

CONNECTED
HEALTHCARE



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2020

1

A LARGE MARKET AND POTENTIAL TO EXPLOIT

The e-health market was estimated to be worth €4 billion in 2020 and could generate €16-€22 billion per year in efficiency savings, split between patient empowerment (€3.3-4.7 billion), dematerialization and data exchange (€3.4-4.7 billion), telemedicine (€3.7-5.4 billion), automatization of procedures (€2.3-3.4 billion), as well as transparency and decision-making aid (€3.3-4.2 billion). (Institut Montaigne)

2

E-HEALTH STARTUPS INVEST IN R&D

E-health businesses are on average allocating 45% of their expenditure and more than one-third (37%) of their workforce to R&D. They are designing and developing connected devices, biosensors and tools for telemonitoring patients and digital diagnostics for chronic illnesses (heart, kidney or respiratory failure, diabetes, etc.). (France Biotech)

3

INNOVATION, FRENCH STYLE

BioSerenity produces smart clothing enabling chronic illnesses to be diagnosed over a telemedicine platform; Primaas has developed artificial intelligence software that can recognize different types of cancer from digital sample slides, which are compared with millions of images in their innovative database. (BioSerenity; Primaas)

4

EXPERTISE THAT SELLS OVERSEAS

France has expertise in the design and construction of digital hospitals with an offer of optimized and ongoing digital care, which is now being exported to the Hanoi university hospital center (Vietnam), healthcare modernization plan (Morocco), mother and child center in Zhuhai (China), Cleveland Clinic (United Arab Emirates), among others. (Association FHC)

5

ARTIFICIAL INTELLIGENCE SERVING HEALTHCARE

In 2019, 80% of digital healthcare businesses and 71% of diagnostic companies declared they had used artificial intelligence (AI) and big data in their work (France Biotech). Founded in 2016, the French startup Implicity is using AI to improve the efficiency of cardiac monitoring surveillance, making the work of electrophysiologists more optimal. While Incepto, founded in 2018, uses applications to help radiologists interpret more quickly and effectively scans of complex diseases, such as cancer, cardio-vascular and neurodegenerative disease. (Implicity; Incepto)

6 STARTUPS SHINE IN LAS VEGAS

The connected watch ScanWatch by Withings, which can diagnose sleeping disorders, received three innovation awards at the Consumer Electronics Show 2020. The startup Moon is offering remote surveillance for diabetic patients, while MyEndoApp enables screening and follow-up for endometriosis. (French Web)

7 MAJOR FUNDRAISING

Doctolib carried out the second largest fundraising round in 2019 (€150 million), while BioSerenity raised €50 million to develop activities and make a place for itself in the international market. Lifen, which is developing a message platform bringing patients, doctors and healthcare professionals together, completed a €20 million funding round.

8 POLITICAL WILL FOR DIGITAL HEALTHCARE

The national strategy “Ma santé 2022” defines five approaches to accelerate the digital healthcare revolution. In addition to the digitalization of social security cards, it plans a digital health space for each user, making a package of digital daily services available for professionals, as well as creating a Health Data Hub to analyze health data and improve decision-making. (Ministry for Solidarity and Health)

9 LARGE SAVINGS IN TREATING CHRONIC ILLNESSES

The deployment of teleconsultation, remote surveillance and tele-expertise in the social security reimbursement system will save €322 million per year in the management of high blood pressure (or 14% of expenditure related to this disease), €26.3 million for prostate cancer (21%) and €8 million for diabetic retinopathy (9%). (LEEM)

10 E-HEALTH IN THE FIGHT AGAINST COVID-19

As part of the Covid-19 pandemic management, resorting to teleconsulting limited congestion in hospitals and helped anticipate patient flows. As such, at the height of the crisis, the average weekly number of teleconsultations reached nearly one million, or 27% of all consultations, against less than 1% before. (Institut Montaigne; Ameli)



#2

WORLDWIDE

for the number of clinical trials in gene therapy and oncology



13

NOBEL PRIZES

in medicine and nearly 130 cancer research projects



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(INSTITUT MONTAIGNE; AMELI)



The e-health market could generate **€16-€22 billion** per year in efficiency savings

(INSTITUT MONTAIGNE)

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