November 2022. Technology Snapshot

Digital health
in Catalonia

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Digital health in Catalonia

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Prepared by
ACCIÓ's Strategy and Competitive Intelligence Unit

Cooperation
Biocat

Barcelona, November 2022

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1. Definition and importance of digital health

Definition of digital health

Digital health is the set of tools and services that use ICTs to improve the prevention, diagnosis, treatment, monitoring, and management of diseases and health conditions, as well as to monitor and manage lifestyle habits that impact individuals' health

Examples of technological solutions, products and services in different categories:

mHealth (mobile health)

- Nutrition and diet apps
- Access to health data
- Apps to improve medication adherence

Health Information Technology

- IT apps
- Electronic health records
- Electronic prescriptions

Devices, sensors and wearables

- Biometric sensors
- Products for diagnostics

Digital Therapeutics

- Diabetes care support app that reduces risk events.
- Mental health solution that reduces depression symptoms

Personalized Medicine

- Predictive analyses
- Support for clinical decision-making

Telehealth

- Remote visits
- Patient monitoring
- Remote health programmes

Sources: European Commission and the Digital Therapeutics Alliance

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Importance of digital health

The use of technologies in health practices allows us to align with the concept of One Health, which is based on the premise that human, animal and planetary health are all interdependent. The nature of digital health can help strengthen good practices that foment this idea in a way that is multisectoral, cross-cutting, and above all, digitally interconnected.

Health-related digital applications and technologies are experiencing strong growth in research and innovation in response to serious new public health, biological, and climate-change-related threats that require action on a global level. Health treatments supported by ICTs offer new pioneering methodologies and uses to establish a comprehensive view of healthcare (after building a solid foundation through research).

One Health

Innovation

Convergence of technologies

New business models

Impact on the healthcare system

Digital health itself represents a comprehensive, hybrid approach that enables synergies between a large variety of key technologies such as the use of big data, robotics, genomics, cybersecurity and wearables. These give rise to both a high added value and reduced healthcare costs when it comes to prediction, forecasting and quality improvement.

The use of digital technologies in health also entails the appearance of new businesses and business models, through which new market sectors are attracted. These models involve the challenge of creating new, financially sustainable health strategies, platforms and ecosystems, examining the role of insurance, and fostering new forms of public-private collaboration.

Digital health also makes it possible for healthcare systems to become more agile and responsive while promoting optimal care with a balance of speed and efficiency. With the aim of avoiding work overload, the use of digital technologies in healthcare also enables a human-centred approach that seeks to improve quality.

Source: ACCIÓ, ISGlobal, Bit

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2. Global digital health market

Size of the global digital health market

The global digital health market will grow at a rate of **16.5% per year** and will be worth more than **$550 B** by 2027.

Growth factors

- The impact of COVID-19
- Demand for remote solutions
- Rapid expansion of ICT infrastructure
- Increase in smartphone users
- Greater awareness of physical and mental wellness

Global digital health growth ($B). **2020-2027**

Year	Value
2020	181,9
2021	220,2
2022	262,6
2023	309,9
2024	362,4
2025	420,1
2026	483,1
2027	551,1
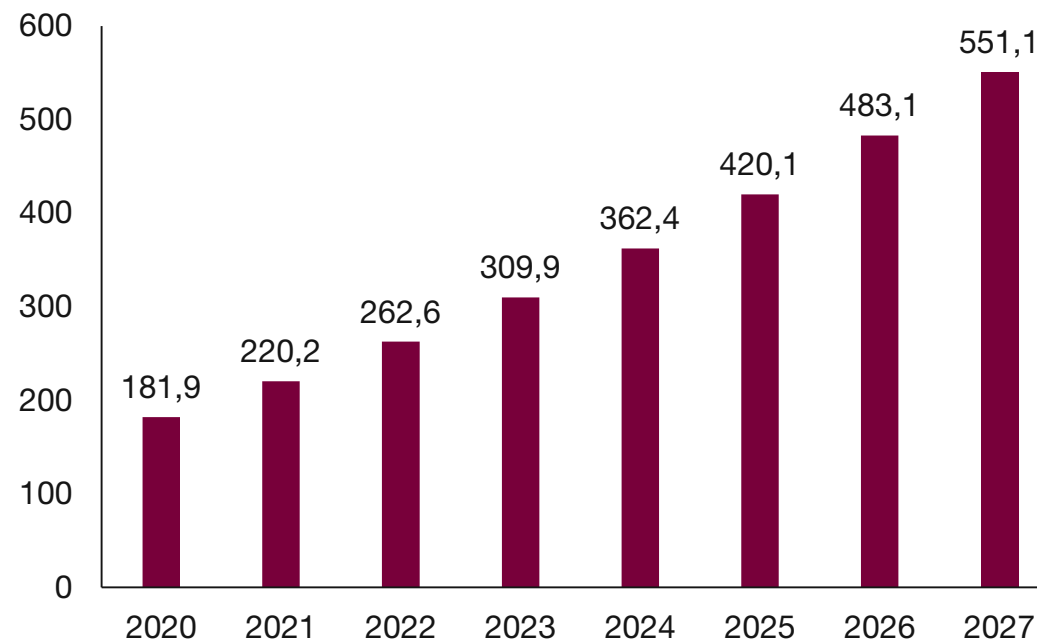
Source: Precedence Research

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Provider Directories & Care Navigation

Alma · carrum health · Headway · ribbon
rightway · spring health · Stork Club · Transcarent

Hybrid Virtual/In-Person Care

CITYBLOCK · eleanor health · elemy · monogram health
papa · Pristyn Care · SOMATUS · Tia · vori health

Digital Therapeutics & Self-Help Tools

AppliedVR · happify health · Hello Heart · kaia health · Koa Health
Limbix · mahana THERAPEUTICS · MEDRhythms · RENDEVER
sidekick · sweetch · Sympatient · TRIPP · twin
unmind · Woebot Health · zeen 正岸健康

Billing & Payments

cedar · SEMPRE HEALTH · soda health

App Development & Deployment

BrightInsight · Centaur Labs · commure · League · xealth

Screening, Monitoring, & Diagnostics

54gene · ablacon · altoida · Astarte Medical · binx
BioIntelliSense · C2i Genomics · Eko · ixlayer
LetsGet Checked · LUMEN · NEUROFLOW · oxehealth
seer · SONDE · STRATA · VocalisHealth

Data Integration & Analytics

1upHealth · bwell · Clarify
ClosedLoop.ai · HEALTH GORILLA · innovaccer
komodo HEALTH · SEQSTER · SYNTEGRA

Clinical Intelligence

ACTIV SURGICAL · caresyntax · LeanTaaS
OVERJET · theator

Digital Health 150 2021
CB INSIGHTS

Home Health Tech

birdie · honor

Virtual Care

adyn · Allara · brightline · cleo
empathy · EQUIP · FOLX · genome MEDICAL
Hinge Health · Jasper · Loop Health
Meru Health · nocd · Ophelia
OSHI HEALTH · OVIVA · Phable · plume
Quit Genius · wheel

Digital Front Door & Patient Engagement

ada · circulo · emocha Health · GYANT · Linkedcare 领健
MEMORA HEALTH · nile · osana · tendo · vital

Digital Pharmacy & DME Fulfillment

better · F/ELD · MEDLY · mPharma
Tomorrow Health · Truepill

Care Coordination & Collaboration

accuRx · Medically Home · PROXIMIE · UNITE US · Vesta healthcare

Workflow Digitization & Automation

AKASA · cohere HEALTH · Congenica · DeepScribe · element5
nym · Olive · osmind · Rad AI · stellarhealth
U LAB SYSTEMS · Wellsheet

Computer-Aided Imaging

Caption Health · cleerly · DIA IMAGING ANALYSIS · elucid vivo
EXO · Iterative Scopes · Lunit · Paige · PathAI
Perspectum · qure.ai · Sce-Mode 数坤科技 SHUKUN · ULTROMICS

Clinical Trials Tech

ACCLINATE · castor · Curebase · ELLIGO HEALTH RESEARCH
Hawthorne Effect · Medable · ObvioHealth · Reify HEALTH

Note: The categories are not mutually exclusive. Companies are mapped according to their main business area.

Among the principal companies and startups, those dedicated to the integration and analysis of data, home health technology, virtual healthcare and clinical intelligence are of special importance.
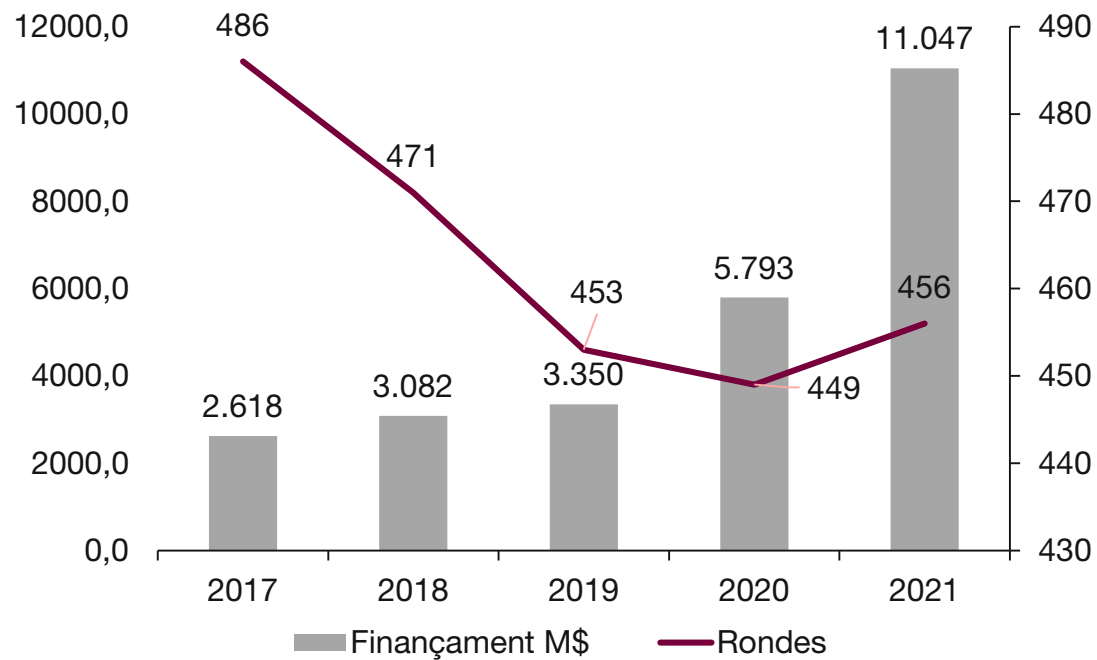
The Catalan company **Koa Health** stands out on a list where most of the companies are North American (117) and only 15 are European.

Source: CB Insights, 2021

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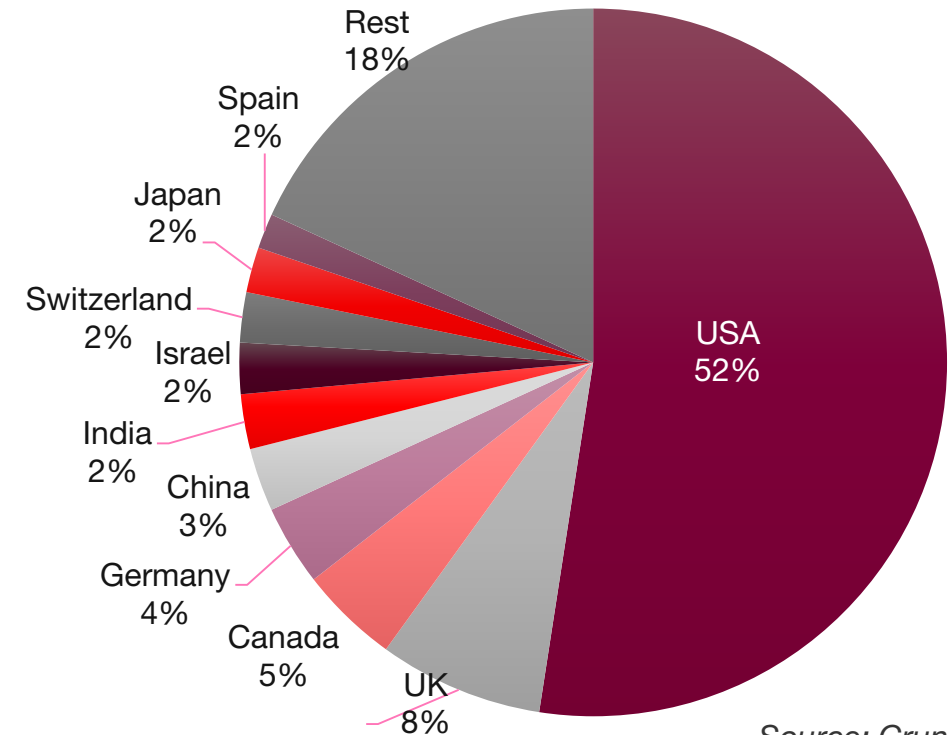CataloniaConnects

Digital health startup financing rounds (I)

The amount of venture capital being poured into digital health startups skyrocketed in 2021, reaching **$11.05 B**, almost twice that of 2020.

More than half of these rounds closed in the **United States**. Other important countries are the United Kingdom, Canada and Germany.

Investment rounds and venture capital financing (2017-2021)

	2017	2018	2019	2020	2021
Finançament M$	2.618	3.082	3.350	5.793	11.047
Rondes	486	471	453	449	456

Geographic distribution of the rounds

USA 52%
Rest 18%
UK 8%
Canada 5%
Germany 4%
China 3%
India 2%
Israel 2%
Switzerland 2%
Japan 2%
Spain 2%

Source: Crunchbase

Estimates for 2022 point to a **drop of 50% in investment and 26% in investment rounds** compared to 2021, to levels similar to those seen in 2020.

Evolution of the capital invested in digital health on a global level
(2018 – third quarter of 2022)

Estimated rounds

3.142

2,311

1.729

Estimated investment 30,000

2018	2019	2020	2021	2022*
2.483	2.592	2.594		
25.600	21.400	32.600	59.600	22.400

■ Capital invertit M$ ——— Rondes d'inversió

* Data up to the third quarter of 2022

Note: This includes venture capital, asset/investment management, private equity, incubators/accelerators, corporations, CVC, Business Angels and others.
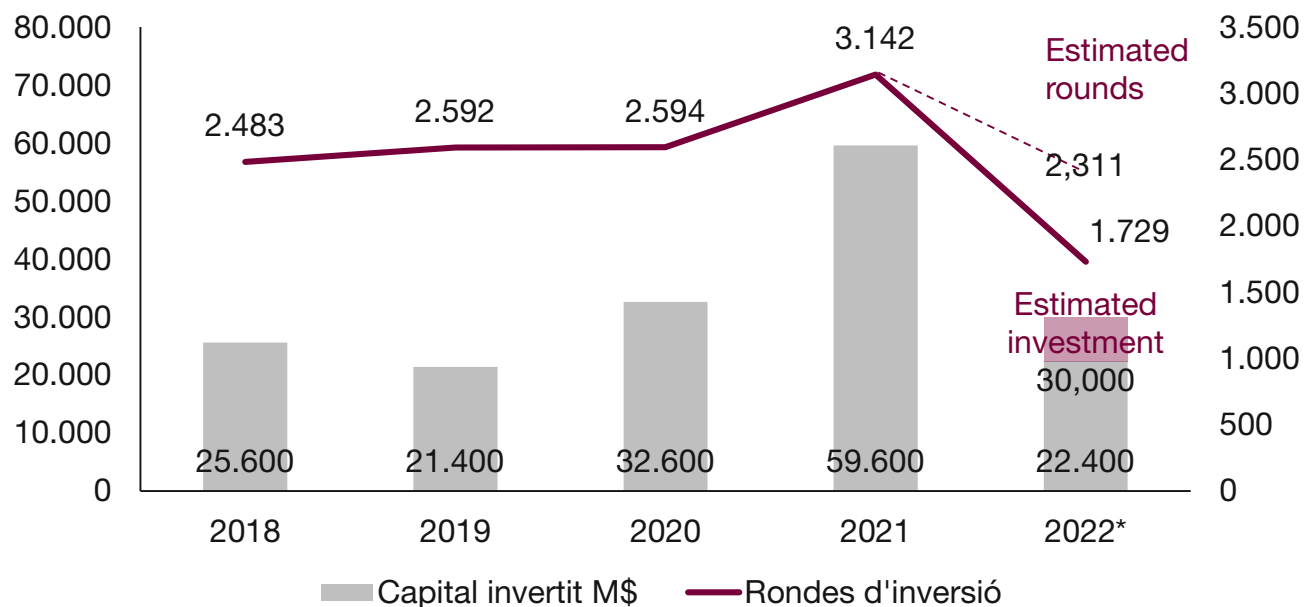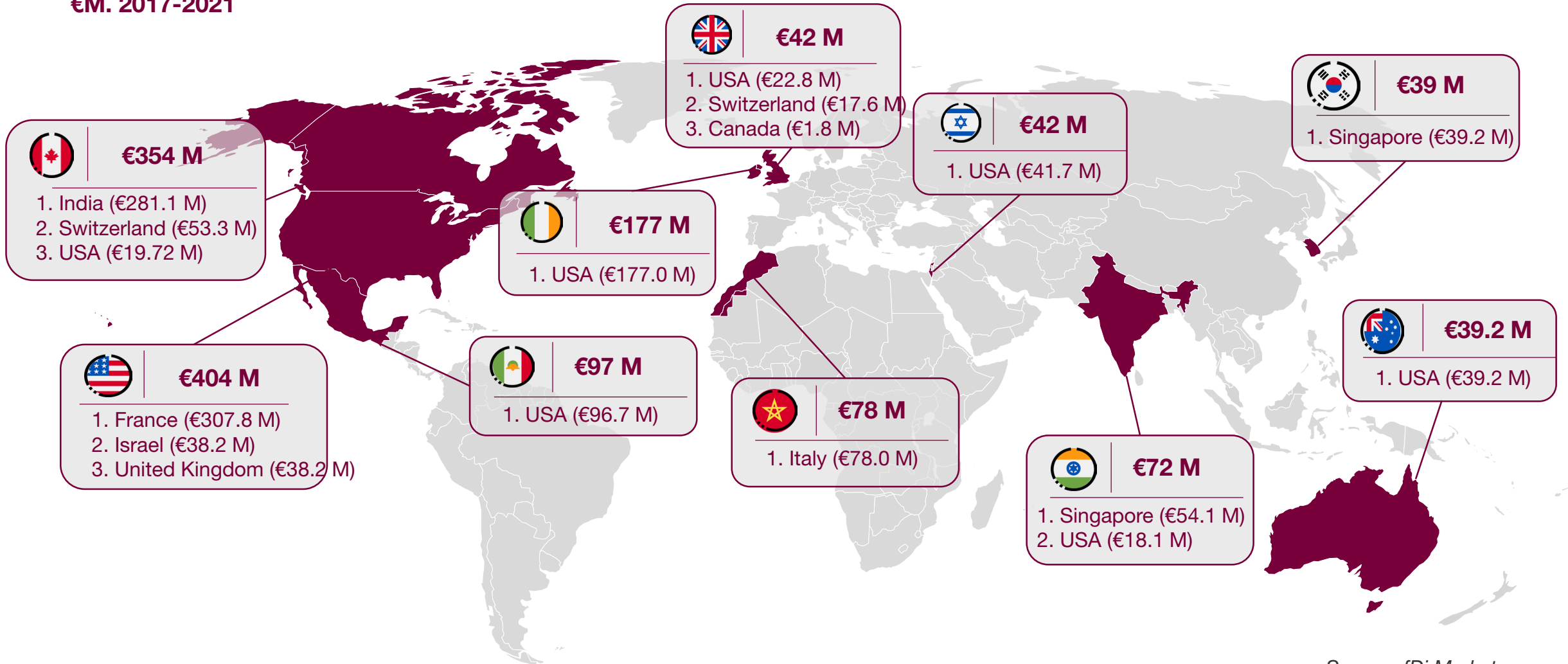
The decrease in rounds and capital invested is in line with a general trend in most technological areas, given the economic situation in 2022 and the uncertainties faced by global investors, coupled with the investment bubble collapse of 2021.

Source: CB Insights

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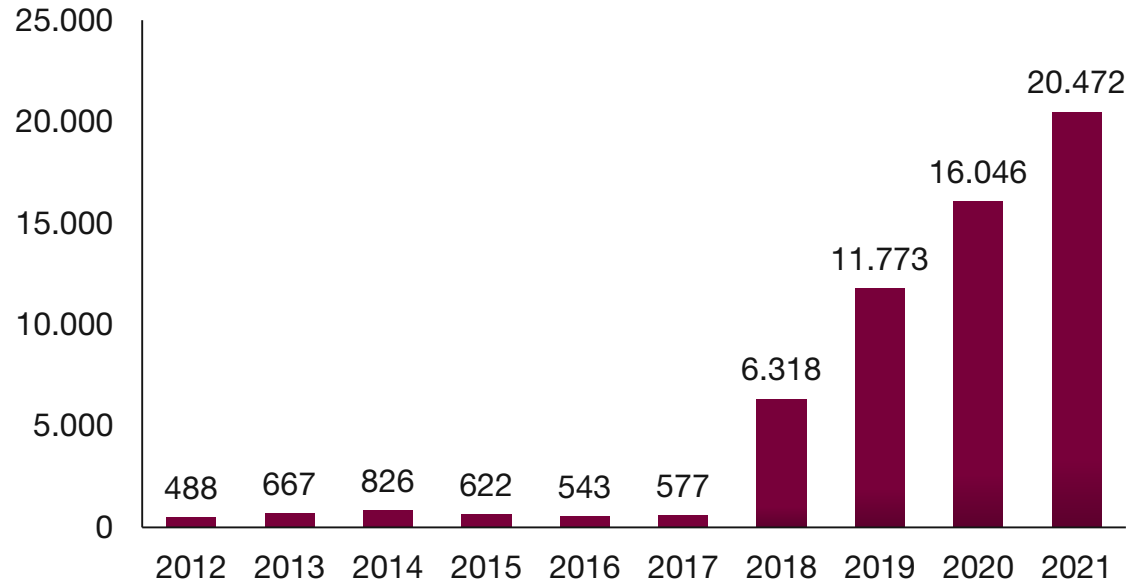
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Foreign direct investment (FDI) in the world of digital health

Top 10 destination countries for FDI in digital health; with the total and the main countries of origin by investment volume in €M. 2017-2021
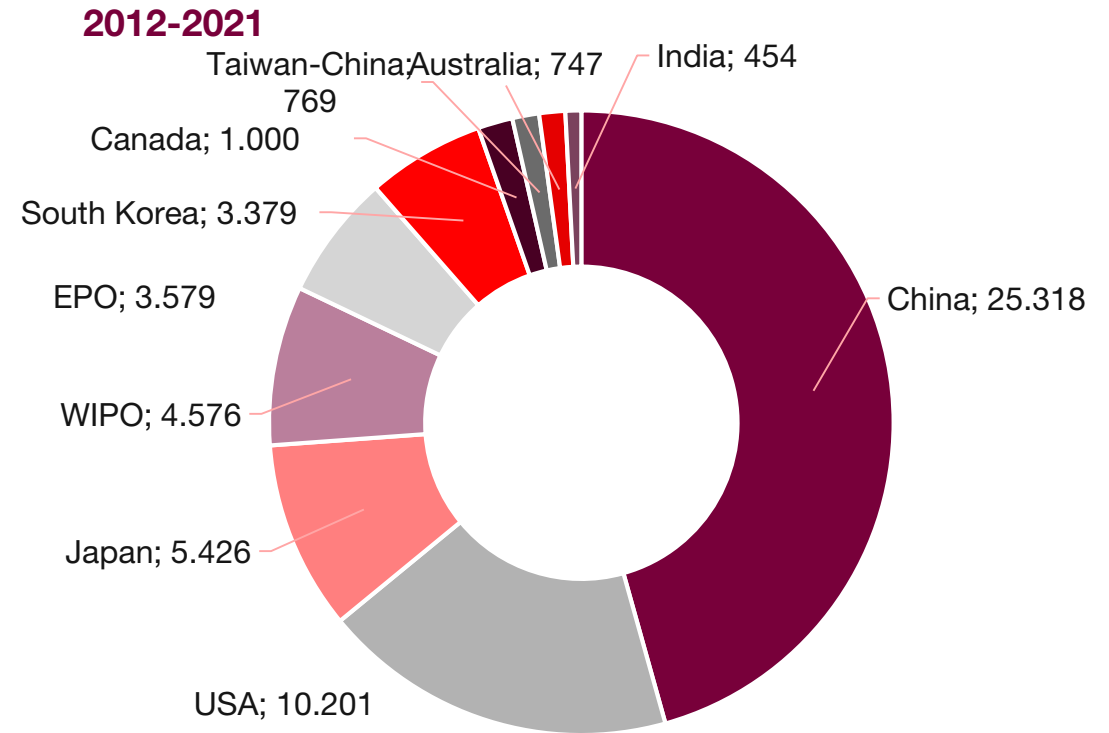
€42 M (United Kingdom)
1. USA (€22.8 M)
2. Switzerland (€17.6 M)
3. Canada (€1.8 M)

€39 M (South Korea)
1. Singapore (€39.2 M)

€354 M (Canada)
1. India (€281.1 M)
2. Switzerland (€53.3 M)
3. USA (€19.72 M)

€42 M (Israel)
1. USA (€41.7 M)

€177 M (Ireland)
1. USA (€177.0 M)

€404 M (USA)
1. France (€307.8 M)
2. Israel (€38.2 M)
3. United Kingdom (€38.2 M)

€97 M (Mexico)
1. USA (€96.7 M)

€39.2 M (Australia)
1. USA (€39.2 M)

€78 M (Morocco)
1. Italy (€78.0 M)

€72 M (India)
1. Singapore (€54.1 M)
2. USA (€18.1 M)

Source: fDi Markets

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Patents in digital health

Global registration of patents related to digital health. 2012-2021

Main Applicants

Note: The G16H codes (ICT adapted to treatment and processing of medical data) of the International Patent Classification have been taken into account.

Registration of digital health patents by jurisdiction. 2012-2021

Taiwan-China; 769
Australia; 747
India; 454
Canada; 1.000
South Korea; 3.379
EPO; 3.579
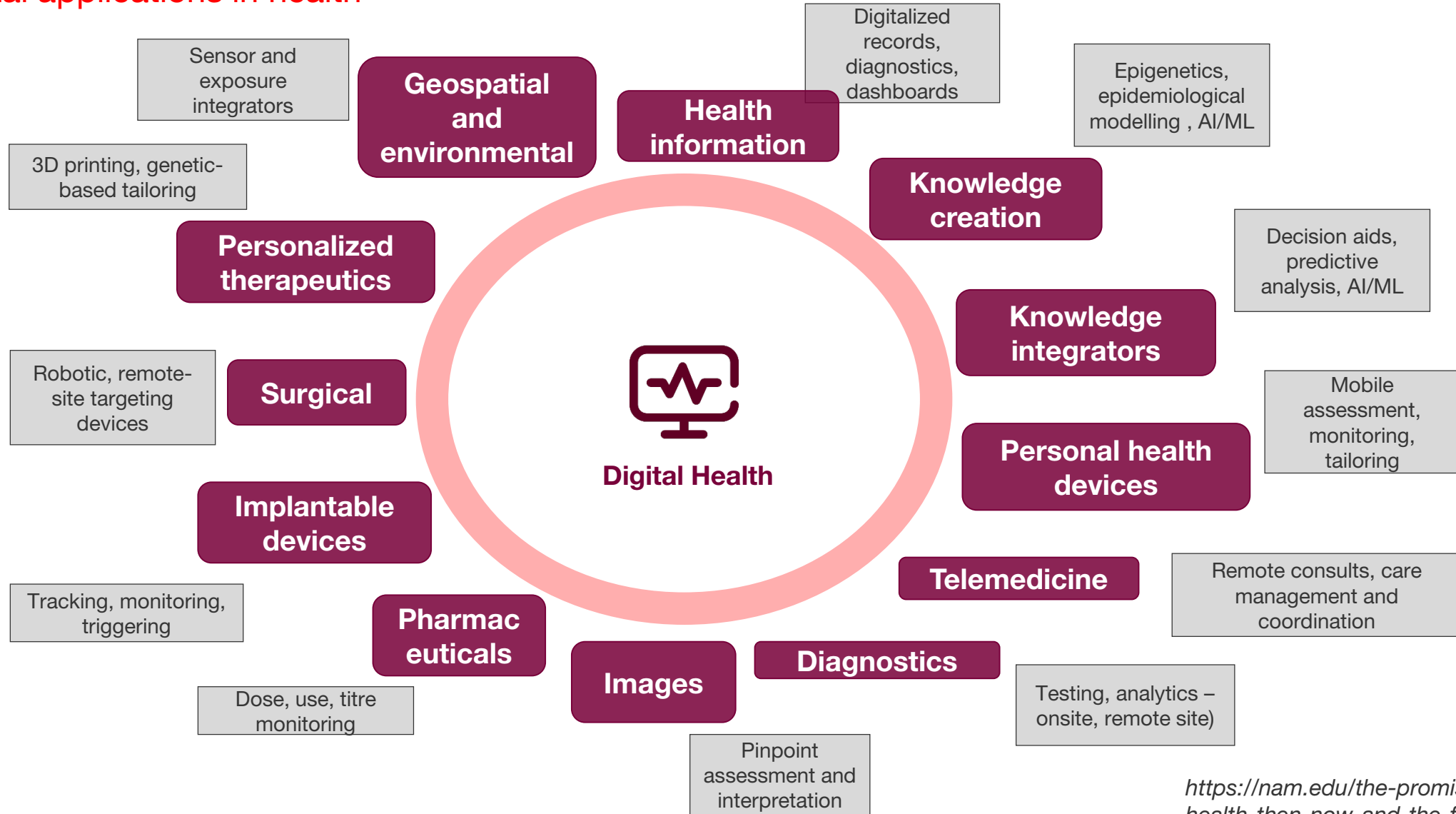WIPO; 4.576
Japan; 5.426
USA; 10.201
China; 25.318

The registration of digital health patents **has increased significantly** in the last four years, reaching a maximum in **2021**. The majority are registered by established technology companies, especially in Europe and North America. China is the principal receiving market for patent registration.

Source: Orbis

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3. Digital health applications and trends

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Digital applications in health

In recent years, technologies have given a boost to the healthcare industry in the detection, prevention and treatment of disease. It has been an extremely beneficial alliance that has helped many fields advance. The introduction of new technologies will help improve efficiency and patient-centred care.

Artificial Intelligence

- Drug development
- Improved cancer diagnosis
- Mental health
- Use of big data to improve the healthcare system, prevent epidemics and improve treatments

Evolution of remote care

- Connectivity, and the system for secure storage of medical data.
- Interoperability of the different systems
- Integration in the public healthcare systems
- Healthcare continuity
- Closing the digital gap

Virtual and augmented reality

- Training for healthcare professionals
- Assistance in surgical interventions
- Treatment of mental health disorders and phobias, and support for the elderly

Internet of Medical Things (IoMT)

- Remote patient monitoring through wearables and other systems.
- Smart pills
- Patient empowerment
- Cost reduction

Privacy and cybersecurity

- Ensuring the privacy and security of patients' medical data
- Ensuring that hospitals and healthcare systems work properly.
- Use of blockchain

Bioprinting

- Creation of new organs using the patients' cells, thus minimizing the risk of rejection

Sources: Forbes, McKinsey, Masschallenges, WHO

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4. Digital health initiatives

The World Health Organization (WHO), in its **Global Strategy for Digital Health 2020-2025**, has established four strategic objectives that will apply to the countries included in a multilateral action plan.

Promote global collaboration and advance the transfer of knowledge on digital health

Establishment of management systems for global knowledge in order to identify and share good practices, tests, opportunities, risks and lessons learned in public and digital health.

Alignment of countries and stakeholders to improve digital health and mitigate threats with the use of digital technologies.

Recognize that successful digital health initiatives require an integrated strategy

Integration and enhancement of digital technologies in established national health strategies through all appropriate legal and ethical frameworks for data security.

Promotion of sustainable financing models for the development of digital health.

Strengthen governance for digital health at global, regional and national levels

Strengthening digital health governance structures, including regulatory frameworks and the ability to implement evidence-based solutions.

Using a people-centred approach to facilitate actions and investments based on informed decisions and promoting competence development, and creating skills for leaders and political actors.

Advocate people-centred health systems that are enabled by digital health

Development of proper literacy in technological and/or digital app and data skills for users and healthcare workers, including continuous training and encouraging citizen participation (forums, etc.)

Introduction of digitized follow-up and assessment forms to reduce saturation at primary care centres and reinforce gender equality and equity.

Source: WHO

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Initiatives in the European Union

Digitalization of health systems is a key aspect in the digital transformation of the economy and society, one of the six political priorities of the European Commission for the 2019-2024 period.

The European Commission's Communication on enabling the digital transformation of health and care in the Digital Single Market (April 2018) set the theoretical precedent for technologically rising to the challenges of the ageing population, chronic diseases, unequal access to healthcare and training of healthcare professionals. It set the following objectives:

Citizens' secure access to and sharing of health data across borders

Better data to advance research, disease prevention and personalized health and care

Digital tools for citizen empowerment and person-centred care

European Health Union

The European Health Union's current project is part of the objective of improving protection, prevention, preparation and response as regards dangers to human health at EU level. The French presidency of the Council of the European Union in the first half-year of 2022 aims to publish a digital health barometer to monitor the development and appeal of the sector. The use of technologies is included in **current initiatives** such as:

European Health Emergency Preparedness and Response Authority (HERA). Medical countermeasures for health crises.

Pharmaceutical strategy. Access to drugs and medical needs that are not covered.

Europe's Beating Cancer Plan. Prevention, detection and patient quality of life.

Sources: European Commission, aboutDigitalHealth

Digital health initiatives in Catalonia

SISCAT's Master plan for information systems

The plan identifies, agrees on and executes the opportunities for healthcare improvement with the application of ICTs and develops digital health and process re-engineering solutions in different healthcare areas.

Shared clinical history

Catalonia's shared clinical history is a tool that compiles the set of documents containing data and important information about patients' situation and the evolution of their healthcare process.

Electronic prescriptions

An electronic prescription is a tool that allows for comprehensive management of pharmaceutical services by progressively incorporating the prescriptions made in different healthcare areas.

Innovative public procurement (IPP)

IPP is a public procurement tool that fosters innovation as a key instrument to make strides towards a more intelligent, sustainable and integrative growth model. It contributes to the transformation and improvement of public services and therefore to citizens' quality of life.

La Meva Salut

La Meva Salut (My Health) is a personal digital health space that makes it easy for users to consult clinical and diagnostic reports and the results of clinical analyses and tests that are part of their clinical history.

Health services integrator iS3

iS3 is an interoperability technology platform for the management of healthcare processes through integration of the different information systems used by health providers and social services.

Capture and integration of clinical images

This digital service is geared towards primary care and specialized outpatient healthcare professionals, integrated with ECAP (Primary Care Clinical Station, a computerized clinical history program). It allows clinical photographs taken on mobile devices to be added to the clinical history of patients and to referral requests between healthcare areas.

5. Digital health in Catalonia

Mapping the digital health ecosystem in Catalonia (I)

267 companies   **€438.3 M**   **3,085** jobs

91.0% are SMEs.

72.6% are less than 10 years old.

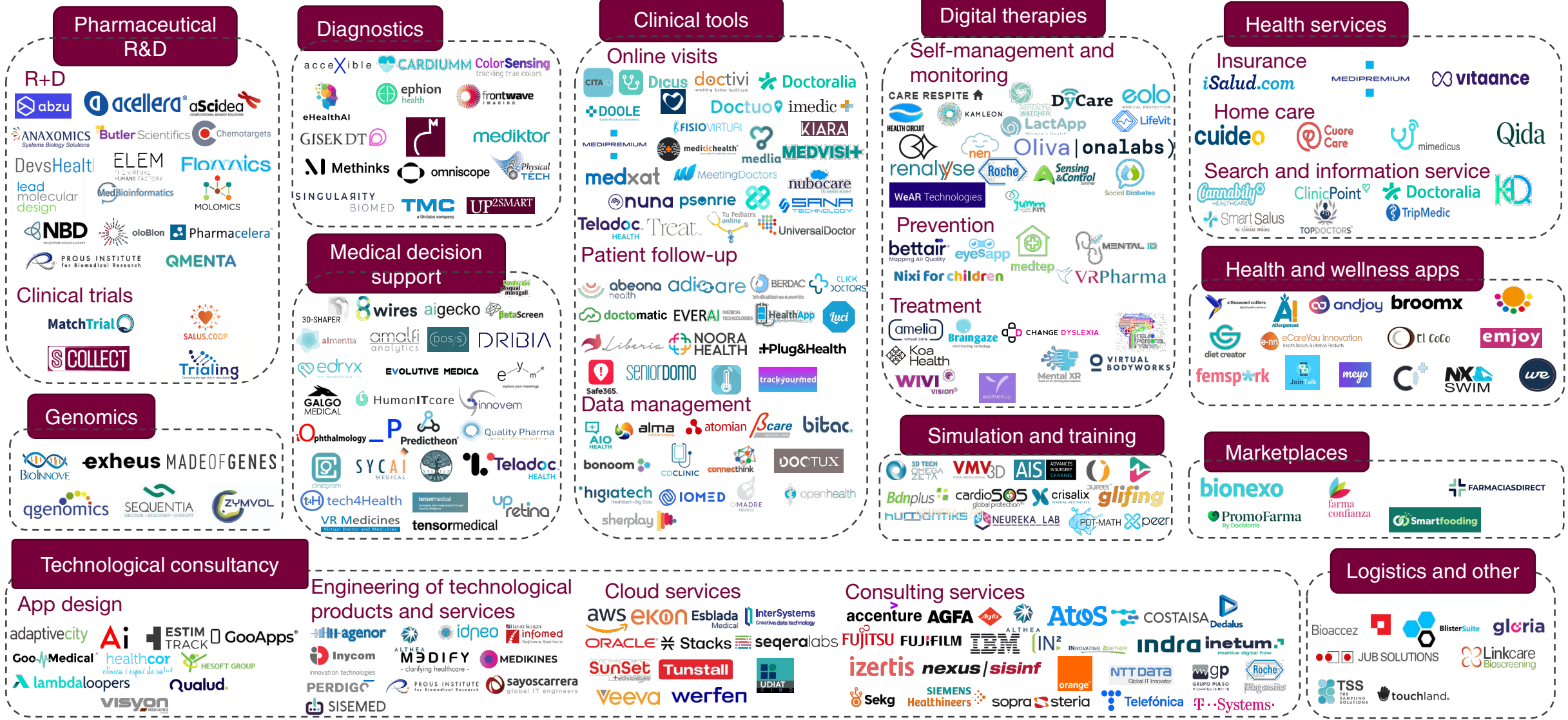**24.6%** have turnover of more than €1 M and **3.6%** have more than €10 M.

26.2% are exporters.

22.0% have women in C-level positions (executives).

The work areas with the most companies are **technological consultancy** (20.6%), **clinical tools** (19.9%), **digital therapies** (12.7%) and **support for medical decision-making** (9.7%).

DNA

patient #08001

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Mapping the digital health ecosystem in Catalonia (II)

Fem avui l'**empresa** del demà

A total of **267** companies shape the mapping of digital health activity in Catalonia, where **202** startups fully dedicated to digital health stand out, turning this into an emerging and very dynamic sector

1. Startup Pure players – 202 technological startups strongly linked to digital health

2**.** Established companies linked to digital health

3. Transversal companies that provide technological solutions, developers, designers, programmers, in the field of digital health

Font: ACCIÓ i Biocat. Informe de la bioregió 2021
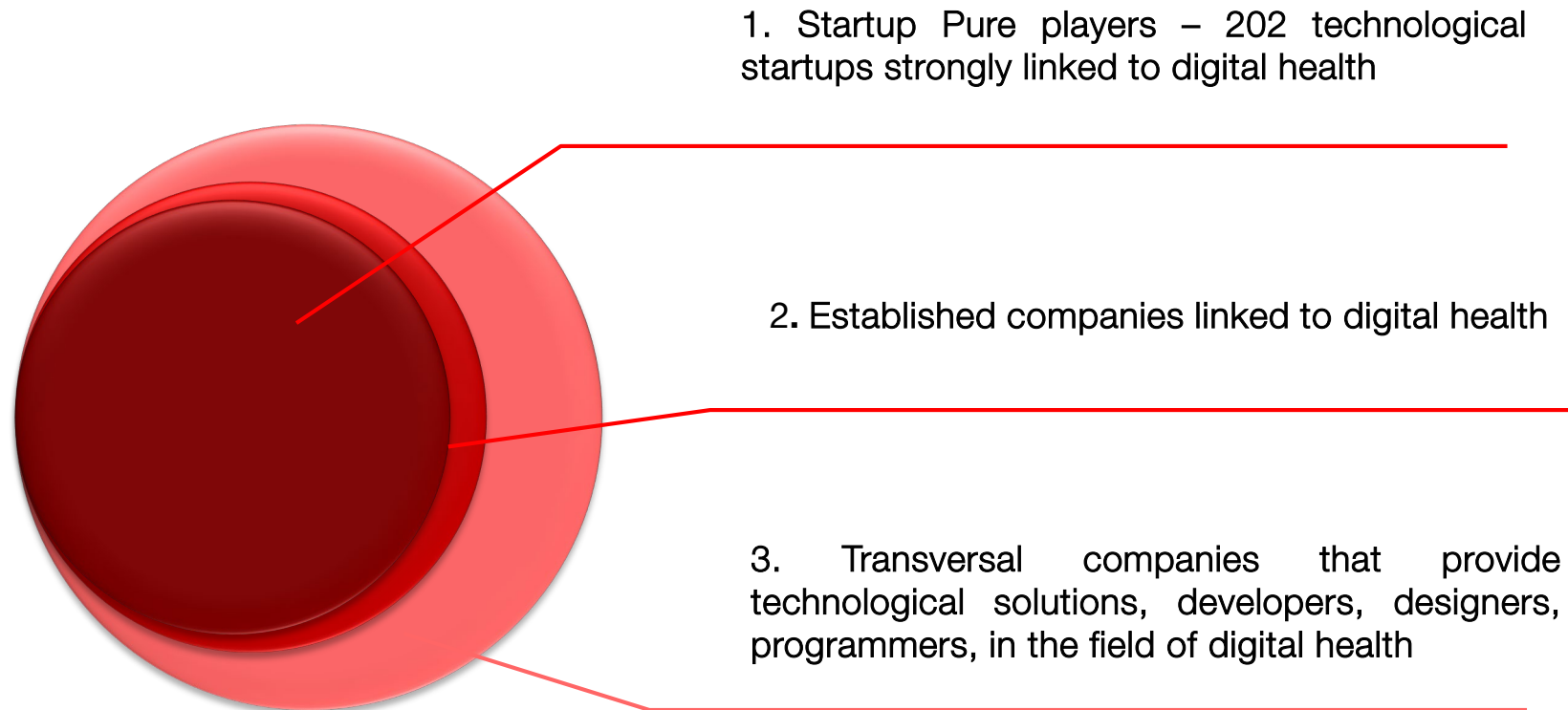
Actors in the digital health ecosystem in Catalonia

Centres for research and technology, hospital research institutes and hospitals

barcelonaβeta — BRAIN RESEARCH CENTER · BSC Barcelona Supercomputing Center · Centro Nacional de Supercomputación · CIDAI Centre of Innovation for Data tech and Artificial Intelligence · CREB UPC UNIVERSITAT POLITÈCNICA DE CATALUNYA BARCELONATECH · Centre de Recerca en Enginyeria Biomèdica · CVC · eurecat Technology Centre of Catalonia · i2cat · FUNDACIÓ CLÍNIC BARCELONA · IDIBAPS · IIIA-CSIC INSTITUT D'INVESTIGACIÓ EN INTEL·LIGÈNCIA ARTIFICIAL · 25 anys 1994-2019 · CSIC · IMIM Parc de Salut MAR · Institut Hospital del Mar d'Investigacions Mèdiques · Institut Guttmann · ISGlobal Instituto de Salud Global Barcelona · LEITAT managing technologies · Parc Taulí Institut d'Investigació i Innovació I3PT · SJD Sant Joan de Déu Barcelona · Hospital · UOC Universitat Oberta de Catalunya · eHealth Center · Vall d'Hebron · Vall d'Hebron Recerca

Universities and training centres

UAB Universitat Autònoma de Barcelona · UNIVERSITAT DE BARCELONA · Universitat de Girona · UIC barcelona · Universitat de Lleida · UOC Universitat Oberta de Catalunya · Barcelona Digital Talent · UPC UNIVERSITAT POLITÈCNICA DE CATALUNYA BARCELONATECH · upf. Universitat Pompeu Fabra Barcelona · UNIVERSITAT RAMON LLULL · A+ UNIVERSITAT ROVIRA I VIRGILI · UVIC UNIVERSITAT DE VIC UNIVERSITAT CENTRAL DE CATALUNYA · BTS Barcelona Technology School

Acceleration programmes

CIMTI · CRAASH BARCELONA TRANSFORMING TECHNOLOGIES INTO HEALTH SOLUTIONS · d·HEALTH BARCELONA PART TIME TRAINING THE NEXT GENERATION OF HEALTHCARE INNOVATORS · The Collider · Ship2B Foundation ADVENTURERS FOR A BETTER WORLD · TecnoCampus StartHealth Aceleradora de start-ups de salud · wayra

Associations and networks

Beauty Cluster · BARCELONA HEALTH HUB · BIB BIOINFORMATICS BARCELONA · BIST Barcelona Institute of Science and Technology · CataloniaBio & HealthTech Connecting companies · CERCA Centres de Recerca de Catalunya · Clúster Digital · fundación iSYS internet, salud y sociedad · P · Tech Barcelona · tecnio Associació · xartecsalut

Government institutions and administrations

ACCIÓ Catalonia & Trade Investment · Generalitat de Catalunya · biocat · Salut/ Agència de Qualitat i Avaluació Sanitàries de Catalunya · eit Health · Barcelona Activa · TS CatSalut Servei Català de la Salut · TIC Salut Social

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Source: ACCIÓ

Investment in Catalonia

Digital health investment in startups increased five-fold over the past five years and the number of rounds doubled

Investment in digital health startups in Catalonia (€M).
2017-2021
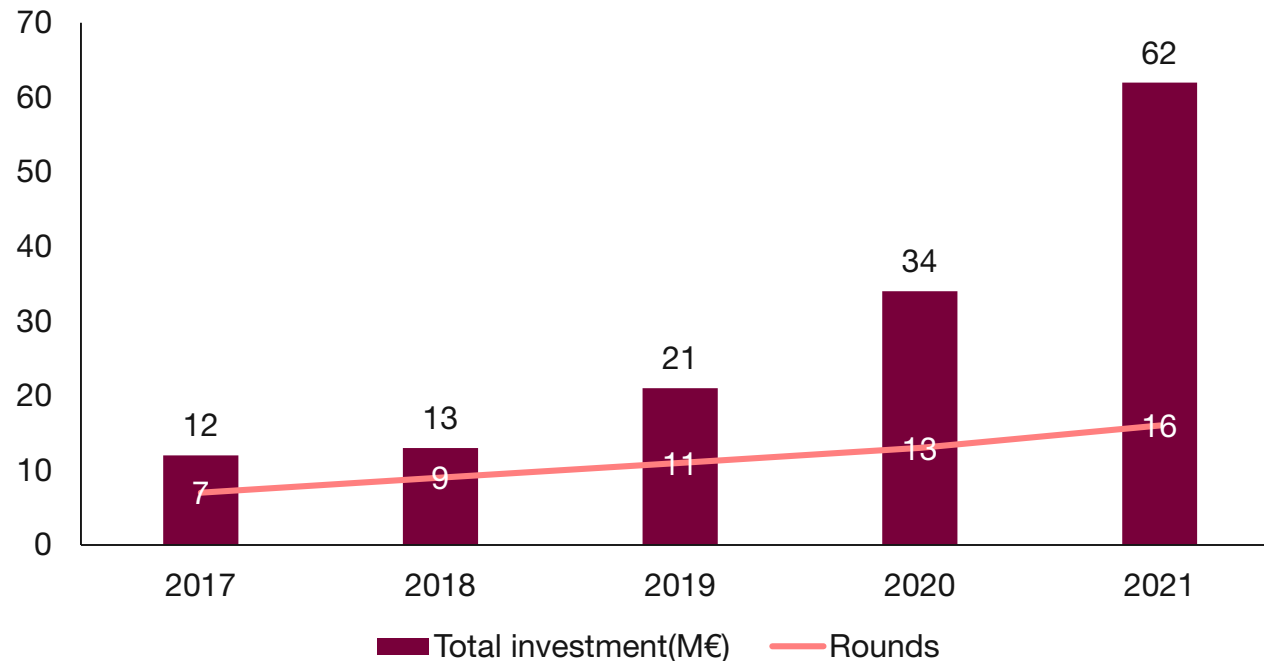
- The mean private capital round value **doubled in five years**, going from €1.5 M in 2017 to more than €3 M in 2021.

- We are starting to see **large venture capital operations (over €10 M)** with one operation in 2020 and three in 2021.

- The number of different **international venture capital funds** investing in digital health companies in Catalonia **increased six-fold in five years,** going from five in 2017 to 30 in 2021.

Source: Biocat

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Investment secured by digital health startups

Key digital health investments in 2021-2022

10 principal investments in digital health startups in Catalonia (2021-2022)

Koa Health	TOPDOCTORS	mediktor	Durcal	amelia virtual care
€15.9 M 2021	€11.2 M 2021	€11.2 M 2021	€8.0 M 2022	€7.0 M 2022
Oliva	cuideo	HumanITcare	Oliva	DyCare DYNAMIC CARE SOLUTIONS
€5.7 M 2022	€5.0 M 2022	€2.5 M 2021	€2.0 M 2021	€1.3 M 2022

Note: Checked on Dealroom (19/10/2022) using Catalonia as the founding or HQ location. Venture capital was taken into consideration.

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Main digital health investors in Catalonia

Established in Catalonia

ALTA LIFE SCIENCES · asabys · Caixa Capital Risc · CG HEALTH VENTURES · NINA. CAPITAL · inveready · SeedLink Grow Health · YSIOS CAPITAL · invivocapital

International

ANCORA · IMPACT SOCIAL. LOCAL & GREEN INVESTING · wellingtonpartners · MANGROVE CAPITAL PARTNERS · mtip · Si Speedinvest · TARGET GLOBAL

Source: Biocat

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Catalan universities offer bachelor's and master's degree programmes on knowledge applicable to digital health. Comprehensive care, data analysis and biomechanics technologies will allow us to have innovative products and services that will offer personalized, preventive, predictive and participative healthcare.

Bachelor's degree

- Bioengineering
- Bioinformatics
- Biotechnology
- Human Biology
- Applied Data Science
- Data Science and Engineering
- Biomedical Engineering
- IT Engineering
- Health Engineering
- Artificial Intelligence
- Software Application Techniques

Master's degree

- Data Analysis in Omics
- Automation and Robotics
- Bioengineering
- Bioinformatics
- Bioinformatics and Biostatistics
- Bioinformatics for the Health Sciences
- Advanced Biotechnology
- Biomedical Data Science
- Medical Imaging Computing
- Cybersecurity
- Biomedical Engineering
- Computational Biomedical Engineering
- Big Data Engineering
- IT Engineering
- Principles of Data Science

Catalan universities that offer digital health training

UPC

UAB Universitat Autònoma de Barcelona

UNIVERSITAT DE BARCELONA

UNIVERSITAT ROVIRA I VIRGILI

Universitat de Girona

Universitat de Lleida

UOC Universitat Oberta de Catalunya

UVIC UNIVERSITAT DE VIC UNIVERSITAT CENTRAL DE CATALUNYA

upf. Universitat Pompeu Fabra Barcelona

Universitat Ramon Llull

In 2022, the UB launched the UB Siemens Healthineers Chair in **Digital Healthcare**

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Source: ACCIÓ

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6. International opportunities

International business opportunities in digital health

Principal markets with business opportunities identified by ACCIÓ:

China — The Chinese market for elderly care will grow in the coming years.

Thailand — The healthcare sector has grown at a rate of 8% per year. Thailand imports 80% of its medical equipment.

Austria — The pandemic accelerated the search for medical solutions for remote patient treatment and support.

Hong Kong – China — Hong Kong-China is a strategic location for medical equipment and healthcare companies.

Japan — Japan has a shortage of medical care and nursing resources, despite an increase in the elderly population.

Canada — The strong need for health digitalization makes for fertile ground for Catalan SMEs.

Hungary — The Hungarian market represents an excellent opportunity for applied healthcare technologies.

Netherlands — The Netherlands requires remote medical solutions that patients and healthcare staff can use.

Colombia — Colombia imports 81% of its medical devices from the rest of the world, mostly Europe.

Brazil — Brazil will introduce new technologies that will allow for more efficient management of healthcare resources.

United Kingdom — The evolution towards digital solutions for patient care makes this country a global reference.

Ireland — Ireland offers opportunities in the area of medical devices and equipment and digital health.

Source: ACCIÓ (2022): Global Map of International Business Opportunities

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7. Success stories

Success Stories in Catalonia

Koa Health is a company offering therapies for mental health.

Mediquo is a comprehensive telemedicine platform for professionals.

Amelia Virtual Care provides access to the advantages of immersive technology for mental health.

Top Doctors is a platform to find and contact medical specialists in the private healthcare system.

Mediktor has developed an AI algorithm that recognizes symptoms using language recognition.

Trialing is a platform that helps healthcare staff to connect their patients with clinical trials that treat their conditions

Sequentia analyses genomic data to create and improve diagnostic and therapeutic solutions.

ELEM creates populations of avatars to predict the result of pharmacological therapies and medical devices.

Human IT Care is a platform based on artificial intelligence that provides monitoring and remote care.

Teladoc Health offers ICT services for digital medical care to healthcare organizations and individuals around the world.

Cuideo is a company offering home care, mobile telehealth and medical and psychological consultations.

Zur Rose-Profarma specializes in e-commerce, drug distribution and online sale of parapharmacy products.

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More information about the sector, news and opportunities
https://catalonia.com/key-industries-technologies/health-life-sciences

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