

SANTEXPO

ENTERING THE FRENCH HEALTHCARE MARKET - CRACKING THE CODE -

Moderator



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Case-Study



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Panel Speakers



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At SantExpo 2025, a clear shift was seen: French hospitals and clinics are actively seeking digitally enabled, sustainable, and clinically impactful solutions, but localisation, compliance, and trust was also demanded.

Sarah Jardine, CEO of Epipole, attended SantExpo 2025 and presented her portable retinal imaging device, offering a compelling example of Scottish innovation.

A panel of experts from across the ecosystem - procurement, legal, IP, distribution, sustainability, and investment - was designed specifically for Scottish medtech startups, like Epipole, looking to scale a medical device into the complex but rewarding French healthcare market.

The aim was to understand the 'why' and the 'how' of entering France successfully.

ENTRY INTO THE FRENCH MARKET FOR INNOVATIVE MEDICAL DEVICES

The roundtable began with introductions and a clear objective: to share practical insights and strategic advice for entering the French healthcare market, particularly for innovative medical device companies, like Epipole. Participants reflected on key takeaways from SantExpo 2025, where the growing role of AI in healthcare, the rising importance of sustainability, and the evolving structure of hospital

procurement, especially through Regional Hospital Groups (GHTs), were highlighted. The discussion explored both opportunities and challenges for foreign startups, including the expanding private hospital networks, the shift toward outpatient and home care, and the critical need for local partnerships and French-language support. Expert speakers provided targeted presentations covering legal frameworks, sustainability requirements, market access strategies, intellectual property protection, international business development, investment readiness, and distribution models.

Feedback from Scottish companies at SantExpo was overwhelmingly positive, with French stakeholders showing strong interest in Scottish products and a greater openness to innovation compared to the more rigid UK NHS system.



With: Sarah Jardine, Elisabeth Tedesco, Francis Mathé

Key Takeaways: · AI is ubiquitous · Sustainability is a key purchasing criterion · Public hospitals are centralising procurement · Success requires innovative solutions, local partnerships, and French-language support · The French market has lower entry barriers than expected.

MARKET ACCESS AND COMPLIANCE STRATEGIES FOR FOREIGN MEDTECH STARTUPS

The French healthcare market presents a complex and highly segmented landscape that requires careful strategic planning for successful entry. Startups must navigate intricate tendering procedures, where contracts typically span 3–4 years and are awarded per lot, often targeting large Regional Hospital Groups (GHTs), which can encompass anywhere from 6 to over 100 hospitals. Engaging local partners or distributors is essential, with the choice depending on the specific sector, be it pharmacies, care homes, or public versus private hospitals. The private sector, notably influential, includes around

1,000 clinics responsible for 55% of surgeries, largely dominated by Ramsay and Elsan, and operates through private group purchasing organizations (GPOs). Tender selection criteria are multifaceted, weighing price (30–70%), sustainability (10–15%), logistics, and product quality. Language and cultural fluency are critical, as French is mandatory for public documentation and consumer-facing materials, and cultural understanding can influence business relationships and tender outcomes. A robust market entry strategy should include SWOT analysis, market segmentation, pilot studies, and use case validation, alongside a competitive analysis to identify local differentiators and entry points. A French preference for domestic solutions can act as a tiebreaker in competitive tenders, underscoring the importance of local adaptation. Despite EU compliance,



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French-specific legal requirements—such as transparency laws, GDPR nuances under the “Loi Informatique et Libertés,” and anti-gift regulations—must be addressed. Practical compliance involves leveraging CNIL resources and seeking local legal counsel. Intellectual property (IP) strategy also plays a commercial role, ensuring brand uniqueness, investor confidence, and market alignment through localized protection of patents, trademarks, and trade secrets.

Key Takeaways: · Use a localised strategy tailored to French healthcare structures and laws · Customise bids by market segment and know key players · Build strong local presence with French-speaking reps and materials · Ensure bilingual, compliant, high-quality documentation · Leverage IP and competitive intelligence for credibility and differentiation.

FOREIGN STARTUP INTEGRATION IN THE FRENCH MARKET WITH FOCUS ON SUSTAINABILITY

Sustainability has become a central purchasing criterion in the French healthcare system, actively promoted by the Ministry of Health and now integrated into hospital accreditation processes, contributing between 3% and 15% of evaluation scores. Recent developments, such as the release of a new 30-point sustainability index by AFNOR on June 16, 2025,

underscore the urgency for companies to align with environmental standards. Key action areas include adopting low-emission transport solutions and leveraging recognized sustainability labels like PCOP and MED. For startups, especially those entering from the UK, France should be approached as a strategic “bonus” market—one that requires careful resource allocation and the involvement of local experts to navigate its unique dynamics.

French investors tend to operate within trust-based networks, contrasting with the more transactional approach of U.S.

family offices familiar with medtech. Therefore, building credibility through local champions—such as a potential advocate at SLR—and engaging with support organizations like Scottish Development International is crucial.

Key Takeaways: · Eco-friendly approach is already strong and regulatory trends support it · New sustainability index is free and public to help buyers compare devices · French investors favour trusted networks established over time.

CONCLUSION

In conclusion, while the French healthcare market offers significant opportunities for innovative Scottish MedTech startups, successful entry requires a structured, well-informed approach. Companies must clarify and follow concrete steps and timelines for market access, including understanding reimbursement pathways, eco-certification requirements (such as PCOP, MED, and the new AFNOR index), and the distinctions between public and private sector procurement. Selecting the right

local partners or distributors—based on clear criteria—and appointing a dedicated champion within influential organizations like SLR can greatly enhance market traction. Full regulatory compliance is non-negotiable; startups must address anti-gift laws, GDPR nuances, and IP protection before initiating any commercial activity. Failure to prepare adequately—such as submitting incomplete dossiers, lacking French translations, or entering without local support—can lead to costly delays or rejection. By mitigating these risks

and aligning with local expectations, Scottish startups can position themselves as credible, sustainable, and innovative partners in the evolving French healthcare landscape.

Dr Jean-Michel Verjus
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MODERATOR & SPEAKERS BIOGRAPHIES

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Co-Founder and Business Development Director at Digital Pharma Lab, Pascal leads one of Europe's premier digital-health innovation consultancies. He bridges healthcare professionals, pharma, startups, and institutions to shepherd cutting-edge digital transformation initiatives.

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Elisabeth Tedesco

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Elisabeth has most recently served as EMEA Business Development lead for Topcon Healthcare Europe, one of the leading companies in the Ophthalmology field. For over 20 years, she championed the deployment of imaging and Data Management/AI-driven diagnostic solutions across international markets.

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Cécile Théard-Jallu

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A Partner at De Gaulle Fleurance, Cécile is a renowned expert in digital health law, life sciences, data privacy, cybersecurity and innovation contracts. Past Co-Chair and member of the Advisory Board of the International Bar Association's Healthcare & Life Sciences Law Committee.

Among other topics, she advises on GDPR euro-certifications, AI & sustainability in health, and cross-border R&D&I or commercial frameworks.

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Sarah Jardine

(Epipole)

Sarah Jardine is CEO of Epipole, a Scottish medtech company pioneering portable retinal imaging technology. With a strong background in life sciences leadership, she offers valuable insights into scaling innovation and entering new international healthcare markets.

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With an MBA and a background in business intelligence, Eric leads sales and strategic growth at EFFIPERF Health. He partners with healthcare companies to drive their development by combining strategic vision, operational excellence, and intelligence-driven decision-making to accelerate sustainable and profitable growth.

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David Monin

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David Monin is a European Patent Attorney at ICOSA, specializing in MedTech. With a background in theoretical physics and material science, he advises on patent strategy, drafting, prosecution, and legal opinions for innovative healthcare technologies.

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Alexis Bruhat

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Alexis Bruhat is an expert in medtech innovation and market access. After co-leading Mount Sinai's BioDesign team and launching licensed products in the U.S., he now supports French market entry via Digital Medical Hub (DMH), Waymed, and a medtech investment structure in partnership with Meeschaert.

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Véronique Molières

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Director of C2DS (Comité pour le Développement Durable en Santé), Véronique leads efforts to embed sustainability and biodiversity protection in French healthcare. She coordinates environmental recommendations for hospitals and engages healthcare institutions to pursue responsible development.

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