide education and training for healthcare professionals.	University College Dublin (UCD), Trinity College Dublin (TCD), University of Galway, St. Vincent's University Hospital

<b>Research Centres</b>	Collaborations between academia, industry, and healthcare providers focused on advancing medical research and innovation.	Science Foundation Ireland (SFI) Research Centres like Cúram, Irish Cancer Society Research
<b>Healthcare Providers (Private)</b>	Private sector healthcare organisations offering medical services, including private hospitals, clinics, and GP practices.	Blackrock Clinic, Mater Private Hospital, Beacon Hospital, Private GP practices, Centric Health
<b>Healthcare Providers (Public)</b>	Public healthcare organisations and institutions providing services funded by the government, primarily through the HSE.	Cork University Hospital, University Hospital Galway, University of Dublin, Trinity College Dublin
<b>Healthcare Providers (Voluntary)</b>	Non-profit healthcare providers delivering medical services, contracted by HSE and typically supported by donations or charitable funding.	St. Vincent's University Hospital, St. Michael's Hospital, St. James's Hospital, Tallheigh
<b>Insurance Providers (private)</b>	Health insurance companies offering coverage for medical services, treatments, and healthcare costs.	VHI Healthcare, Laya Healthcare, Irish Life Health

Table 3: Key Stakeholders Ireland: Generic.

#### Specific stakeholders for Connected Health, MedTech and Healthy Ageing sectors

Stakeholder	Sector	Role/Description
<a href="#">Enterprise Ireland</a>	Life sciences, medtech, digital health, and export promotion.	Enterprise Ireland is the Irish government agency that supports the development and international expansion of Irish companies. They provide financial aid, investment, advice, and market development programs to companies working in digital health, medtech, and healthy ageing sectors, facilitating their entry into international markets.
<a href="#">IDA Ireland</a>	Life Sciences, MedTech, engineering.	IDA Ireland supports LSH companies entering the Irish market by providing intensive support, developing relationships with external companies, and offering services like regulatory and policy advice, tax incentives, and assistance with setting up operations. As a government agency, IDA Ireland primarily focuses on MNCs, helping them establish a presence in Ireland and navigate the local landscape through connections with key partners and service providers. IDA Ireland targets companies looking to invest and operate within Ireland, positioning the country as an attractive hub for MNCs in sectors like pharma and medtech.
<a href="#">Health Innovation Hub Ireland (HIHI)</a>	Digital health, medtech, healthcare solutions, and improving healthcare delivery.	HIHI helps companies connect with Ireland's healthcare system to support, test, and scale innovative products and services. Through its collaborations with healthcare providers, it offers companies an opportunity to pilot their solutions and access valuable clinical and market insights, focusing on areas like FemTech, GreenTech and AI in Healthcare.
<a href="#">HealthTech Ireland</a>	HealthTech innovation, advocacy & policy, and networking & collaboration	HealthTech Ireland is an industry association representing companies working in the health technology sector. The organization aims to support the growth and development of Health Tech businesses in Ireland by fostering collaboration, advocating for favourable policies, and providing access to industry resources.

<a href="#"><u>Irish MedTech Association (IMA)</u></a>	Medtech innovation, regulatory compliance, market access, and industry growth.	The IMA is a trade association that represents Ireland's medtech sector. It fosters collaboration between industry stakeholders, offers resources for innovation, and engages with policymakers to shape the regulatory environment. The association supports the sector's growth by providing networking opportunities, information on market trends, and policy advocacy for medtech companies.
<a href="#"><u>eHealth Ireland Technology and Transformation</u></a>	Digital Health, telemedicine, health IT infrastructure, and digital transformation.	eHealth Ireland, a part of the Health Service Executive (HSE), is at the forefront of driving digital transformation in Ireland's public healthcare system. It works on various initiatives to integrate digital health solutions, such as EHRs, digital patient records, and other health IT systems, facilitating collaboration with private industry for large-scale health IT projects.
<a href="#"><u>BiolInnovate Ireland</u></a>	Medical device innovation, technology transfer, and commercialization.	BiolInnovate Ireland is a leading innovation program that collaborates with medical device companies, research institutions, and healthcare providers to develop new medical technologies. It offers a structured approach to innovation, mentorship, and development of new healthcare products.
<a href="#"><u>Connected Health &amp; Wellbeing Cluster</u></a>	Medtech, digital health, healthcare innovation, cross-industry collaboration, and talent development.	The Connected Health & Wellbeing Cluster is a network of organisations based at Dundalk Institute of Technology (DkIT), County Louth, which works to strengthen the healthcare and life sciences sector in the region. It brings together companies involved in medtech, digital health, and related sectors with research institutions, healthcare providers, and regional stakeholders to drive innovation and economic growth. The cluster is supported by local government bodies and development agencies.
<a href="#"><u>Life Sciences Skillnet</u></a>	Skills development, training programs, and talent acquisition in the life sciences and healthcare sectors.	Life Sciences Skillnet is a network supporting the development of talent and skills within the life sciences sector in Ireland. It provides training, funding, and career development opportunities to individuals and organisations in healthcare and life sciences.
<b>Academics &amp; Research Institutions</b> (e.g. <a href="#"><u>Business Innovation Centre</u></a> )	Start-up support, commercialization, research & innovation, and networking & funding.	Academic institutions like the Business Innovation Centre in Galway in Ireland play a pivotal role in advancing research and development in digital health, medtech, and healthy ageing. Universities and research centers partner with companies to conduct clinical trials, develop new technologies, and provide educational resources for healthcare professionals. These collaborations help companies bring evidence-based innovations to market.  The Business Innovation Centre (BIC) at University of Galway supports the growth of innovative start-ups and early-stage companies across various sectors, including healthcare, medtech, and digital health. The BIC offers a range of services to foster entrepreneurship and commercialize new technologies, with a particular focus on supporting businesses in the life sciences and technology sectors.
<a href="#"><u>Healthy Ireland</u></a>	Knowledge collaboration partner on health promotion, public health strategy, community health, and health inequality.	Healthy Ireland is a government initiative that aims to improve the health and well-being of the Irish population. It includes specific strategies to support the ageing population through health promotion and initiatives that encourage healthy living. Companies focusing on healthy ageing can partner with this initiative to align their products and services with national public health goals.



<b>Voluntary &amp; Charitable Organisations</b> (e.g. <a href="#">Age Action</a> , <a href="#">Alzheimer Society of Ireland</a> , and <a href="#">Irish Cancer Society</a> etc)	Healthy Ageing: elderly care, dementia care, cancer care, family support, research funding, prevention education and support services.	Voluntary and charitable organisations focused on ageing advocate for older adults' rights, access to healthcare, and services that improve quality of life. These organisations often collaborate with businesses to provide insights into the needs of the ageing population and to pilot new services or products that support healthy ageing within their extensive network.
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*Table 4: Key Stakeholders Ireland: Specific stakeholders for Connected Health, MedTech and Healthy Ageing sectors*

#### MedTech, Digital Health and Healthy Ageing companies

Company	Sector	Description	Irish Location	Collaboration Opportunities
<a href="#">Medtronic</a>	MedTech	One of the world's largest medical device companies, specializing in cardiovascular, diabetes, and surgical technologies.	Galway	Dutch companies can partner for joint R&D, supply chain solutions, and distribution of medical devices.
<a href="#">Boston Scientific</a>	MedTech	A leading global developer and manufacturer of medical devices for a range of health conditions.	Galway, Clonmel	Dutch companies can collaborate on product development, clinical trials, and market access in Ireland.
<a href="#">Stryker</a>	MedTech	Manufacturer of medical devices and equipment for various sectors, including orthopedics and neurotechnology.	Cork, Limerick	Dutch companies can engage in joint ventures for manufacturing or distribution of orthopedic products.
<a href="#">Abbott</a>	MedTech/Digital Health	Specializes in diagnostics, medical devices, nutrition, and branded generic medicines.	Dublin, Clonmel	Opportunities include collaboration on diagnostic technology, health monitoring systems, and digital health platforms.
<a href="#">Johnson &amp; Johnson</a>	MedTech	A global leader in medical devices, pharmaceuticals, and consumer health products.	Limerick, Cork, Dublin	Dutch companies can explore partnerships in medical devices, digital health solutions, or joint innovation efforts in pharmaceuticals.
<a href="#">GE Healthcare</a>	Digital Health	Provider of medical imaging, monitoring, biomanufacturing, and digital health solutions.	Cork	Dutch companies can collaborate on digital health technologies, data analytics, and imaging solutions.

<a href="#"><u>Philips Healthcare</u></a>	MedTech/Digital Health	Leading provider of diagnostic imaging, healthcare informatics, and consumer health products.	Dublin	Dutch companies can partner on research, product innovation, and integration of digital health solutions.
<a href="#"><u>Fujifilm Diosynth Biotechnologies</u></a>	MedTech/Healthy Ageing	Specializes in biologics, biotechnology, and research into aging-related health issues.	Shannon, County Clare	Opportunities for Dutch biotech companies to collaborate on aging-related research, development of biologics, and clinical trials.
<a href="#"><u>Emeis</u></a>	Healthy Ageing	A European leader in elderly care services, focusing on nursing homes and residential care.	Dublin, Cork	Dutch companies can partner on the development of aging-related health technologies and services, such as remote monitoring and health management systems.

Table 5: Key Stakeholders Ireland: MedTech, Digital Health and Healthy Ageing companies

## Annex 3: Dutch Support Organisations

Government Agencies	Description
<a href="#"><u>Netherlands Embassy in Dublin</u></a>	The Netherlands Embassy in Dublin represents, promotes, and protects the interests of the government of the Netherlands as well as those of Dutch nationals in Ireland. It promotes business in Ireland, assisting Dutch companies looking for market opportunities in Ireland.
<a href="#"><u>Netherlands Enterprise Agency (RVO)</u></a>	The Netherlands Enterprise Agency (RVO) support initiatives that contribute to good health worldwide. They encourage Dutch companies in sustainable, innovative, and international business. With subsidies, finding business partners, knowledge and complying with laws and regulations.
<a href="#"><u>Task Force Health Care (TFHC)</u></a>	Task Force Health Care is a network of Dutch organisations in the Life Sciences & Health (LSH) sector. Its not-for-profit platform supports Dutch companies, NGOs, knowledge institutions, healthcare providers and governments to realize and strengthen their international ambitions in the LSH sector.

Table 6: Dutch Support Organisations

## Annex 4: Examples of Opportunities in the Irish Healthcare Budget 2025

Category	Opportunity Area	Description	Budget Allocation
<b>Connected Health</b>	Digital Health Solutions	Expansion of chronic disease management tools and platforms	€2 million for expansion of GP Chronic Disease Programme
	Telemedicine & Remote Monitoring	Support for virtual outpatient services and follow-ups	Part of €420 million package to reduce waiting lists
	Health Data Analytics	Systems to manage diagnostics and referrals data	Supports 900,000 direct GP diagnostic referrals via package above
<b>MedTech</b>	Hospital Equipment & Infrastructure	Supply of equipment for 335 new acute hospital beds	€49 million for hospital capacity expansion
	Surgical Innovations	Equipment and tech for new surgical hubs in Galway and Swords	€4 million to open 2 new surgical hubs
<b>Healthy Ageing</b>	Home Care Technologies & Services	Assistive technologies, mobility, and home health support	€21.5 million for 24 million home support hours
	Dementia Care Solutions	Diagnostic tools, remote monitoring, and support systems	€2 million for new dementia advisers and services
	Community Health & Preventive Programs	Health promotion in underserved areas	€1.2 million for 4 additional healthy communities

Table 7: Examples of opportunities in the Irish Healthcare Budget 2025 (Department of Health, 2025)

## Annex 5: Strengths & Weaknesses and Opportunities for Dutch Companies in Ireland's Connected Health, MedTech and Healthy Ageing sector

Figure 2: Strengths & Weaknesses of Ireland's Connected Health Sector



Figure 3: Opportunities for Dutch Companies in Ireland's Connected Health Sector

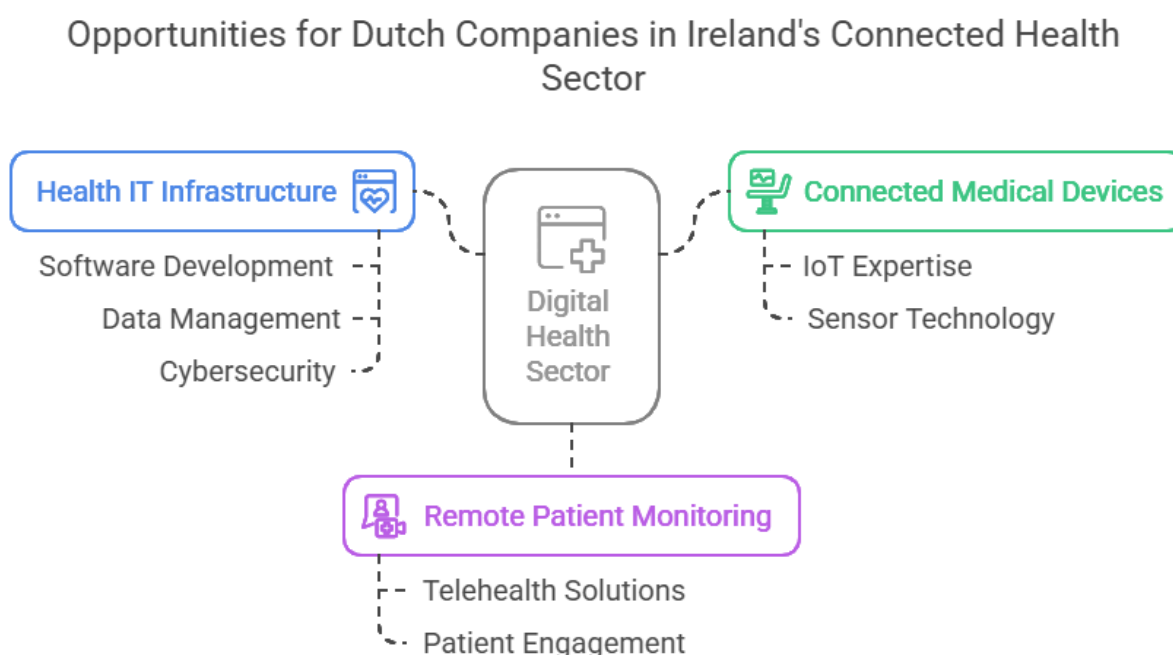


Figure 4: Strengths & Weaknesses of Ireland's MedTech Sector



Figure 5: Opportunities for Dutch Companies in Ireland's MedTech Sector

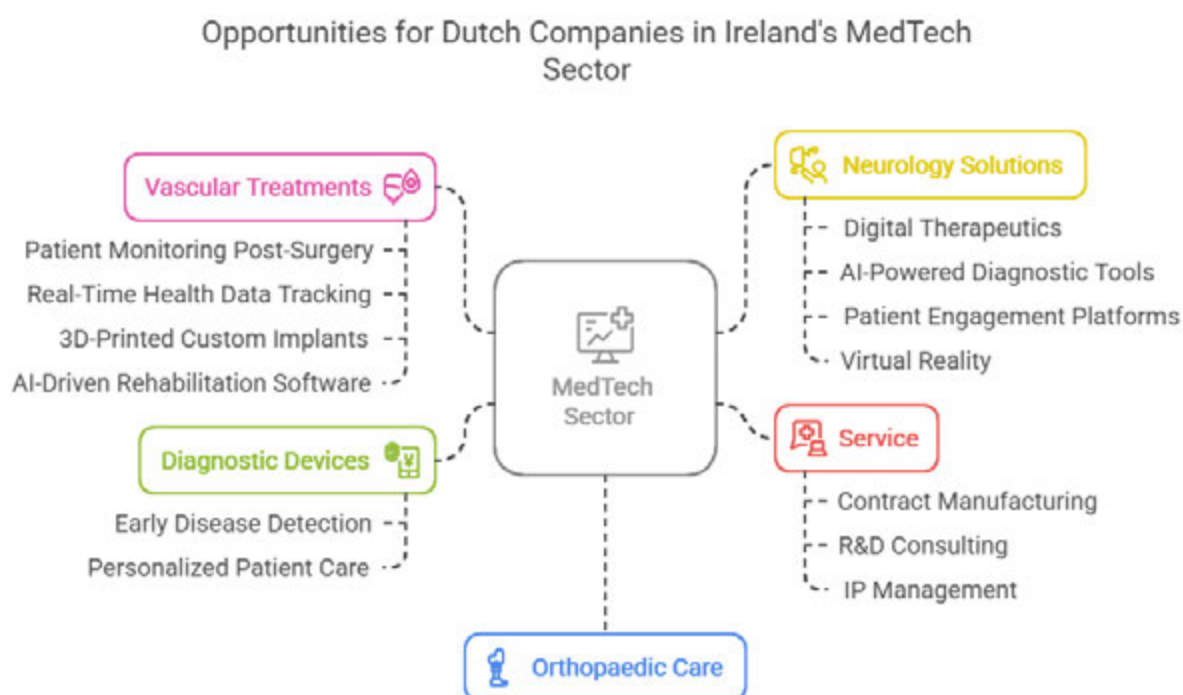
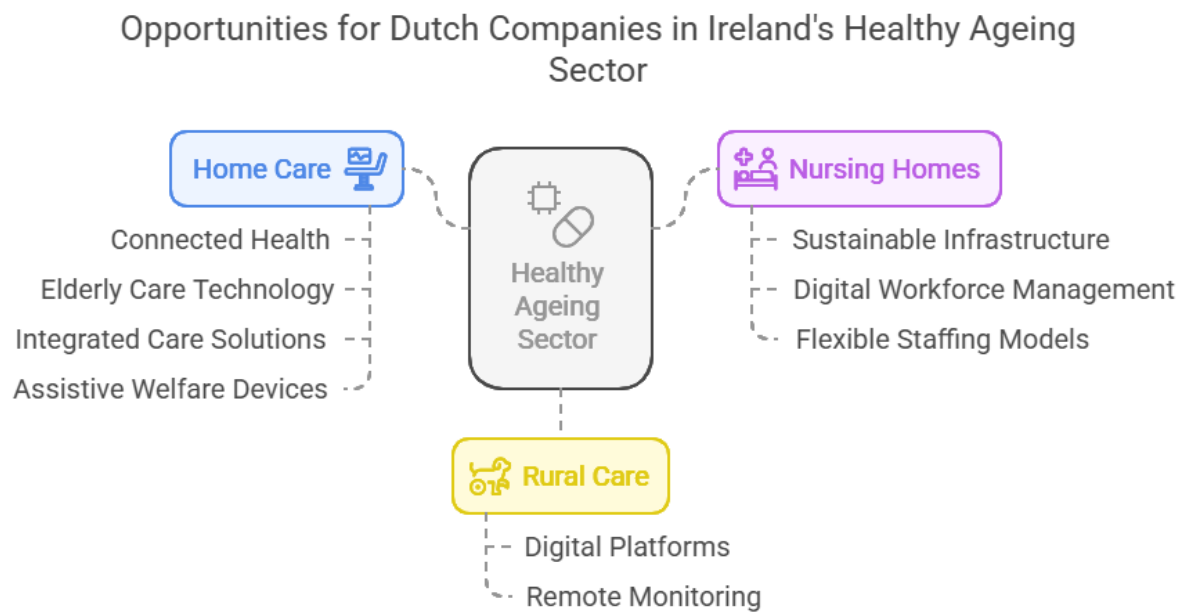


Figure 6: Strengths & Weaknesses of Ireland's Healthy Ageing Sector





Figure 7: Opportunities for Dutch Companies in Ireland's Healthy Ageing Sector



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