

SPANISH DIGITAL HEALTH



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KEY FIGURES 2025



NUMBER OF COMPANIES

719 companies



TOTAL SECTOR TURNOVER

510 M€



TOTAL INVESTMENT

166 M€³



TOTAL INVESTMENT OPERATIONS

34³



MARKET VALUE (Telemedicine & digital health)

2.5 B\$⁴

ACCELERATED GROWTH (2023–2024)



SPANISH PUBLIC HEALTHCARE EXPENDITURE GDP

7.8 %¹



PUBLIC FUNDING (2023)

>800 M€²



DIGITAL ECONOMY GDP (2024)

26 %



EXITS

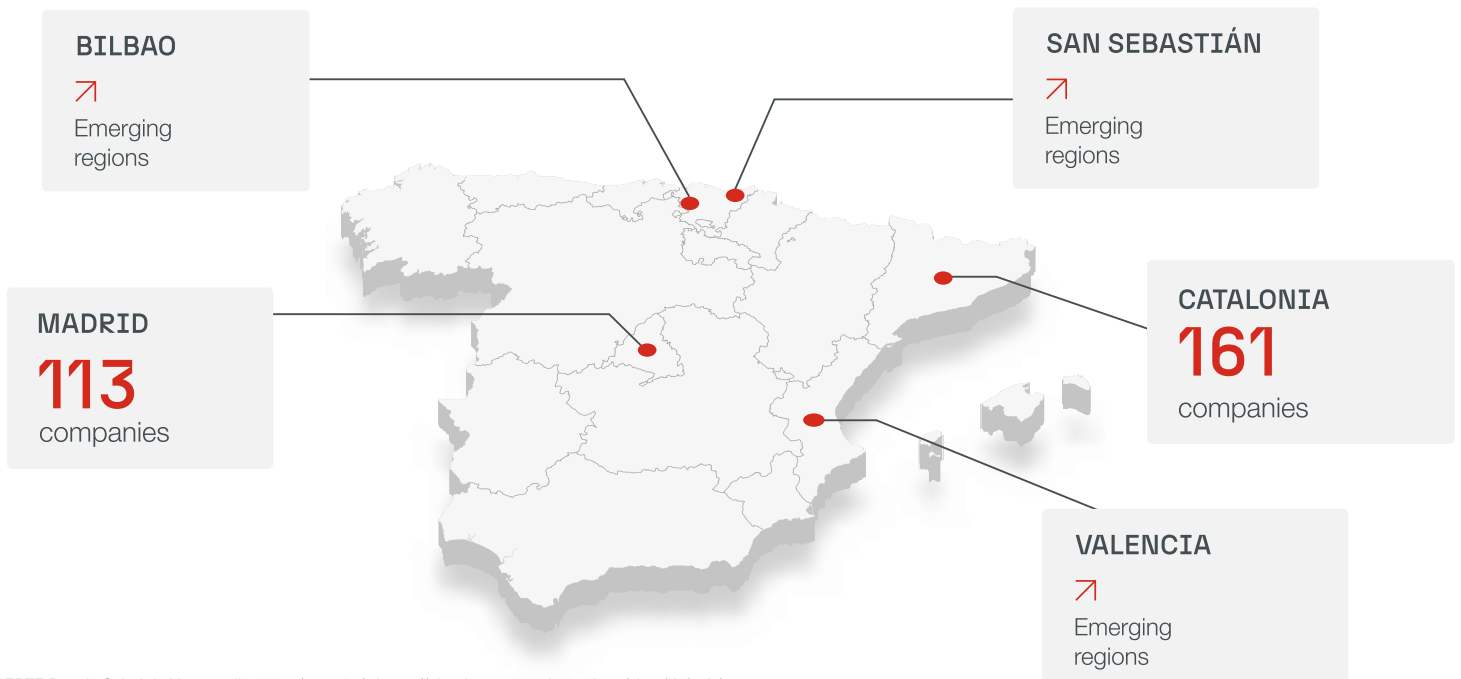
10³

MAIN REGIONS

(by number of companies, 2024)



Valencia, San Sebastián, and Bilbao are progressively advancing in the creation of an innovative fabric and talent retention



¹ PERTE Para la Salud de Vanguardia 2025. (pag. 4-5). https://planderecuperacion.gob.es/sites/default/files/2025-07/PERTE_Salud_de_Vanguardia_Resumen_Ejecutivo_Actualizacion_Junio_2025_V2.pdf

² Estado actual, retos y recomendaciones para la adopción de las terapias digitales en España 2025. (pag. 72). https://consorciotdx.com/wp-content/uploads/2025/09/White-Paper-Actualizacion-_2025.pdf

³ Fundación Bankinter

⁴ <https://www.kenresearch.com/spain-telemedicine-digital-health-market>

WHY INVEST IN DIGITAL HEALTH IN SPAIN?

Digital Health represents a paradigm shift centered on the patient. It refers to the use of Information and Communication Technologies (ICT) in the healthcare sector to improve disease prevention, diagnosis, treatment, monitoring and health management. This sector transcends national borders and integrates enabling technologies such as Artificial Intelligence (AI), Big Data, virtual reality, the Internet of Things (IoT), and telemedicine.

The Spanish digital health sector presents a highly attractive framework for investment, the retention of multinational corporations, and internationalization, supported by the following pillars:

➤ SOLID IMPLEMENTATION BASE AND INTERNATIONAL PRESTIGE

Spain is a consolidated reference in the digitization of health services. The World Health Organization (WHO) places Spain in the most advanced phase (phase 5) of the development of its digital health systems. Furthermore, historically it occupies top positions in the EU in e-health services and access to clinical information.

➤ DYNAMIC AND GROWING BUSINESS ECOSYSTEM

The around 700 startups in the country are the engine of eHealth innovation, developing cutting-edge solutions in clinical AI, digital diagnosis, genomics, and mental health, which generate more than 1 400 direct jobs. There are also excellent collaboration and experience in care innovation with large operators.

➤ CUTTING-EDGE INFRASTRUCTURES FOR TECHNOLOGICAL INNOVATION

Spain has a top-level network aimed at collaboration between universities, startups, and the clinical environment. There are powerful centers for the validation of digital solutions and technology transfer, such as the Carlos III Health Institute (ISCIII), the Vall d'Hebron Research Institute, the Clinical Advanced Technologies Institute (CATI) of the Hospital Clinic, or the Digital Health Validation Center of Sant Pau.

➤ STRONG PUBLIC SUPPORT AND INSTITUTIONAL FUNDING


The government offers a robust framework to boost growth, led by the "Digital Health Strategy of the SNS (2021-2026)," to which more than 800 M€ have been allocated. This support is complemented by the PERTE for Vanguard Health, which will mobilize more than 2.350 B€. Likewise, entities such as CDTI, ENISA, and Red.es are fundamental; the latter is currently injecting 200 M€ into training professionals in digital skills.

➤ AN INTEGRATED AND HIGH-QUALITY HEALTHCARE SYSTEM


The Spanish National Health System (SNS) stands out for its universal coverage of 100 % of the eligible population and operates through centralized and regional services with a successful track record in backbone elements such as interoperable Electronic Health Records (EHR) and electronic prescriptions. Furthermore, the mixed care model fosters synergies between public providers and large private hospital groups.




SUCCESS STORIES


A leading company in digital transformation and IT consulting. It has a strong international presence, being in charge of the development and operation of all health applications for the National Health System of Bahrain. Furthermore, in Colombia, they are implementing Onesait Healthcare Data, a platform that will centralize all clinical information—including medical reports, laboratory results, medication, and healthcare management—across the 22 hospitals of the public network in Bogotá.


A major technological player that has developed the ehCOS technology. Utilizing this proprietary solution, they have successfully implemented the Electronic Health Record (EHR) across the network of public hospitals of the Government of Mexico City. Additionally, the company is a trusted provider for the NHS (National Health Service) in the United Kingdom, which is the world's largest healthcare system.


A pioneering company providing precision medical diagnosis and treatment services. They are at the forefront of the telemedicine and latest-generation radiotherapy fields. Notably, Atrlys Health is the world leader in Spanish-language telemedicine and currently ranks as one of the four largest companies in its sector on a global scale.


Founded in 2011, it is a medical application focused on triage, pre-diagnosis, and clinical decision support. The platform uses Artificial Intelligence to analyze a person's symptoms using Natural Language Processing (NLP) algorithms, obtaining a list of pre-diagnoses that allow for the accurate assignment of medical urgency levels. It is currently collaborating with the Hospital Clínic de Barcelona, where it has demonstrated a 91.3 % success rate in pre-diagnosis and patient classification.

mediQuo **A medical telemedicine application developed by a team of doctors and launched in 2017.** The platform makes it possible for any healthcare professional to attend to their patients remotely through a secure system similar to WhatsApp. It has positioned itself as a leader in Spain and Latin America and is actively consolidating its presence in the United States.

KEY PUBLIC ACTORS

