



**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**

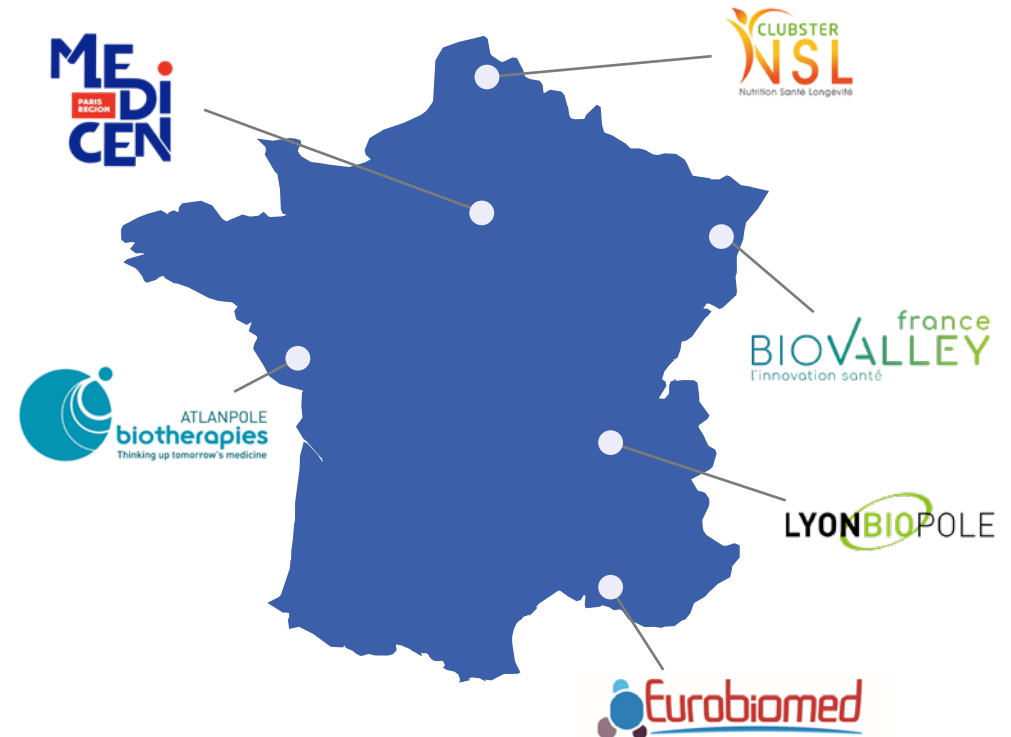
(i.e. Université Paris-Saclay ranks 14 in Shanghai's Academic ranking of World Universities 2020)

**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**





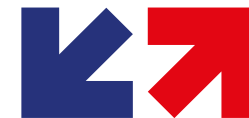
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