Telemedicine in Spain: A HealthTech Charter Fitness Check

The opportunities and challenges facing the digital health innovation sector in Spain

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Introduction

Digital technologies are key to unlocking better health outcomes for all Europeans and beyond. Entrepreneurs must be empowered with the right tools to scale their solutions across borders. This rests in creating a startup-friendly, inclusive regulatory landscape.

Launched in December 2021, the HealthTech Charter serves as a best practice repository of the most empowering policies and measures for digital health innovation across Europe. It provides an opportunity to shape the EU into a hub for digital health scale-ups and creates benchmarks to inform policy makers what innovators need to succeed. Sharing best in-class policies will not only improve individual ecosystems, it will also smoothen the pathway for a digital health startup that is successful in one country to be successful in the whole of Europe.

Given that health is a primary competence of EU Member States, it is imperative that national and European policies are aligned and harmonized as much as possible. Allied for Startups is therefore zooming into the Member State level to conduct Fitness Checks of the national healthtech regulatory ecosystem - and we're starting off with Spain.

Spain has been a long supporter of the digital transformation of health. Spotlighted by the COVID-19 pandemic, telehealth solutions increasingly took hold. Reflected in its 2026 Digital Health Strategy, the Spanish Government outlines key lines of action to tackle health challenges. From interoperability standards to electronic health records - Spain has set ambitious targets to maximize the potential digital health has to offer. But how has this strategy led to success on the ground for startups?

The Spanish Fitness Check consists of a multi-stakeholder perspective on the telemedicine healthtech ecosystem, one of the main topics explored in the HealthTech Charter. It aims to map out the Spanish telemedicine environment and reveal areas for improvement to best empower digital health innovators with the tools to succeed.

The Spanish Telemedicine Ecosystem

The demand for telemedicine services reached an unprecedented peak during the Covid-19 pandemic. Telehealth solutions, such as online consultations or telemonitoring, enabled medical care to be provided remotely during times where access to services were limited. Entrepreneurs continue to develop telemedicine services that offer speedy, innovative, and flexible solutions to people all around the world. The availability of these digital solutions on a mobile phone, watch, or laptop contributes to the universal democratization of health and care.

With a rise in virtual consultations as an alternative to physical consultations, telemedicine services have increasingly scaled out across Spain. Remote care became one of the key pillars to prevent the spread of Covid-19, redefining the traditional means of healthcare delivery. Startups in Spain have been leading innovators in telemedicine - creating innovative solutions to provide health professionals and patients with the right tools to increase efficiency, accessibility and cost-effectiveness of healthcare. From Amelia Virtual Care's virtual reality platform designed to bring value to mental health treatment to MediQuo's telemedicine platform offering patients and doctors a complete overview for their remote care - the Spanish telemedicine ecosystem is booming.

Telemedicine Regulation

With the record saturation of telehealth in Spain, multiple barriers still need to be addressed to facilitate its sustainable adoption into the national healthcare system. As with most countries across the European Union, there is currently a lack of legal clarity for telemedicine in Spain. This has contributed to an environment of uncertainty and regulatory loopholes. According to Cristian Pascual, CEO and Founder of Mediktor....

"...we do not have a simple and clear regulation for eHealth and telemedicine, it's a combination of regulations that are not adapted to eHealth reality and makes it not easy for new startups to emerge."

mediktor

With telehealth being unregulated, startup founders in Spain have found themselves having to navigate a range of standards at different levels of governance. The CEO of Top Doctors, Alberto E. Porciani, notes that "…Spain is faced with a lack of clear legislation on telemedicine that unifies the different European, national, and regional criteria. We need a policy that regulates digital health, and that covers both doctors and patients providing them with a legal framework that protects health in the digital environment." Similarly, Co-Founder and COO of Doctomatic, Carmen Rios shares…

"The only channel to adopt new digital tech comes from EU regulations. The current market is only accessible to large companies with deep pockets and the market requires a regulated fast track to allow innovative solutions to flourish in the correct environments."

Policy Recommendation
Legal clarity - A Spanish Telemedicine Framework

The excessive care burden resulting from Covid-19 placed an increased demand on telehealth within Spain, creating momentum for the implementation of a regulatory framework to consolidate this uptake. Regulating telemedicine in Spanish legislation to counteract fragmentation and specify the dos and don'ts for telehealth would result in greater acceptance of its services amongst consumers and providers - empowering innovators to keep bringing life-changing solutions to the market. According to Cristian Pascual…

A clear, unified telemedicine framework will need to be adopted in order to fully capitalize the benefits of telehealth.

"We have a vibrant ecosystem but if we do not evolve [a telemedicine] regulation it will be more difficult to compete on a global scale."

Best Practice

France's dedicated legal framework for telemedicine provides clear rules for online consultations, including diagnosis, follow-up, telemonitoring, prescriptions and tele-expertise. Moreover, it introduced reimbursements at par with physical visits. Doctors are incentivized to use telemedicine solutions: an annual payment of 350€ is provided to cover related costs such as computer equipment or subscription fees.

✓ Legal Framework   ✓ Doctors incentivized to use telemedicine

Reimbursement Schemes

Coupled with the need for telehealth regulation lies one of the most important pillars for digital health - reimbursement schemes. Through data-based treatment decisions, empowered patients and providers, and lower overall costs – the digital health revolution is rapidly expanding across the medical field. However, a key barrier to the wider adoption of digital therapies and telehealth solutions is the lack of standardized pathways to reimbursement and prescription across European healthcare systems. In Spain, telehealth is not reimbursed by statutory health insurance.
Cristian Pascual notes that reimbursement is

a large obstacle as "Public health tenders are not designed to buy innovation, in fact the opposite, it's very difficult to sell innovation to public health entities." Increasing the uptake of telemedicine lies in ensuring their prescription by doctors and subsequent reimbursement by health insurance. Alberto E. Porciani reflects on…

"…the need for a normative basis for the reimbursement of online consultations, so that they can be incorporated into the system and normalized on a day-to-day basis."

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Policy Recommendation
Introducing Telemedicine Reimbursement

A key barrier to the wider adoption of digital therapies and telehealth solutions is the lack of standardized pathways to reimbursement and prescription across Spanish and many other European healthcare systems - where publicly-funded health systems are the norm. Ensuring the uptake of telehealth solutions lies in an equal treatment of online and in-person consultations - which stems in allowing telemedicine to be reimbursed by statutory health insurance.

Best Practice

The mHealthBelgium platform aims to integrate mobile health applications into the Belgian healthcare system with the overall goal of fostering affordable and better care and enabling validated health apps to be reimbursed by the Belgian Social Security. This public-private initiative classifies CE-marked health applications according to a three-tiered system that centralizes information on digital health apps for patients, healthcare professionals and healthcare institutions to access on one single platform.

✓ **App integrated to Belgian healthcare**   ✓ **One single platform**

Conclusion

Startups continue to provide some of the most innovative telemedicine services. According to entrepreneurs, 70-80% of patients' medical inquiries can be addressed using telemedicine platforms. Telemedicine startups do not seek to replace traditional health care - instead, innovative solutions provide health professionals and patients with the right tools to increase efficiency, reduce waiting times and overcrowding, increase healthcare accessibility and cost-effectiveness.

Healthtech innovation in Spain has experienced an unprecedented push forward, but there is still work to be done. As smaller actors with access to often less resources, it is crucial to consider startup perspectives in policy and government. Shaping regulation with smaller actors in mind will not only improve the Spanish innovation ecosystem, but also drive Europe into a hub for digital health scale-ups. Empowering healthtech innovators in Spain rests in building a telemedicine framework coupled with a clear pathway for reimbursement. With the uptake of telehealth services throughout the pandemic, we look forward to seeing the permanent regulation of these life-changing solutions in Spain and beyond.

Interested to share your perspective in digital health or introduce a best practice in the HealthTech Charter for policy makers to understand what we need more of across Europe? Reach out to us here: we're keen to learn from you!

Get in touch with us

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