



**SHAPING FRANCE AS ONE OF THE MOST
COMPETITIVE, INNOVATIVE HEALTHTECH HUBS**



A FUTURE EUROPEAN LEADER IN HEALTHTECH

Ranked as a leader in terms of access to healthcare by OECD,
France's health sector has demonstrated its resilience during the Covid crisis.

In order to become a new global hub for health technologies, and the first European country for the production of new medicines, France needs to welcome more foreign investors.

€90 Bn turnover (French Health Industry Federation)
3rd largest export sector (worth €34 Bn)
€6.7 Bn annual investment in R&D
30,000 public researchers

**A unique social protection system guaranteeing 67M people
an easy access to healthcare and medicine.**

76.8% of reimbursement of health expenditures by the French universal health insurance
for people working or living in France
€200Bn public expenditures for Health





THE SECOND LARGEST PHARMACEUTICAL MARKET IN EUROPE

The world's 5th largest market for medicinal products for human use



An innovative public-private initiative bringing together the healthcare key players (companies, researchers, professionals, innovation clusters...) to promote their expertise, technologies and operations internationally

€60 bn generated by the French pharmaceutical companies in 2019 (Leem, 2020)
3,100 health companies employing 455,000 people

720 Biotech companies (oncology is the field they prioritize)
886 MedTech and Diagnostic (panorama France Biotech 2019)
60 new biotech companies created every year (Féfis)

Over 22,000 pharmacies
€488 consumed in average in France per year per capita in 2018 (Leem, 2019)





A COLLABORATIVE INNOVATION ECOSYSTEM

4 research centers listed in the Top 25 World's Most Innovative Research Institutions 2019

(Reuters)



Inserm

2nd leading medical research institute in the world (Scimago, 2018)

1st depositor of patents in biotechnologies and pharmaceuticals in Europe (EPO, 2018)

73 universities

(i.e. Université Paris-Saclay ranks 14 in Shanghai's Academic ranking of World Universities 2020)

13 Nobel prizes in Medicine (French Healthcare 2019)

52% of the healthtech companies created in France are spinout from public or academic research (France Biotech 2019)

800 M€ R&D tax credit per year for the health industry in France

1st European country in numbers of clinical trials (Panorama France Healthtech 2019)





DEVELOPING BIOPRODUCTION BY PROMOTING DISRUPTIVE TECHNOLOGY

“The production of innovative biological therapies is a major competitive stake but is also essential to guarantee better patient access to tomorrow's innovations and to guarantee our health independence.”
(Rapport Conseil National de l'Industrie, 2019)

32 bioproduction sites in France (with 3 international companies) representing 8,463 jobs.

France aims to :

- attract and develop disruptive technologies
- lower its bioproduction cost
- create a network of start-ups and SMEs
- reinforce its offer in training in new technologies

6 action plans (including bioproduction) led by the **CSF-ITS**
(Strategic Committee for the Health Industries
and Technologies Sector) among which :

- Artificial Intelligence and Health
- Antibioresistance
- Employment and training





DIGITAL HEALTH IS A GOVERNMENTAL PRIORITY

**A € 3Bn market with a potential of up to 16 to 22 Bn per year
(The Montaigne Institute, 2019) driven by :**

- **the aging of its population.** € 11 Bn for the long-term care for the elderly (+ 2% per year in recent years);
- **the development of chronic diseases**
- **the need to optimize the patient journey.** Transporting patients (€ 5 Bn/year) and nursing care in town (€ 8 Bn/year), both increasing by around 4%/year while consumption of hospital care (€ 72 Bn/year) is growing by 2%/year. (*rapport Potier 2019*)

THE FRENCH GOVERNMENT LAUNCHED SEVERAL INITIATIVES:

Health Data Hub

simplified access to health data for all professionals and research teams

Ma Santé 2022

fostering the transition to digital health, with tools such as shared medical

PIA4

(Investments for the Future Programme)
specific investments in digital health

“Engagé pour la e-santé”

a collaborative chart signed by 235 healthtech companies

Over **200** Digital health start-ups employing **30,000** people (*French Healthcare 2019*)





A STRATEGY TO ENHANCE COMPANIES' COMPETITIVENESS

SECURING THE VALUE CHAIN AND BOOSTING NEW INVESTMENTS

€600 M - Grants for new industrial projects in strategic areas **including health sector** (drugs, medical devices, diagnostics). Call for proposals in 2020, 2021 and 2022
Minimum base of eligible expenditure (Health sector) : €1M

BOOSTING INVESTMENTS TOWARDS INDUSTRY 4.0

September 2020 :

€240 M for industry 4.0 , including €40m in 2020

Industrial projects carried out by Small and Mid-Size Company

A new scheme to finance up to **40% of eligible equipment** (robotic equipment, physical sensors collecting data, augmented reality and virtual reality equipment, software or equipment using artificial intelligence) all for proposals in **2020, 2021 and 2022**

SUPPORTING PRIVATE AND PUBLIC RESEARCH

€25Bn - Additional **public investment in French research system** over the next 10 years, including **€5Bn in health sciences**

€300M - **Facilitated bridges between private and public research** through temporary placement (12 to 24 months) of private R&D personnel in public laboratories with 80% of the salary covered by the State

An attractive and stable **Research Tax Credit** (30% of annual R&D expenditures up to €100 M per company) ranking France **first among OECD countries for R&D funding** (2019)

ENCOURAGING THE DECARBONATION OF INDUSTRY

A budgetary envelope of 1,2Md€ including €200 M in 2020 – a new fund towards the decarbonation of industry

Grant for industrial companies purchasing **equipment to reduce CO2 emissions or improve energy efficiency.**

List of eligible expenditures [here](#)

Max grant (depending on the type of equipment): up to 30% of the eligible expenses for large companies ; up to 40% for mid-size companies ; up to 50% for SMEs





A STRATEGY TO ENHANCE COMPANIES' COMPETITIVENESS

ACCELERATING MARKET ACCESS FOR INNOVATIVE PRODUCTS

September 2020 :

Launch of **GIO**, "Guichet Innovation & Orientation" by the French National Agency for Health Products (ANSM), a new portal and support service to guide innovative companies through French legal procedures, **from R&D to marketing**.

Starting in 2021, a major simplification of the French early access scheme (**Temporary Authorization Process - ATU**) will **fast-track patient access to innovations** and give **more predictability** to companies.

MODERNIZING HEALTHCARE INFRASTRUCTURE

€6Bn - Transformation, renovation, equipment and digital remediation of medico-social establishments.

Restructuring the healthcare offer

Modernization of digital tools in healthcare





REGULATORY FRAMEWORK : A REGULAR AND CONSTRUCTIVE DIALOGUE BETWEEN THE STATE AND THE HEALTHCARE INDUSTRIES

STRATEGIC COUNCIL FOR THE HEALTHCARE INDUSTRIES (CSIS)

Next CSIS: July 2021

A unique **biennial forum** held since 2004 gathering **public decision-makers** and leaders of **French & international companies**

Common work agenda – Reciprocal commitments – New measures on the structuring points for the industry

8th CSIS held in July 2018: 48 new measures, **85% of which already effective** with tangible results:
Health Data Hub – Fast track for clinical trials –

Towards more competitiveness and predictability for international companies choosing France

MULTIYEAR REGULATORY FRAMEWORK AGREEMENTS

Principle of **contractual relationship State/Industry** –
a French characteristic appreciated by healthcare companies

Shaped by pluriannual **reference frameworks for the pricing and regulation of healthcare products** in France

Set between the **Pricing Committee (CEPS)** and **key industry representative bodies**
(LEEM for pharma / SNITEM for MTD)

Pharma: new agreement under negotiation – exp. by the end of 2020





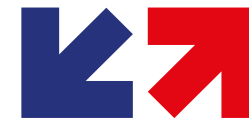
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