Health Cluster Portugal

Health Development Plan (2.0)

Innovation, Knowledge and Competitiveness

Executive Version

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Prepared for

EY Parthenon

PDS 2.0 aims for a knowledge-driven health ecosystem, powered by innovation and able to compete globally, creating value for citizens and for the country

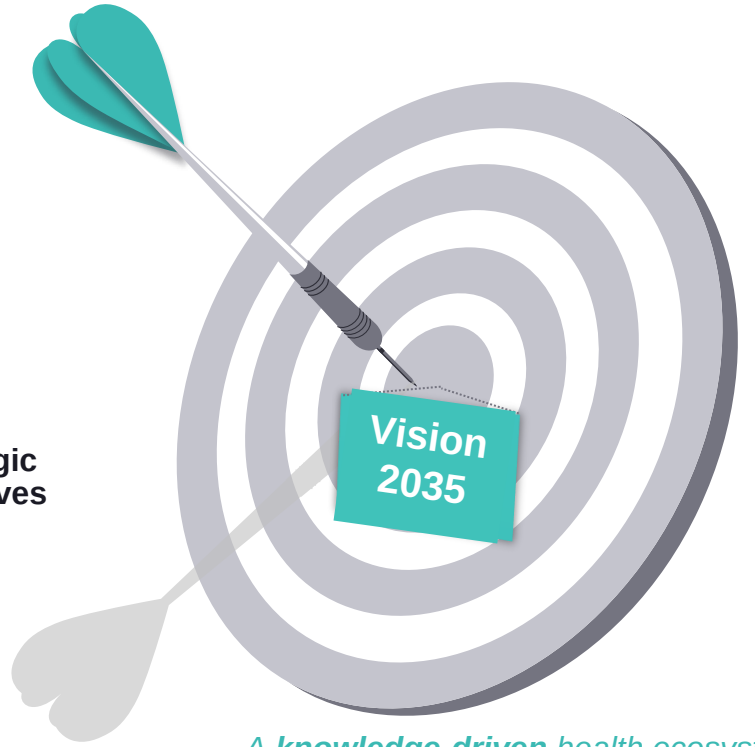
Strategic purposes and objectives, vision and transformation drivers

Strategic Purposes of the National Health Ecosystem

- Data as critical infrastructure of the health system
- More investment in transformative innovation
- Moving up the value chain to higher value-added segments
- Intensification of the internationalisation of the health sector

Strategic objectives

- **Accelerating innovation:** position Portugal at the forefront of technological and organisational transformations in health.
- **Collaborative culture:** foster a dynamic of cooperation between public, private, social and scientific institutions.
- **International attractiveness:** build a globally recognised image through the sector's new transformative values.
- **Sustainable competitiveness:** consolidate a more efficient, resilient and value-oriented health sector, grounded in the principles of sustainability.



*A **knowledge-driven** health ecosystem, **powered by innovation** and able to **compete globally**, creating **more value for citizens and for the country**.*

Transformation drivers

- Renewed and consolidated strategy for the Health System
- Structured cooperation between large companies (and other ecosystem actors)
- Business transformation and capacity building

PDS 2.0 will focus on 5 strategic axes aimed at leveraging the opportunities of the health ecosystem, with a 10-year implementation period

Strategic axes and their structuring initiatives

	Axis 1. Health data as a national priority	Axis 2. Innovative medicines and digital technologies	Axis 3. Resilience and value in the Health System	Axis 4. Knowledge valorisation	Axis 5. Market access
Strategic axes	Deliver an **integrated National Health Data Ecosystem**, based on **interoperability** between systems and collaboration between the public and private sectors, enabling the **secondary use of data** to support clinical artificial intelligence, personalised medicine, value-based health models, scientific innovation and informed decisions in the National Health System.	Promote **productive innovation** in **innovative medicines, Smart Health** and the development and **prescription of digital technologies**, while ensuring the **upskilling of health professionals** for the sector's digital and technological transformation.	Redesign the National Health System through **more integrated and value-oriented models**, involving different ecosystem stakeholders, promoting **digitalisation**, **prevention**, **data-driven management** and the strengthening of system resilience, as well as the incorporation of **ESG principles** (environmental, social and governance).	Transform scientific and clinical knowledge into economic and social value, positioning Portugal as a **competitive hub for the development of health products, services and solutions**, as well as for conducting **clinical trials** and biomedical research activities of high international relevance.	**Modernise regulation and market access mechanisms**, strengthening the role of regulators as strategic partners of innovation, promoting the **internationalisation** of Portuguese health and **accelerating the entry of new solutions** through instruments such as regulatory sandboxes and by creating conditions to speed up certification, strengthening the competitiveness of the National Health Ecosystem.
Initiatives	1. A strategy for Digital in Health 2. Secondary use of data for innovation, prediction and health policies	3. Innovative medicines 4. More investment and productive innovation in *Smart Health* 5. *Framework* for prescription and payment of digital solutions 6. Change management for innovation	7. A more preventive and citizen-centred Health System 8. Value-based Health System management 9. Environmental, social and governance (ESG) sustainability and resilience in Health	10. Portugal as a strategic platform for developing and attracting health innovation 11. Portugal as a *hub* for clinical research	12. National strategy for the internationalisation of the health sector 13. Regulators 5.0 14. Strengthening national certification capacity and regulatory access in *MedTech* and *Smart Health*

Each structuring initiative of PDS 2.0 is perfectly aligned with its respective axis, which will enable the success of the transformative strategy for the ecosystem

Structuring initiatives

1 Health data as a national priority	**IE 1** A strategy for Digital in Health	▪ Define and build consensus on a national digital health and data strategy, involving the public, private and social sectors under the coordination of a National Digital Health Agency.
	IE 2 Secondary use of data for innovation, prediction and health policies	▪ Consolidate a national data space that integrates, standardises and makes available multiple types of data, enabling their safe and ethically responsible secondary use for research, innovation, prediction and health policies.
2 Innovative medicines and digital technologies	**IE 3** Innovative medicines	▪ Boost active public policies to support highly differentiated business investment (national and international) in innovative medicines (chemical and biological) and to support the emergence of an international *hub* for innovation in *Pharma* in the country, as well as strengthen the capacity building and training of specialised human capital to ensure the sector's growth.
	IE 4 More investment and productive innovation in *Smart Health*	▪ Boost the business ecosystem in the *Smart Health* domain, promoting the growth of technology companies already established in Portugal and attracting investment from international companies, stimulating the emergence of an international innovation *hub* for this purpose.
	IE 5 *Framework* for prescription and payment of digital solutions	▪ Develop a regulatory and operational framework that enables the prescription of digital health technologies, including digital therapeutic applications, medical devices and other technological solutions, and that provides payment and reimbursement models for digital solutions.
	IE 6 Change management for innovation	▪ Integrate innovation into the ecosystem's organisational practices, through the implementation of structured change management mechanisms that promote the sustainable adoption of innovative solutions and by strengthening the digital skills of health sector professionals.

Legend: Priority structuring initiatives

Each structuring initiative of PDS 2.0 is perfectly aligned with its respective axis, which will enable the success of the transformative strategy for the ecosystem

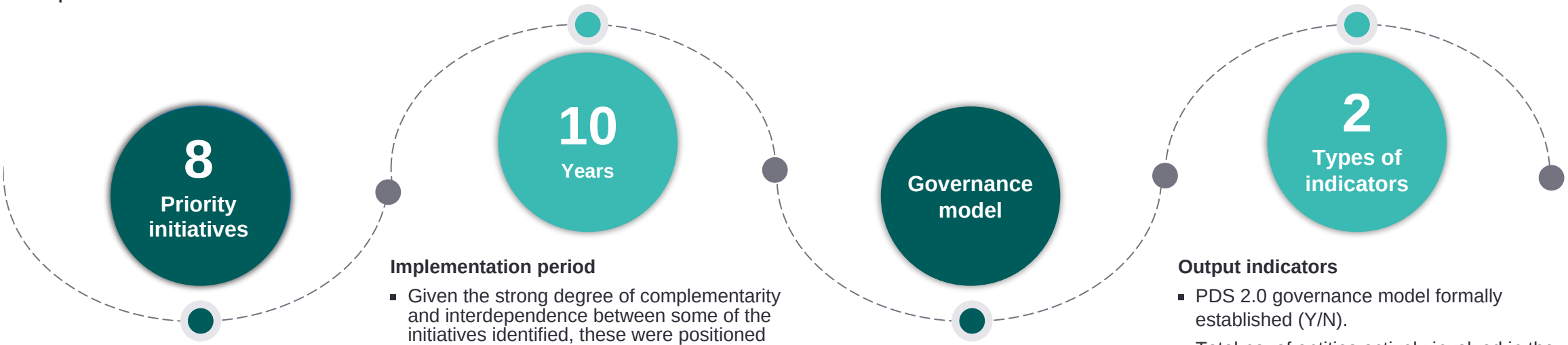
Structuring initiatives

3 Resilience and value in the Health System	**IE 7** A more preventive and citizen-centred Health System	▪ Strengthen prevention and health promotion, develop care delivery models that are truly citizen-centred and extend the boundaries of health with the consequent involvement of new actors, leveraging social prescribing models.
	IE 8 Value-based Health System management	▪ Integrate the systematic measurement of health outcomes and care costs into care assessment and funding models, enabling the evolution towards models based on value perceived and received by citizens.
	IE 9 Sustainability and environmental, social and governance (ESG) resilience in Health	▪ Integrate environmental, social and governance (ESG) principles into healthcare delivery and into the development of the sector's products and services.
4 Knowledge valorisation	**IE 10** Portugal as a strategic platform for developing and attracting health innovation	▪ Adopt *Health Business Portugal* as the national platform for aggregating knowledge and information on the innovation ecosystem in Portugal and designate it as the preferred partner in supporting the development of health products and services.
	IE 11 Portugal as a *hub* for clinical research	▪ Adopt *Portugal Clinical Studies* as the single national entry point for entities interested in sponsoring, participating in and conducting clinical studies in Portugal, as well as promoting the alignment of incentives in the area of clinical studies.
5 Market access	**IE 12** National strategy for the internationalisation of the health sector	▪ Develop a national strategy for the internationalisation of the health sector, strengthening the capacity of companies, in particular SMEs and startups, to access global markets and compete in international value chains.
	IE 13 Regulators 5.0 and Portugal as an international *test bed*	▪ Strategically modernise the health sector's regulatory framework and implement testing and experimentation environments for innovative processes, positioning Portugal as an international *test bed* for the development, validation and demonstration of digital health solutions.
	IE 14 Strengthening national certification capacity and regulatory access in *MedTech* and *Smart Health*	▪ Develop national capabilities that facilitate companies' access to certification and regulatory validation processes in the *MedTech* and *Smart Health* domains, reducing timelines, costs and barriers to the development and commercialisation of innovative technologies.

Legend: Priority structuring initiatives

The PDS 2.0 action plan should comprise a strong governance model, accompanied by output and result indicators

Action plan



Priority initiatives

- Considering the large number of structuring initiatives proposed, it became essential to carry out an exercise of prioritising initiatives.
- Although all the initiatives previously identified are considered structuring for the pursuit of the strategic objectives, the priority structuring initiatives occupy a central position in the operationalisation of this Health Development Plan.

Implementation period

- Given the strong degree of complementarity and interdependence between some of the initiatives identified, these were positioned on an execution timeline. The indicative execution period (10 years) took into account the current state of complementary practices, and the existence/maturity of the resources and knowledge required for their implementation.
- Given the structuring and complementary nature of the proposed initiatives, their operational and financial execution will, to a large extent, take place simultaneously.
- The phase of greatest operational and financial intensity will take place between 2026 and 2030, while from 2030 onwards activities to complete the initiatives will be carried out.

Governance model

- PDS 2.0 should be widely disseminated and owned by the entire National Health Ecosystem and should include a strong component of dynamisation, follow-up and monitoring.
- It is equally important to present PDS 2.0 to the Government, with the aim of framing its structuring initiatives within the country's development priorities.

Output indicators

- PDS 2.0 governance model formally established (Y/N).
- Total no. of entities actively involved in the implementation of PDS 2.0.
- % of structuring initiatives under execution.

Result / impact indicators

- Digital maturity / interoperability and data quality (simple index with 3–5 dimensions) to measure cross-cutting transformation.
- No. of solutions / innovations scaled in the system (technologies / services moving from pilot to regular adoption).
- No. of health exports influenced / facilitated by PDS 2.0.

Specific indicators were also defined for each axis / initiative *(which can be consulted in the full version of PDS 2.0).*

About HCP

The Health Cluster Portugal (HCP) is a private non-profit association that currently brings together over 240 members, including R&D institutions, universities, hospitals, organisations from civil society, and companies in the areas of pharmaceuticals, biotechnology, medical technologies, and services.

The Health Cluster Portugal's mission is to contribute to greater competitiveness in the national health value chain by enhancing the knowledge generated and available in universities, research institutes, hospitals and companies within a framework of economic and social development, sustainability and more and better health for all.

In this sense, its main objective is "Mobilize, aggregate and catalyze the health ecosystem in order to facilitate and accelerate its development, which involves:

- Enriching the interaction between its different actors – promoting collaborative practices in the national and international context;
- Identifying obstacles and opportunities – overcoming some and enhancing others by building innovative solutions, within a framework leveraged by its recognition and notoriety, seeking to contribute to greater generation of wealth, guaranteeing the sustainability of the entire system, aiming for more and better health for citizens".

The success of the Cluster is assessed by the performance of the health sector in the following measures:

- + health – gains for citizens and changes in the structure of the health system to better meet the challenges of the future;
- + knowledge – increase in qualifications (from vocational schools to doctorates), R&D in the sector, innovation, and collaboration between sub-sectors;
- + wealth – increase in GVA, exports, skilled employment, number of companies, and investment.

Contacts

Health Cluster Portugal

Lionesa Business Hub
Rua da Lionesa n.º 446, Loja K
4465-671 Leça do Balio, Portugal

+351 220 968 183

info@healthportugal.com
www.healthportugal.com