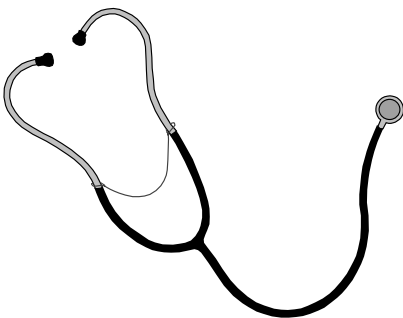
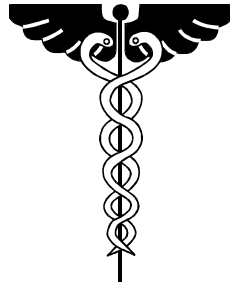


THE FRENCH HEALTHCARE SECTOR



Produced by:

Antonio Soraru – Commercial Officer
Clément Thiébault – Trade Sector Promoter
Josée Couvelaère – Statistician
Charlotte Monrose – Trade Sector Promoter
Commercial Section
British Embassy – Paris
35, rue du Faubourg St-Honoré
75008 Paris - France
Tel: 01 44 51 32 74
Fax: 01 44 51 44 01
Antonio.Soraru@fco.gov.uk
Clement.Thiebault@fco.gov.uk

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Whereas every effort has been made to ensure that the information given in this report is accurate, the Department and British Trade International and its sponsoring Departments accept no responsibility for any errors, omissions or misleading statements in that information and no responsibility is accepted as to the standing of any firm, company or individual mentioned.

MEDICAL CONSUMPTION IN FRANCE

- According to the Ministry of Health (DREES – Comptes Nationaux de la Santé 2002), **total French medical consumption was €138.8 billion in 2002.**
- The growth rate of total medical consumption was higher in 2002 (6.3%) than in 2001 (5.7%).
- Expenditure in 2002 was equivalent to 10.4% of GDP (compared to 10.1% in 2001), and 12.9% of total household consumption.

Healthcare was the fastest growing area in the national budget between 1980 and 1996. However, healthcare spending has slowed down significantly since 1993: the average annual growth rate between 1995 and 1997 was 4.1%, compared to 7.6% between 1985 and 1990, and 13.6% between 1980 and 1985. The rise in healthcare consumption is linked to the increase in the standard of living and to demographic ageing.

- Medical consumption is divided between:

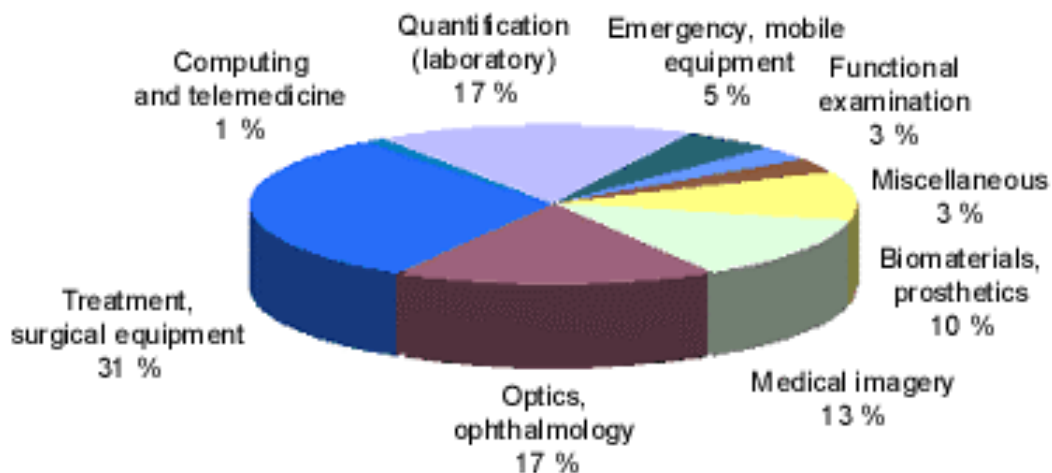
Hospital care	43.8% of which:	35% in public hospitals 8.8% in private hospitals
Ambulatory care (doctors, dentists, medical auxiliaries, laboratory tests)	26.1%	
Drugs	20.6%	
Optics, prostheses and small medical instruments	5.8%	
Preventive medicine	2.1%	
Patients transport	1.6%	

- The sources of demand for medical products are:
 - **public hospitals: 70%**, with about 50% of their expenditure on medical technologies
 - private clinics: 20%
 - doctors, dentists, nurses, households: 10%

THE MARKET FOR MEDICAL AND SURGICAL EQUIPMENT AND PRODUCTS

1. Market facts and figures

- According to the main French trade federation statistics (SNITEM), the world market for medical technologies is worth some €100 billion, with an annual growth rate of 8%. **France is the fourth most important market in the medical sector, worth €5 billion in 2002, i.e. 4.5 % of the world market**, after the United States (41.2%), Japan (18%) and Germany (11%). Big multinational companies are the major players in this sector.
- The French medical industry employs 20,000 people and exports 25 % of its turnover. 80 % of companies in the sector export overseas. In 2000 there were 1,500 companies in the medical sector, half of which are subsidiaries of multinationals such as 3 M, Johnson & Johnson or Smith & Nephew. 230 firms had more than 20 employees.
- The French market for these products includes large equipment, high tech for operating theatres, diagnostic equipment (electrocardiographs, electroencephalographs and laboratory equipment), medical and surgical furniture, prostheses (e.g. dental) and all disposable products.



French market: €5 billion

Source: SNITEM

- The best sales prospects for medical equipment include newly developed areas such as non-invasive surgery, orthopaedic and disposable medical equipment. Healthcare professionals are highly optimistic about new technologies such as telemedicine, which is expected to have a major impact on medical care institutions.

2. Trade Federations in the medical technology sector

Nearly 500 manufacturers of medical technology equipment are members of French federations, as follows:

- SNITEM (Syndicat National de l'Industrie des Technologies Médicales) 200 members - 20,000 staff - Turnover : €4.25 billion (85% of sector total turnover)
- APPAMED (Groupement pour Accessoires, Pansements, Petit Appareillage à Usage Médical) : 55 members – 4,000 staff - Turnover : €850 million
- SFRL (Syndicat de l'Industrie du Diagnostic in Vitro) : 64 members
- SIFADENT (Syndicat des Industries Françaises pour l'Art Dentaire) : 30 members
- GIFO (Groupement des Industries Françaises de l'Optique) : 30 members

USDIFAMED (Union Syndicale des Distributeurs de Fauteuils Roulants et d'Appareils Médicaux), UNPDM (Union Nationale des Prestataires de Dispositifs Médicaux), UFOP (Union Française des OrthoProthésistes), CIFL (Comité Interprofessionnel des Fournisseurs du Laboratoire), FABRILABO (Chambre syndicale des Fabricants et négociants d'appareils de Laboratoire) are the other major French federations in the medical sector.

- Expenditure on research and development amounts to nearly 7% of the turnover of the sector, and represents 8 to 15% of the budget of major companies. Research is carried out by specialist organisations such as INSERM (Institut National de la Santé et de la Recherche Médicale), CNRS (Centre National de la Recherche Scientifique), universities, and public hospitals (CHU - Centre Hospitalier Universitaire).

TECHNICAL REQUIREMENTS: RULES AND REGULATIONS FOR MEDICAL AND LABORATORY EQUIPMENT

1. European Approval (CE Mark)

- Since the European Medical Device Directive 93/42 of 14 June 1993, which was put into practice in France in January 1998, all medical and surgical products must have the CE Mark.

For most medical equipment, the former national type-testing procedure (homologation) has been phased out in favour of the European Approval Mark (CE Mark) as a result of this European Directive. The homologation procedures no longer apply since 14 June 1998, with the exception of very specific products such as nebulisers.

Products with the European approval (CE Mark) can be marketed throughout the EU without the need for local approvals. The company must have a representative in Europe in order to benefit from the CE Mark. The CE Mark only indicates that the product has been produced according to an approved quality system and conforms to applicable standards.

2. Obtaining the CE Mark in Britain

- To obtain the European Mark, companies are advised to apply in the United Kingdom, as it is likely to be faster and cheaper than with the French authorities. The CE Mark can be obtained in the UK from most official "Notified Bodies" and several consulting companies including:

B.S.I. PRODUCT CERTIFICATION (BRITISH STANDARDS INSTITUTION)

Mayland's Avenue
Hemel
Hempstead HP2 45Q
Tel: 01442 278 607 (BSI Product Services)
Fax: 01442 278 575
Web: www.bsi-global.com

All medical devices; BSI is the only British Notified body which is significantly known in France.

AMTAC CERTIFICATION SERVICES LTD

Norman Road
Broadheath
Altrincham
Cheshire WA14 4EP
Tel: 0161 928 8924
Fax: 0161 927 7359
E-mail: admin@amtac.co.uk

Web: www.amtac.co.uk
Contact: Mrs Eileen HURST – Administration

BUREAU VERITAS QUALITY INTERNATIONAL LTD

Tower Bridge Court
224 - 226 Tower Bridge Road
London SE1 2TX
Tel: 020 7550 8900
Fax 020 7403 1590
Web: www.bureauveritas.co.uk

All active medical devices, sterile single use medical devices, wound dressings, orthopaedic implants, dental materials and implants, sutures, contact lenses and lens care products.

INTERTEK TESTING SERVICES UK LTD

ITS House
Cleeve Road
Leatherhead
Surrey KT22 7SP
Tel: 01372 370 900
Fax: .01372 370 999
Web: www.intertek.com

Active medical devices, excluding blood gas analysers, anaesthesia machines, lung ventilators, respiratory therapy and breathing systems.

NATIONAL QUALITY ASSURANCE LTD

UK HEAD OFFICE
Warwick House, Houghton Hall Park, Houghton Regis, Dunstable, Beds LU5 5ZX, UK
Tel: 01582 539000
Fax: 01582 539090
E-mail: enquiries@nqa.com
Web: www.nqa.com

Drainage and suction devices (non-powered), surgical dressings, electromedical equipment, measuring and monitoring equipment, operating theatre equipment, diagnostic X-ray equipment, anaesthetic and respiratory equipment.

SGS YARSLEY INTERNATIONAL CERTIFICATION SERVICES LTD

Unit 202 B
Worle Parkway
Weston-Super-Mare
North Somerset BS22 0WA
Tel: 01934 522 917
Fax: 01934 522 137
E-mail: chris_jepson@sgs.com
Web: www.sgs.com / www.uk.sgs.com

All medical devices.

3. Obtaining the CE Mark in France

- The single body nominated by French authorities to the European Commission for implementing the European Medical Devices Directive is:

G-MED (Groupement pour l'Evaluation des Dispositifs Médicaux)

1 rue Gaston Boissier
75724 PARIS CEDEX 15
Tél: +33 (0)1 40 43 37 00
Fax: +33 (0)1 40 43 37 37
Contact: M. Bernard LAMBERT
E-mail: bernard.lambert@gmed.fr
Web: www.gmed.fr

G-Med was created in May 1994, then modified in January 1998, as a public industrial partnership regrouping the French National Testing Laboratory (LNE – Laboratoire National d'Essais) and the French Central Laboratory for Electrical Industries (LCIE – Laboratoire Central des Industries Electriques). G-Med covers all kinds of medical devices.

The French procedures will depend on the class the medical device will fall under. They can take between 1 month (for Class I) and 18 months and can cost between €760 (for Class I) and €38,000 per product. G-Med welcomes correspondence in English.

- Other bodies such as APAVE can also give some CE certification, in particular for the structures of large electrical medical equipment, but G-Med will then be contacted as a further step to have CE Mark in full.

4. Technical requirements

European rules and legislation state that all electronic and electrical products sold in France must have their technical data-sheet, instructions, installation and programming manuals translated into French before the product can be sold in France. For complex devices with accessories and/or controlling software, there can be differences between the Notified Bodies in the contents of the technical dossiers to be submitted.

5. NF-Médical, the voluntary certification mark in France

NF-Médical (NF means "Normes Françaises", French Standards) is the principal voluntary certification mark in France. Although there is officially no obligation for any medical product or equipment to bear the NF mark, this can be a major asset in the purchasing process, especially for hospitals. Again, G-Med is the only organisation that can administer this voluntary certification mark.

6. Other requirements

CE marking through G-med is separate from (and takes place prior to) the French administrative authorisation required under the "Carte Sanitaire" for specific hospital equipment. Most medical equipment and products must be evaluated by each individual purchaser to establish quality, performance and cost data before purchasing. Reimbursement approvals and pricing approvals may also be needed.

THE FRENCH PHARMACEUTICAL SECTOR

1. The French pharmaceutical industry

- The total world market for pharmaceutical products was worth some US\$350 billion in 2000. North America (43%), Japan (15%) and Europe (21%) account for 79% of the world market but for only 15% of the world population. Germany and France are the largest European markets.
- In 2002, according to INSEE and DREES, pharmaceuticals retail reached a **turnover of €27 billion in France**.
- According to the LEEM ("Les Entreprises du Médicament", main trade association), in 2001 the five top pharmaceutical groups in France took 24.1% of the market, and the leading 20 companies took 57.8% of the market. There were 300 laboratories employing 96,300 people.
- Pharmaceutical companies are more and more affected by specific taxes:
(in € million)

	Specific taxes on drugs ⁽¹⁾	Contributions ⁽²⁾	Total specific taxes	Ratio of total specific taxes on taxable sales ⁽³⁾
1999	328	143	472	3.2%
2000	344	457	801	5%
2001	362	543	905	5.2%
2002	423	210	633	3.4%

⁽¹⁾ Taxes on advertising increased by 25% because they are not deductible, on direct sales and on specialties

⁽²⁾ 1998: Aubry contribution, 1999-2000 : equivalent to the "Safeguard Clause"

⁽³⁾ Taxable sales reimbursable and hospital sales

(Source: LEEM Key Facts 2002)

- Main therapeutic classes in 2002 (as a % of the world market)

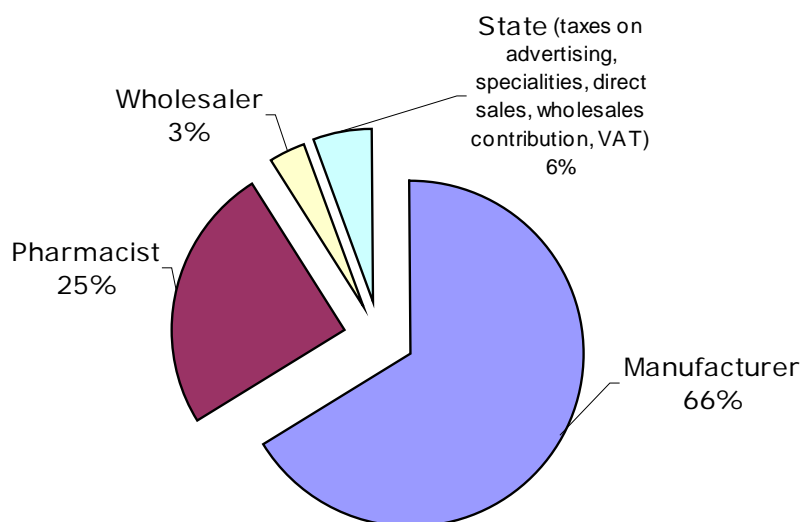
Anti-ulcers	6%	ACE-inhibitors (plain)	2%
Cholesterol & Triglyceride reducers	5%	Cephalosporins & combinations	2%
Antidepressants	4%	Non-narcotic analgesics	2%
Calcium antags (plain)	3%	Antipsychotics	2%
NSAIs	3%	Oral antidiabetics	2%

- In 2000, expenditure on Research and Development was €3.4 billion, i.e. 12% of the total turnover. The number of people working in pharmaceutical research has tripled in the past 20 years; in 2000, they were 18,227. This expenditure is financed by the companies themselves.

2. French pharmaceutical consumption

- According to DREES, the French total drugs consumption was €28.6 billion in 2002 (i.e. €467 per individual).

Average breakdown turnover at market price of reimbursable medicines sold by French pharmacists in 2002



Source: LEEM

- Since the introduction of the CMU (Couverture Maladie Universelle) social scheme in January 2000, 11% of the total French population are entitled to 100% refunds for all medical care, as opposed to 8-9% in the past.
- In 1999 the proportion of drugs expenditure without any patient contribution was 33%. In 2000 the total Social Security refund cost was €79.4 billion of which 53.4% was hospitalisation, 14.6% dental and medical fees, 15.5% drugs, 11.2% for laboratory analysis, transport, optical and orthopaedic treatments; and 5.3% for benefits in cash.

3. Rules and regulations

- In France, no medicine or drug may be sold unless the product has received specific marketing authorisation, the "Autorisation de Mise sur le Marché" (A.M.M.) from the "AFSSAPS" (see next page), a department of the Ministry of Health. The AMM has to justify the product's therapeutic value, quality and innocuousness.

- Under Article L511 of the Public Health Act, "All products which present preventative or curative capabilities of human or animal diseases, and all products which may be given to human or animals with a view to establishing a medical diagnosis to restore or modify their organic function" must have an A.M.M.
- These regulations also apply to cosmetic and hygiene products in order to avoid dermatological problems. Article L658-2 and L658-7 of the Public Health Code covers oils, gels, emulsions, creams and lotions for the skin.
- Depending on the type of products to be tested, the A.M.M. can take between 12 to 48 months, in some cases even longer, e.g., if the product is totally new. The cost varies between €20,000 and €45,000.
- 632 drugs received an A.M.M. in 2001.
- 4,750 pharmaceutical specialities, i.e. around 8,540 presentations, were marketed in France in 2002.
- Further information can be obtained from:

AFSSAPS

(AGENCE FRANCAISE DE SECURITE SANITAIRE DES PRODUITS DE SANTE)

143-145 Boulevard Anatole France

93285 SAINT DENIS Cedex

Tel: 01 55 87 30 00

Fax: 01 55 87 30 82

Web: <http://www.afssaps.sante.fr>

Contact: Mme DENIAU – International Cases Manager

- Pharmaceuticals produced in the UK can now also receive the EU authorisation for all European countries in London, from:

EMEA (THE EUROPEAN AGENCY FOR THE EVALUATION OF MEDICINAL PRODUCTS)

7 Westferry Circus

Canary Wharf

LONDON E14 4HB

Tel: 0207 418 8400

Fax: 0207 418 8416

E-mail: mail@emea.eu.int or thomas.lonngren@emea.eu.int

Web: www.emea.eu.int

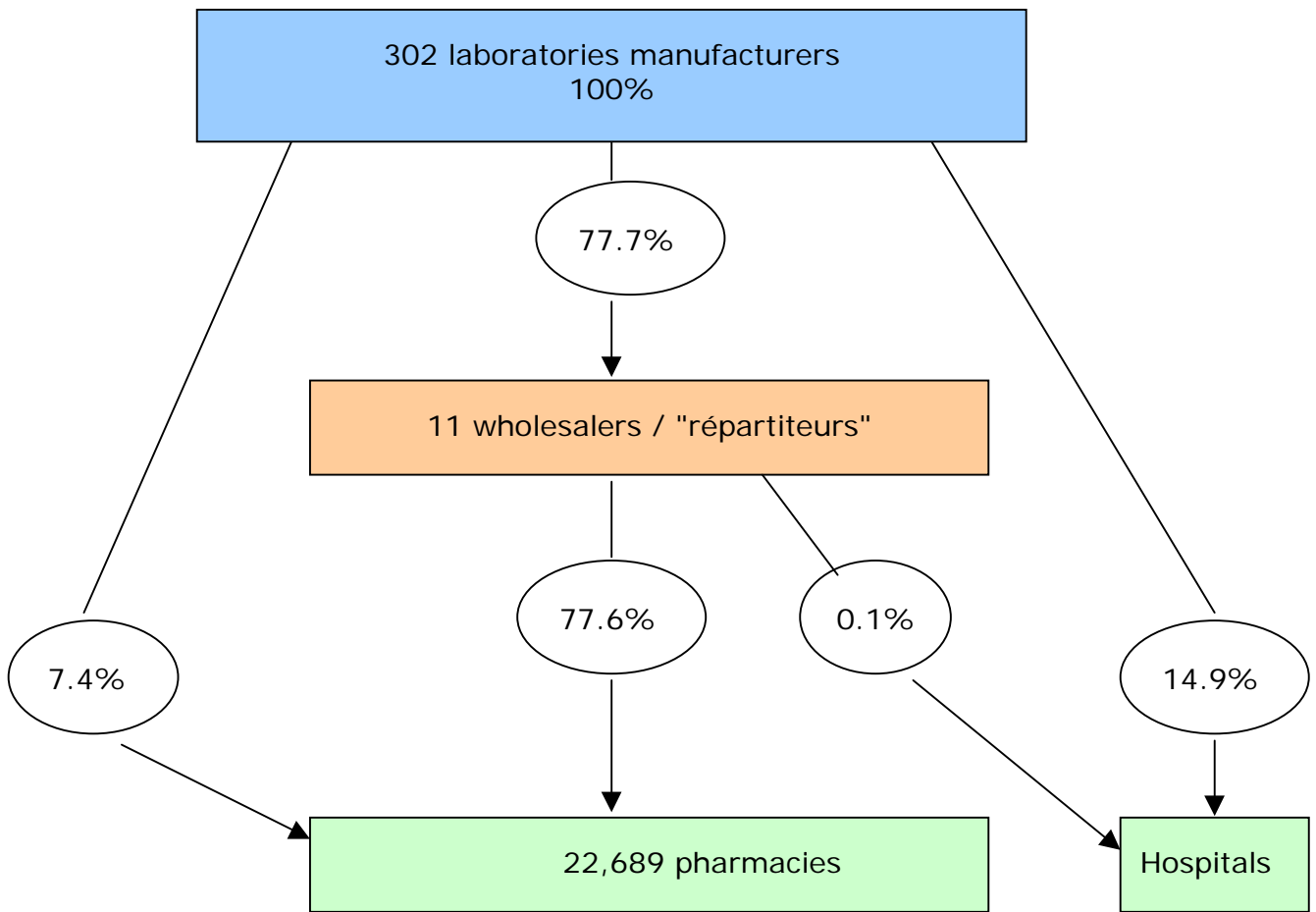
Contacts: Dr Thomas LÖNNINGREN – Executive Director

M. Miguel BLEY – AFSSAPS Representative at EMEA

4. Distribution

- Medicines in France are distributed on a specific circuit with wholesalers and pharmaceutical agents. The "répartition" is supervised by the Ministry of Health and provides a public service. As 75% of pharmaceutical products are sold less often than once a month, this distribution network offers a large range of pharmaceutical products with short delivery times and simplifies relations between the pharmacists and suppliers, while still permitting commercial competition between laboratories. At the same time it optimises access to pharmaceuticals for the 60 million potential patients.

French pharmaceutical distribution



(Source: CRSP)

Direct sales by pharmaceutical laboratories account for 7.4 % of the total sales of pharmaceutical products to pharmacies, mainly parapharmacy (non-drug) products, whereas 14.9% of the sales of pharmaceuticals are direct sales from the manufacturer to the hospitals.

- The wholesale ("répartition") sector is very concentrated. Three major wholesalers ("répartiteurs") and 8 others are responsible for 77.7% of total distribution of pharmaceutical products through 194 establishments covering the whole of France. They must be pharmacists and have an obligation of public service to distribute products within 24 hours to the 22,689 chemists' retailers and to 3,052 hospitals and clinics.
- The pharmaceutical distribution network is linked by computer and each distributor permanently manages and stocks 20,000 references including approximately 7,300 pharmaceutical specialities.

5. Procedures for creation of a chemist outlet in France

- The French pharmaceutical sector comes under the direct control of the Ministry of Health, and the central governmental administrator in each department or region. The French "Code de la Santé Publique", i.e. French Public Healthcare legislation, states that "only E.U. citizens, with a degree in pharmacy obtained from a French university, will be eligible for ownership or the creation of a new chemist shop".
- The creation of a new chemist shop is based on the number of inhabitants living in a specific area. The average ratio is one chemist shop per 2,000-3,000 inhabitants. This will depend on the total number of outlets already established and the total population in that particular region or département.
- Applications from companies or individuals must be addressed to the "Préfet du Territoire". Each case will be analysed by a number of official organisations, including regional bodies and the Order of Pharmaceutical Industry Inspectors. These bodies decide whether applications should be approved or rejected.
- After the official "Autorisation Préfectorale" has issued, a company may be created under normal French procedures.

6. "Rachats" (purchase of an existing pharmacy)

- Purchases of existing chemists' shops will depend on turnover, number of employees, size of premises and whether or not situated in the centre of town or in the suburbs.
- Any EU citizen holding a recognised pharmacist's diploma may purchase an existing chemist shop. The procedure to follow in this case is as above, but applications may be processed much more quickly.

Advice and specialised information can be obtained from:

Ordre National des Pharmaciens

4, avenue Ruysdael

75008 PARIS

Tel: 01 40 53 74 00

Fax: 01 44 40 40 90

Web: www.ordre.pharmacien.fr

67,937 pharmacists were registered on 1 January 2003.

7. Trade fair

A pharmaceutical fair, "**PHARMAGORA**", is held annually in Paris. The next exhibition will be in Paris Expo, Porte de Versailles, March 2005. Details are available from the organiser:

GROUPE LIAISONS

1 avenue Edouard Belin

92856 RUEIL MALMAISON CEDEX

Tel: 01 41 29 96 17

Email: info@pharmagora.com

Fax: 01 41 29 97 57

Web: www.pharmagora.com

Contact: M. Thierry MARANGE – Commissaire Général (Trade Fair Manager)

8. Trade federation

- The official representative federation for the pharmaceutical sector is:

LEEM (Les Entreprises du Médicament)

88, rue de la Faisanderie

75016 PARIS

Tel: 01 45 03 88 88

Direction de la Communication et des Relations Extérieures (External Communication Management): dcre@leem.org

Web: www.leem.org

9. Other useful websites

www.aipef.com

where you can find the list of telephone and fax numbers of French pharmaceutical laboratories

www.pharmup.com

where you can find the list of French pharmaceutical wholesalers/"répartiteurs", lists of companies by products along with a lot of other useful information.

THE FRENCH DENTISTRY SECTOR

1. The French Dental Market

- According to DREES (Comptes Nationaux de la Santé 2002), **the French dental care market was worth € 7.6 billion in 2002**. Compared to 2001, consumption has grown by 5.6% in value.
- The sector is characterised by very strong international competition from other developed countries. Major suppliers are Germany, followed by the USA, Italy, Scandinavia, Japan and Switzerland.

2. Distribution of Dental Products

- There are 40,100 qualified dentists in France, of which less than 39,000 actually practice. 98% of French dentists work in their own surgery.
- There are 100 to 120 important distributors of dental equipment in France, although this number can reach 200 companies if after-sales service providers are included. The distribution market has been reasonably steady in terms of volume for the last few years.
- 50% of the distribution of dental instruments and appliances is handled in the traditional way through importers, distributors, wholesalers and commercial agents. 40% of distribution is taken by mail-order companies and 8% by direct purchasing in France and the remaining 2% is directly bought abroad.

3. Trade Fair

The major event in the dental sector in France is the "Congrès de l'ADF" (Association Dentaire Française / French Dental Association), due to be held from 24 to 27 November 2004 in Palais des Congrès, Porte Maillot, Paris. It is an international annual dental technology show, which has replaced the biennial trade fair SITAD.

Details are available from the organisers:

ADF

7 rue Mariotte
75017 PARIS
Tel: 01 58 22 17 10
Fax: 01 58 22 17 40
E-mail: adf@adf.asso.fr
Web: www.adf.asso.fr
General Manager: Dr Christian LEMAUR

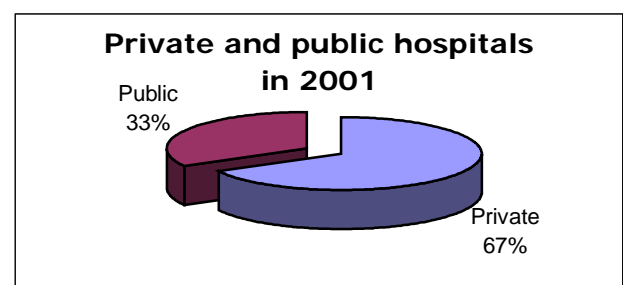
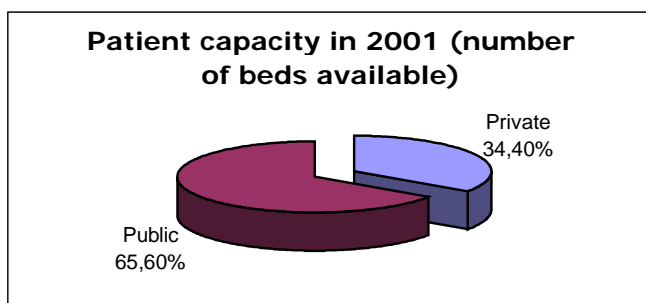
COMIDENT

8 rue Blanche
75009 PARIS
Tel: 01 48 74 11 08
Fax: 01 42 85 20 32
E-mail: comident@worldnet.fr
Web: www.comident.asso.fr
Director: Mr Bernard FILERE

STRUCTURE OF HOSPITALS: PUBLIC AND PRIVATE SECTORS

1. Organisation and Administration of Hospitals

- The cost of a standard operating theatre in a general hospital is €2.3 million, whereas French hospitals can only invest 4% of their functioning budget in medical devices. This leads to an unacceptably low French level of high-tech medical equipment (IRM, TEP for instance).
- Hospitals in the private sector are funded by the "Daily price" (daily subsidy determined by the Social Security: a variable price depending on type of illness). Although management of hospitals is autonomous, the Ministry of Health keeps a large degree of control in both sectors, through its specialised division, now called DHOS (Direction des Hôpitaux et de l'Organisation des Soins). A French citizen has the complete freedom of choice, funds permitting, of being treated in either sector.
- **In 2001** (Source: SAE, DREES), **the private sector included 2,042 hospitals** (67% of the 3,052 hospitals in France), but had only 34.4% of patient capacity with 162,306 beds. **There were 1,010 hospitals** (33%) **in the public sector** but these accounted for 65.6 % of the total capacity with 309,047 beds, out of the total of 471,353 beds.



(Source: SAE, DREES)

- Hospitals employed over 888,653 full-time staff, i.e. 3.3% of the active population in 2002. These are split between the public (670,826) and the private (217,827) sectors.
- In some large urban areas hospitals are grouped under regional hospital boards for administrative purposes. In the Paris region in 2000, the public hospital group "Assistance Publique - Hôpitaux de Paris" (A.P.- H.P.) managed 24,977 beds in 39 hospitals, employing 90,658 staff. A.P.- H.P. is the largest group in France.
- A.P.- H.P. has conducted a major project, with the opening of the Georges Pompidou European Hospital in the first semester 2000. This hospital provides general hospital services, such as intensive care, as well as specialised hospital services such as AIDS treatment, orthopaedic surgery and trauma care. It is also affiliated to a local university.

Reform is underway within hospitals concerning the number of beds available for short-and long-stays. The tendency is toward a decline in the number and duration of short-stays and an increase in number and duration of long-stays. Due to technological advances, patients who would previously have treatment requiring a few days stay at the hospital can now return home earlier, decreasing the length of short-stays.

Furthermore, the emergence of alternatives to the traditional short-stays in hospitals such as ambulatory medicine, autodiagnosics, and home care has also contributed to the decreasing need for short-stay beds. Although the development of such alternatives has caused a decline in the market for hospital-care equipment, it has created a demand for a whole new range of medical equipment.

At the same time, the number of elderly citizens in need of hospitalisation, requiring care that cannot be provided at home, is constantly increasing. This boosts the need for long-stay beds, as the number of fully- or partially-dependent patients increases. This development may be attributed to medical advances enabling patients to live longer, increasing the duration of long-stays.

2. Public Hospitals

- The public sector offers a large range of services and maintains capacity for long-term care as well as first aid. Regional hospitals (most of them university hospitals) are devoted to research and specialised disciplines such as resuscitation, intensive care and specialised (e.g., thoracic and cardiovascular) surgery. General hospitals concentrate, for example, on pneumology, rheumatology and general surgery. Most psychiatric hospitals and paediatric services belong to the public sector.
- Handicaps of the public sector are forged in the costing structure, the very limited budgets, the unequal level of equipment from one region to another, and the strict tariffication system. 70 % of hospital functioning costs are paid on staff salaries.

3. Private Hospitals

- According to the French "Fédération de l'Hospitalisation Privée" (Private Hospitalisation Federation), 6.5 million patients are taken in charge every year in private hospitals. **60 % of all surgical interventions take place in private hospitals.**

The private sector has three other major federations:

- **FEHAP** - Fédération des Etablissements Hospitaliers et d'Assistance Privés (Federation of private hospitals and healthcare assistance)
- **FIEHP** - Fédération Intersyndicale des Etablissements de l'Hospitalisation Privée (Federation of private hospitals)
- **UHP** - Union Hospitalière Privée (Association of private clinics and hospitals)

- The private sector is divided into the following types of establishments:
 - 1,151 Commercial clinics (93,511 beds)
 - 891 Private non-profit making hospitals (68,856 beds)
(this category includes hospitals participating in the public service or not)

(Source: DREES 2001)

- The private sector specialises in ambulatory care and surgery, and obstetric surgery. It also focuses on acute care (short stays), rehabilitation and follow-up care. Ambulatory surgery appears to be the future of private hospitals.
- Private hospitals and clinics must follow the TIPS tariffication, which is a constraint in the first instance, but then allows a better pricing policy. Their budget is taking into consideration the necessary technological investment, an advantage compared to public hospitals.

4. Ambulatory Care

This is provided mainly by General Practitioners and specialists working from home or surgeries. Patients pay directly and are partially reimbursed by Social Security. There are few public health centres (some are run by the Red Cross) and existing ones are closing in increasing numbers. In 2002 consumption of ambulatory care reached €36.2 billion, with an annual growth rate of 7.4% in value, compared to 5.1% 2001.

5. Home Care

- Home care is known in French as "Hospitalisation à Domicile", or HAD. This is still not very well developed in France, with a capacity of only 4,262 places, spread in 80 services. 58 % of HAD is concentrated in the Paris area, whereas 52 "départements" (French counties) have no home care structures. This weakness is compensated by private companies which take care of a few hundreds thousands of patients all over the national territory.
- There is scope for future development, with the ageing of the population, the low cost of home care compared to usual hospitalisation procedures, the new medical and pharmaceutical treatments which are easily adaptable at home (for respiratory diseases and some neuromuscular, tumoral or infectious diseases, also treatments against pain) and the social and psychological benefits of home care for the patients.
- Mr Mattéi, Minister of Health between 2002 and 2004, has introduced a program aiming at increasing the number of home care places available to reach 8,000 places in 2005.

6. Old People's Homes

- **On 1st January 2004, 20.7% of the French population was over 60 years of age** and 8% over 75 years. Forecasts show 17 million people over 60 years in 2030 and 23 million in 2050.
- The average age of hospitalised patients is 76 years. Half of those hospitalised are over 65 years.
- According to the DREES, there were 5,703 old people's homes in 2002.
- **More than 70% of the elderly over 85 years of age live at home**, and only 4% of people over 75 years of age live in institutions, of one of the following types:
 - hospices, essentially attached to public hospitals (0.6%)
 - public or private retirement homes (83.1%)
 - public or private retirement homes with individual housing facilities (16.3%)
- In 2002 the total number of beds in these homes was 392,197 of which:
 - 227,560 beds were for standard old people 's care
 - 164,637 for specialised medical care.

7. "Hôpital 2007" reform

On 20 November 2002, Mr Jean-François Mattéi, Minister of Health in the right wing government led by Jean-Pierre Raffarin, introduced a set of measures called "Hôpital 2007". The general aim of the project is to cut down expenses within the private and public care services. According to Mr Mattéi, growing deficits are largely due to the implementation of the 35-hour week in hospitals (done by Lionel Jospin's left wing government). It is also due, he says, to unclear administrative structures and procedures, leading to irrational and expensive management, as well as to a certain "disenchantment" of staff in hospitals.

The propositions set out by Mr Mattéi on November 2002 are two-fold: on the one hand, they aim at according more autonomy in the management of hospitals, and on the other hand measures are designed to modernise organisation and management within hospitals. Here are the main measures as described by the Minister of Health:

- **Complete renewal of hospitals' financing systems:** hospitals will be funded depending on the "real service" offered to the community and on their effective medical activity. This is the main part of the "Plan Hôpital 2007", known as the "Tarification à l'Activité" ("Costings based on Activity"). The system has been tested in several hospitals from 2003 on, and if proved cost-effective, it is bound to be generalised in 2004 and 2005. The plan also aims at combining both public and private hospitals' funding schemes.
- **Attributions and responsibilities of the ARH will be reinforced**, and the "Carte Sanitaire" procedure and its consequences are to be simplified. The regional agencies will be directly responsible for the allocation and breakdown of an annual envelope dedicated to investment in the buildings and equipment renewal. The call for private companies, particularly concerning real estate programs and investments, will be favoured.

- **Purchasing procedures** are to be softened and simplified.
- Staff and employees' interest in the establishment's results will be encouraged.

The first results obtained in pilot hospitals and regions are under evaluation, but the "Hôpital 2007" plan has already been largely criticised by staff representatives and syndicates, who consider it as a liberalisation of hospitals and of the public care institution. They fear that too much decentralisation will lead to disparities and unequal medical care for people over the French territory.

THE SOCIAL SECURITY SYSTEM

1. Critical elements of the healthcare system influencing market demand

- Virtually the entire population of France is covered by the Social Security system (equivalent to the NHS in the UK).
- Universal health insurance (CMU – "Couverture Maladie Universelle") has been introduced in January 2000, and covers approximately 6 million people, i.e. 11% of the French population.
- The government has created a framework for healthcare in which public and private hospitals co-exist to provide the population with easy access to the required treatments. Within this framework, both public and private hospitals are subject to government approval for their location, their development and their major medical equipment investments. This is known as the "Carte Sanitaire".
- For each medical speciality there are bed / population ratios which have a direct impact on these approvals.
- The individual patient is free to choose treatment in either a public or private hospital.

2. Health Financing

- The national health insurance scheme covers approximately 95% of the population and is paid for by employers, employees and the self-employed.
- This system applies to both public and private sectors and pays both hospital and ambulatory care.
- **The major difference between the UK and French systems** is that in the latter the patient has to pay for treatment, visits and services, and claim reimbursement. Pharmacists, hospitals and healthcare service providers can nevertheless subscribe to a convention called "Tiers Payant", by which the patient will not have to pay up-front for his / her medicines or prescriptions, as this will automatically be paid by the Social Security.
- Patients' contribution is approximately 25% of hospital costs and 30% of doctors' fees for benign (minor) illnesses. This is often covered by their private insurance. In the case of serious illness the social security system will pay up to 100%.

The management of the Social Security is organised in such a way to be equally divided between trade unions and business representatives, supervised by regional administrators appointed by the government.

3. Current Reforms

The high level of health expenditure over the last 20 years has put France among OECD leaders in healthcare spending. **In 2003, the Social Insurance deficit was estimated at €9 billion.** However, the huge deficit of the national health insurance scheme has led successive governments to attempt reforms. Radical measures to curb spending and to reform the Social Security system and hospital funding were introduced in 1995.

The reform gave more power to regional authorities (see next paragraph) for management, allocation and control of funding in hospitals. The number of beds were cut and annual spending targets are since then set by Parliament. To allocate funding, a system of accreditation known as the PMSI ("Programme de Médicalisation des Systèmes d'Information") is used to identify efficient public hospitals. Sanctions (e.g., reduction or freezing of funding) are taken against hospitals and doctors who do not succeed in curbing expenditure.

On the other hand, competitiveness and achievement are rewarded. 24 regional agencies (ARH – "Agences Régionales de l'Hospitalisation") manage hospital budgets according to needs and efficiency. They cover both public and private hospitals and clinics. They are also looking after quality and safety issues in French hospitals. Nevertheless, it will be the hospital or the clinic that will choose the kind of equipment or products they want to purchase.

The system is reinforced by the introduction of the "Tarification à l'Activité" as part of the "Hôpital 2007" reform (see page 19). From now on until 2012, hospitals' funding will progressively be based on their actual results and not on their spending anymore. The next months will also see the government introduce new measures trying to curb the Social Security deficits. A space to be watched with attention.

4. AFSSAPS

On 1st July 1998, the French parliament enacted a law that established the French Agency for Safety of Health Products, called "Agence Française de Sécurité Sanitaire des Produits de Santé" (AFSSAPS). It was officially established on 1st January 1999.

- AFSSAPS replaced a number of former agencies by combining their activities and reinforcing their authority. The tainted-blood scandal, the BSE crisis, and other healthcare issues have set a positive climate for the establishment of this strong, powerful and central entity.
- **It is responsible for evaluating, supervising and controlling** all health products for human use, including medical devices, pharmaceuticals, cosmetics and human-hygiene products. It has an annual budget of €60 million and 660 staff, two thirds of them being scientists.
- **AFSSAPS is in charge of the central registration of CE Marks certifications** for medical devices, as G-Med is now controlled by AFSSAPS.

Regulation and economic evaluation are key issues in the French healthcare policy at the moment. AFSSAPS' new roles include evaluation of risks / benefits of medical equipment to the patient ("SMR: Service Médical Rendu"), economic evaluation in order to determine the level of reimbursement of medical equipment by Social Security according to the technological advent and the effectiveness of the products, by comparison to

competitor products already on the marketplace, and quality control of medical products before they are sold ("Matéiovigilance").

AFSSAPS will make recommendations, using the SMR and evaluation tools, about every new medical device or pharmaceutical product.

AFSSAPS

(AGENCE FRANCAISE DE SECURITE SANITAIRE DES PRODUITS DE SANTE)

143-147 boulevard Anatole France

93285 SAINT DENIS Cedex

Tel: 01 55 87 30 00

Fax: 01 55 87 30 82

Web: <http://www.afssaps.sante.fr>

Contacts: Mrs Isabelle TORDJMAN – Directeur de l'Evaluation des Dispositifs Médicaux
(Manager for the Evaluation of Medical Devices)

UK OFFICE:

AFSSAPS

34 th Floor

Canary Wharf

1, Canada Square

LONDON E14 5AB

United Kingdom

Tel: 0207 5129615

Fax : 0207 5129565

Contact: Mr Miguel BLEY

5. CEPS (Comité Economique des Produits de Santé)

CEPS (Comité Economique des Produits de Santé) is responsible for economic regulation in the healthcare sector. It is an inter-ministerial body, playing between the Ministry of Health, the Social Security, the French Customs, the Ministry of Industry, and all other partners involved in public health management.

- After AFSSAPS' recommendation, CEPS will advise the relevant ministries on prices and reimbursements of pharmaceuticals and medical devices. CEPS will also follow up actual expenses, according to the financial objectives annually set by the government. This objective is known as the ONDAM (Objectif National des Dépenses d'Assurance Maladie), and tends to be exceeded every year, causing some debates between the government, health professionals and Social Security partners.

Ministère de la Santé

Comité Economique des Produits de Santé (CEPS)

8 avenue de Ségur

75007 PARIS

Tel: 01 40 56 60 00

Fax: 01 40 56 40 50

Contacts: M. Noël RENAUDIN – Président (President)

Mme GENDRE-OGET - Reponsable des Dispositifs Médicaux

(Manager for Medical Devices)

direct tel: 01 40 56 45 60

Madame CHEINEY – Responsable des Médicaments

(Manager for Pharmaceutical Products)

direct tel: 01 40 56 75 54

6. LIST OF REIMBURSABLE MEDICAL PRODUCTS AND DEVICES: Ex-T.I.P.S. ("Tarif Interministériel de Prestations Sanitaires")

The cost of a wide range of medical products approved by the French Ministry of Health may be reimbursed by Social Security according to a scale set by the Ministry.

Until 1999, the list of reimbursable products was known as the "Tarif Interministériel de Prestations Sanitaires" (T.I.P.S.). In 1999, TIPS was considered as a rather complicated, bureaucratic, and not entirely satisfactory tariffication system, and the French government has decided to replace it with a new reimbursement scheme.

- **The list consists of** product descriptions (no brand names) and the respective prices. For disposable products, surgical products, prostheses, small portable medical equipment used by patients and wheelchairs, being listed means in effect getting Social Security reimbursement and is a major asset when it comes to selling products in France.
- **In order to get their medical products/equipment listed**, British companies should contact CEPS (see address above). They must present their products to the Ministry of Health and include a product specification file, in French, to enable their products to be tested and approved by hospitals, laboratories or clinics appointed by the Ministry. Reimbursement prices are set according to the medical and economic benefits of each device. When possible, the price is determined in comparison to already available equipment. In general, 20 product samples are required for testing in 4 different locations. This can take up to 6 months. Depending on the reports from the 4 test locations, the product will or will not be accepted for the reimbursement scheme.
- **Medical equipment purchased by private clinics** is regulated under the ex-TIPS. In order for patients to be reimbursed by the Social Security, medical devices used by private clinics must be listed, or their cost must be coherent with the "Forfait de Salles d'Opérations" (FSO, forfait for operations rooms) or comprised within the tariffication limits of acts listed on the medical nomenclature. Public hospitals are free to make medical equipment purchase decisions within the confines of their overall budgets. The budget determines their spending limits but does not restrict their purchase decisions. In theory, prices are not controlled since public calls for tender (see page 31) are to be won by the most competitive supplier.
- Nevertheless, if a medical device about to be purchased by a public entity is also sold to private clinics (and so listed on the ex-TIPS), public purchasers will use the listed price as a reference. They will then do their best to obtain a lower price. De facto, the listed published price becomes the maximum price for a given device, as no public hospital will accept being charged more than private clinics.

DISTRIBUTION

- The French distribution system is quite complex: large manufacturers or multinationals with French subsidiaries will sell direct to both the public and private sectors, through their own representatives. Smaller manufacturers, wholesalers and importers will sell to a distributor who will be responsible for the direct contacts and negotiations with customers, in the private as well as in the public sectors. Some distributors sell through catalogues, others through a single shop, chain or purchasing group. It is noticeable that the limit between manufacturers, importers and distributors is not always very clear, with some manufacturers also importing and some importers also distributing.
- There are three main ways for British companies to sell medical equipment in France: working through an agent, using a distributor or by establishing a subsidiary. Exporting through a distributor or agent is the most common practice.

1. Agents

- **An agent** works with retailers and end-users to promote the company's products. An agent's commission for medical equipment is usually about 15 to 20 percent, and agents will frequently request exclusive representation.
- Agents are protected by a number of laws in France. If a British manufacturer wishes to terminate the business relationship with the agent prior to the expiration of the contract, the agent must first be contacted and given the opportunity to improve his / her performance. If the British manufacturer still wishes to end the relationship after these steps have been followed, the agent has the right to retain the names of all contacts, clients, and related sales information. The manufacturer may purchase this information from the agent, but it is often very expensive. Lastly, the manufacturer could be required to pay a severance fee, ranging from one to two years of the agent's anticipated future commissions.

2. Distributors

- **A distributor** purchases products from the British manufacturer, then adds a 30 to 50 percent mark-up to cover commissions, credit risks, after-sales service, and the cost of carrying a local inventory to meet small orders. French distributors also often request exclusive contracts.
- Although the law ruling the relationship between a distributor and its principal is different from the law applicable to an agent, if termination occurs prior to the contract expiration, the usual termination fee equals the value of the distributor's expected profit margin over a two-year period. Furthermore, a medical equipment distributor representing a British product in France controls the product's marketing strategy and image. The distributor is also not obliged to communicate market

research information to the British manufacturer. It is therefore important to select a distributor who is completely in tune with the British company's goals and objectives.

- Industry insiders recommend that British companies be represented by a reliable and cooperative agent or distributor, who should be willing to provide sufficient technical information to its customers as well as inform headquarters of all comments by end-users. A strong relationship with a small and specialised representative can be the most viable and profitable long-term arrangement. Another practical approach to the market is through the complementary sales of a French manufacturer whose knowledge of the market facilitates targeting. Consequently, a bilateral arrangement of this kind can often be mutually profitable.

3. Subsidiaries

- **Establishing a subsidiary** offers several advantages to the manufacturer: better control over distribution practices, the ability to adapt quickly to evolving needs of the market, more direct influences over staff training, and controls over unauthorised dissemination of technology. However, a subsidiary involves a much greater financial investment and the responsibility of maintaining assets and employees in a foreign country.

CENTRAL PURCHASING GROUPS

1. For hospitals in the public sector

ASSISTANCE PUBLIQUE – HOPITAUX DE PARIS (AP - HP)

3 avenue Victoria

75110 PARIS RP

Tel: 01 40 27 30 00

Fax: 01 40 27 19 71

Contacts: M. Antoine DURRLEMAN – Directeur Général (Managing Director)

M. Yves PEDOUSSAUT – Directeur des Affaires Internationales
(International Affairs Manager)

Web: www.ap-hp.fr

First French and even European hospital network with 39 hospitals, of which 17 in Paris, 18 in the Paris area (région Ile-de-France) and 4 in province

24,977 beds

Annual budget: € 4.5 billion

90,658 staff, of which 17,700 doctors

3,000 students

996,600 hospitalisations; 4.750 millions consultations; 900,000 medical emergencies; 14,600 patients benefiting from home care in 2000.

Direction des Equipements

3 avenue Victoria

75100 PARIS RP

Tel: 01 40 27 30 00 / 33 41

Fax: 01 40 27 38 00

Contact: M. William SOUFFIR – Chef du Bureau d'Etudes (Technical Manager)

E-mail: william.souffir@sap.ap-hop-paris.fr

Pharmacie Centrale des Hôpitaux

7 rue du Fer à Moulin

BP 9

75221 PARIS CEDEX 05

Tel: 01 46 69 13 30

Fax: 01 46 69 12 34

Contact: Mme Elisabeth AOUN – Directrice des Achats de Médicaments

(Purchasing Manager for Pharmaceuticals)

E-mail: elisabeth.aoun@sap.ap-hop-paris.fr

HOSPICES CIVILS DE LYON (HCL)

Hôpital de l'Hôtel Dieu

3 Quai des célestins

69237 LYON Cedex 02

Tel: 04 72 41 30 01 or 0820 820 69 (switchboard)

Fax: 04 72 40 75 00

Contacts: Mme COUTY – Chargée de Mission Relations Internationales
(Project Manager, International Relations)

/ E-mail relations.internationales@chu-lyon.fr
or: Mme GIBERT - Directrice des Achats (Purchasing Manager)
Web: www.chu-lyon.fr

17 hospitals, 5,668 beds, 20,000 staff
Annual budget: over € 1,123 million
189,728 hospitalisations, 980,306 consultations, 204,700 medical emergencies
yearly.

APHM (Assistance Publique – Hôpitaux de Marseille)

Hôpital Nord
Chemin des Bourrely
13915 MARSEILLE Cedex 20
Tel: 04 91 96 80 00
Fax: 04 91 96 80 01
Contacts: Dr Guy VALLET – Directeur Général APHM (Managing Director for APHM)
M. Jean-Paul GASSEND – Directeur des Relations Internationales
(International Relations Manager)
Mme LARIVEN – Directrice des Achats (Purchasing Manager)
Web: www.ap-hm.fr

4 hospitals, 3,468 beds, 15,320 staff
€ 1 billion budget
121,379 hospitalised patients, 885,721 consultations in 2002

2. For hospitals in the private sector

CACIC (Centrale d'Achats, de Conseils et d'Information des Cliniques)

BP 101
Allée du Petit Cher
37551 SAINT AVERTIN cedex
Tel: 02 47 71 14 14
Fax: 02 47 28 94 82
E-mail: agnes.noah@cacic-sante.com
Director: Mme Agnès NOAH – Directrice
Web: www.cacic-sante.com

Listing centre covering the whole of France and working with 659 private establishments (clinics, retirement homes and rehabilitation centres). They publish 5 catalogues specialised by products and services (e.g., pharmacy, medical equipment, catering services). SARL (Société à Responsabilité Limitée – equivalent to a company with limited liability) created in 1976, with a capital of €16,769.

CAHPP (Centrale d'Achats de l'Hospitalisation Privée et Publique)

20/22 rue Richer
75009 PARIS
Tel: 01 55 33 60 00
Fax: 01 55 33 60 08
President: M. Yvon BERTEL-VENEZIA – Président
Web: www.cahp.fr

Purchasing centre working with nearly 800 private clinics in France. They publish a directory of medical suppliers. SA (Société Anonyme – equivalent to a plc company) with a capital of €392,452.

CLUB H (GROUPEMENT D'ACHAT POUR LES ETABLISSEMENTS DE SOINS PRIVES)

Normandie 2

55 rue de l'Amiral Cécille

76038 ROUEN Cedex

Tel: 02 32 81 86 00

Fax: 02 32 81 86 01

E-mail: contact@clubh.fr

Managing Director: M. Eric TABOUELLE – Président Directeur Général

Web: www.clubh.fr

Independent listing centre working with a 300 establishments network (including mid term establishments) in the whole of France.

They deal with tenders on behalf of their subscribers.

GENERALE DE SANTE

96 avenue d'Iéna

75783 PARIS Cedex 16

Tel: 01 53 23 14 14

Fax: 01 53 23 61 11

President and M.D.: M. Daniel BOUR – Président Directeur Général

Contacts: Mme Martine GIDON (tel: 01 53 23 14 99 / m.gidon@gsante.fr)

or M. Loïc RICOUR (tel: 01 53 23 17 15 / l.ricour@gsante.fr)

Web: www.generale-de-sante.fr

Major private hospitals network in France and in Europe. Listing centre working with 106 establishments in the whole of France, and 21 establishments in Europe. They participate in the management of investments by the clinics belonging to their group. They have no catalogue but help clinics choose their medical equipment.

They claim to be the European leaders of private hospitalisation, with a turnover of €1.153 billion in 2002.

3. SAMU MEDICAL and SMUR

The SAMU (Service d'Ambulances Médicales d'Urgence) is an official independent first aid and emergency ambulance service attached to a large public hospital or a group of hospitals.

In France there are 95 SAMU, one in each county ("département").

Please visit: www.samu-de-france.com

Links to all SAMUs is available at <http://www.samudeparis.org/liens.html>

SMUR (Service Médical d'Urgence Régional) is the name used in regional provinces.

There are 330 SMUR situated all over the French territory.

Each SAMU or SMUR will purchase their own medical equipment.

For Paris, the purchasing office is:

SAMU

Hôpital Necker

149 rue de Sèvres

75015 PARIS
Tel: 01 44 49 24 01
Fax: 01 44 49 24 24 / 23 25
Contacts: Mme Véronique CHAMPENOIS and Mme Marie-Pierre DUVAL
- Responsables Achats (Purchasing Managers)
Web: www.samudeparis.org

4. For Paris Fire Brigades

BRIGADE DES SAPEURS POMPIERS DE PARIS

1 Place Jules Renard
75017 PARIS
Tel: 01 56 79 67 00
Fax: 01 47 54 68 86
Contact: Service de Santé et de Secours Médical
(Healthcare and Medical Assistance Department)
E-mail: secretariat.sssm@pompiersparis.fr
Web: www.bspp.fr

BATAILLON DES MARINS POMPIERS DE MARSEILLE

9 boulevard de Strasbourg
BP 207
13303 MARSEILLE
Tel: 04 91 55 90 47
Fax: 04 91 55 90 42
Contact: Médecin Chef, Division Santé (Chief Doctor, Healthcare Division)
Web: www.marins-pompiers.nefert.net

5. Army and Navy Purchasing Groups

SERVICE DE SANTE DES ARMEES

Ministère de la Défense

14 rue St Dominique
BP 125
00452 ARMEES
Tel: 01 42 19 30 11
Fax: 01 41 93 27 95
Contacts: Chef du Service Santé (Manager, Healthcare Division) No name given.
Web: www.defense.gouv.fr/sante

DAEC

(DIRECTION D'APPROVISIONNEMENT DES ETABLISSEMENTS CENTRAUX)

BP 05
45998 ORLEANS ARMEES
Tel: 02 38 60 72 08
Fax: 02 38 60 73 39
Contact: Madame Le Pharmacien Chimiste GROS – Chef de Division Achats
(Purchasing Division Manager)

PUBLIC PURCHASING: CALLS FOR TENDER ("APPELS D'OFFRES")

In the public sector, supplies and services expected to cost over €750,000 tax free and public works expected to cost over €5,000,000 tax free must be pre-advertised officially throughout the European Union.

Public calls for tender are published in France in the "Bulletin Officiel des Annonces de Marchés Publics" (BOAMP) or eventually in a publication authorised to receive legal advertisements.

Calls for tender are compulsorily published in the BOAMP for items expected to cost :

over €130,000 tax free for state-managed markets

and

over €200,000 tax free for markets managed by local authorities.

For supplies and services expected to cost respectively:

more than €130,000 tax free for state-managed markets,

more than €200,000 tax free for local authorities markets

and for public works expected to cost more than €5,000,000 tax free

calls for tender are also published in the European Official Journal and are thus already open to foreign manufacturers and suppliers.

To reply to these advertisements ("Appels d'Offre"), a company must have representation in France, even if only an agent.

Please consult the BOAMP web site at <http://www.journal-officiel.gouv.fr> (under their "Marchés Publics" section) to obtain a list of currently valid calls for tender.

Source: Nouveau Code des Marchés Publics, Art. 39 & 40

ANNEXES

THE FRENCH HEALTHCARE MARKET

BRITISH EMBASSY PARIS

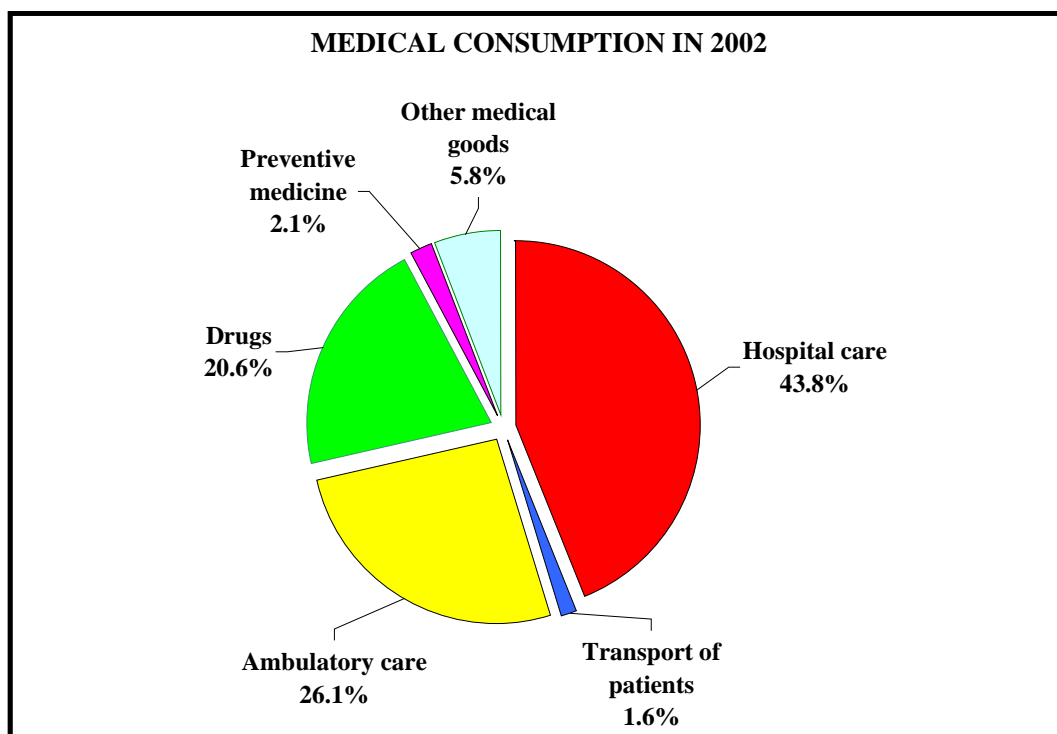
Tables and graphs prepared by J. Couvelaère (Statistician)
& C. Monrose (Trade Sector Promoter)

MAY 2004

FRENCH MEDICAL CONSUMPTION

Euros million

	1995	2000	2001	2002	2002 % share	% change 2002/2001
Hospital care	49,105	54,995	57,337	60,742	43.8%	5.9%
public	37,881	43,893	45,863	48,458	35.0%	5.7%
private	11,224	11,102	11,474	12,284	8.8%	7.1%
Ambulatory care	27,565	32,093	33,727	36,206	26.1%	7.4%
doctors	13,240	15,362	15,828	16,939	12.2%	7.0%
nurses & other medical auxiliaries	5,314	6,483	6,849	7,489	5.4%	9.3%
dentists	5,838	6,575	7,153	7,557	5.4%	5.6%
tests	2,359	2,819	3,009	3,317	2.4%	10.2%
spa treatment	814	854	888	904	0.7%	1.8%
Drugs	19,404	25,212	27,198	28,572	20.6%	5.1%
Other medical goods	4,413	6,617	7,391	8,077	5.8%	9.3%
Optical care	2,540	3,234	3,585	3,758	2.7%	4.8%
Orthopaedics / prosthesis	1,468	1,705	1,863	2,037	1.5%	9.3%
Small medical appliances	405	1,678	1,943	2,282	1.6%	17.4%
Preventive medicine	2,239	2,703	2,824	2,963	2.1%	4.9%
Patient transportation	1,452	1,862	2,026	2,221	1.6%	9.6%
TOTAL	104,178	123,482	130,503	138,781	100.0%	6.3%
% of GDP	8.8	8.7	8.8	9.1	-	-



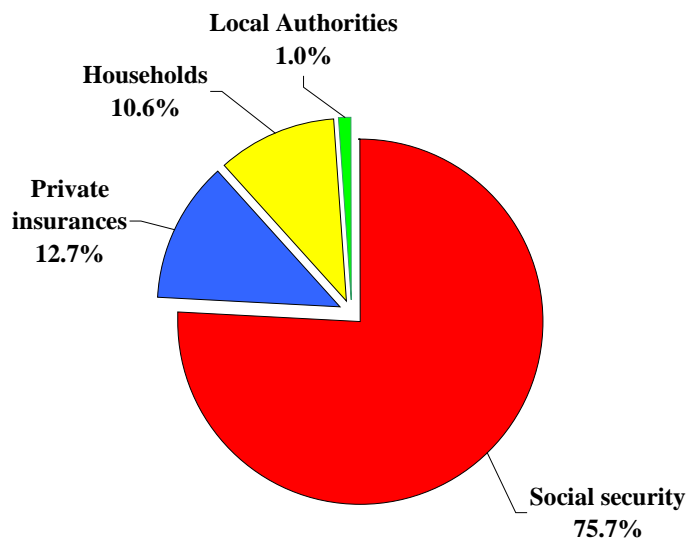
Source: Comptes nationaux de la santé 2002 (Ministry of Health & INSEE).

FRENCH CURRENT HEALTH EXPENDITURE

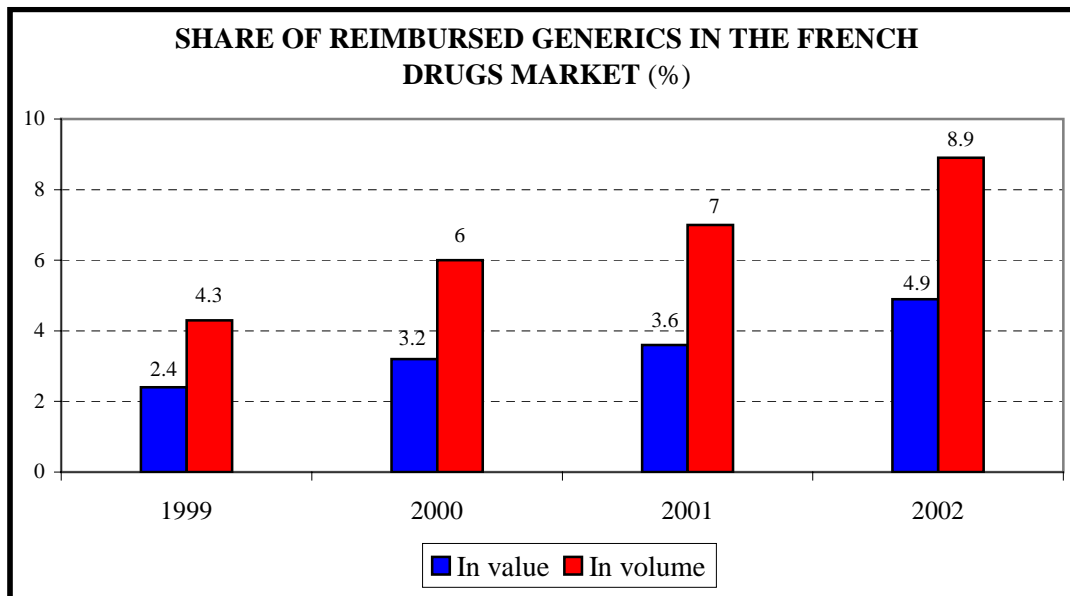
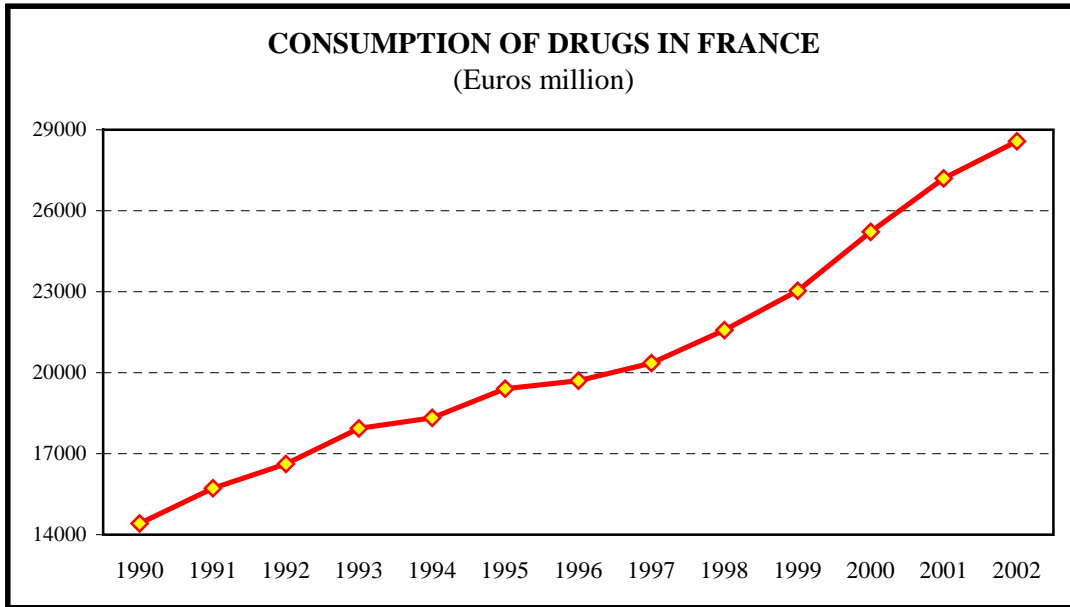
Euros million

	1995	2000	2001	2002	2002 % share	% change 2002/2001
Medical care and goods	111,644	131,485	138,902	147,714	93.5%	6.3%
<i>Of which:</i>						
<i>Hospital care</i>	50,689	55,919	58,125	61,213	38.8%	5.3%
<i>Ambulatory care</i>	27,564	32,093	33,727	36,206	22.9%	7.4%
<i>Drugs</i>	19,404	25,212	27,198	28,572	18.1%	5.1%
<i>Subsidies / aids to patients</i>	6,651	8,162	9,863	9,624	6.1%	-2.4%
<i>Others</i>	7,336	10,099	9,989	12,099	7.6%	21.1%
Prevention care	2,720	3,368	3,516	3,702	2.3%	5.3%
Training and research	2,518	3,260	3,424	3,684	2.3%	7.6%
Management	1,904	2,561	2,702	2,816	1.9%	4.2%
TOTAL	118,786	140,674	148,544	157,916	100.0%	6.3%
% of GDP	10.1	9.9	10.1	10.4	-	-

FINANCING OF CURRENT HEALTH EXPENDITURE IN 2002



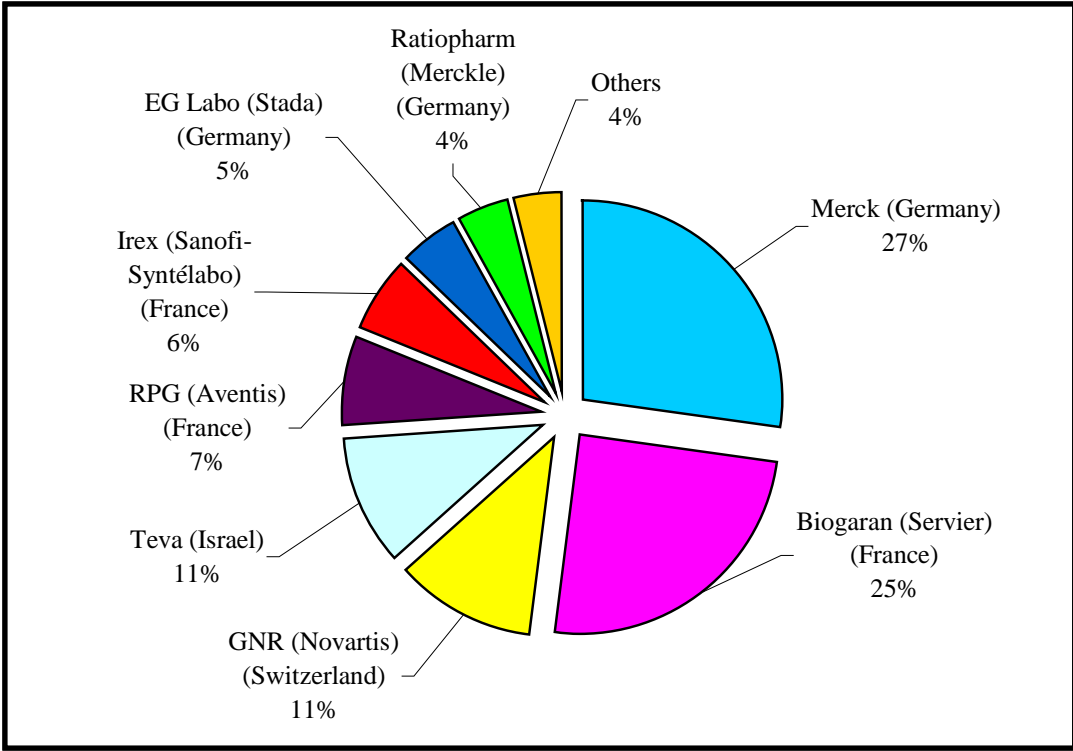
Source: Comptes nationaux de la santé 2002 (Ministry of Health & INSEE).



Sources: Ministry of Health (DREES), Inse, Inserm.

GENERICS : THE FRENCH MARKET BY MANUFACTURERS

(Percent share - July 2003)



Source: La Tribune (October 2003).

FRENCH PRODUCTION OF MEDICAL TECHNOLOGY EQUIPMENT

(Euro millions in 2002)

1) MEDICAL & SURGICAL APPLIANCES / INSTRUMENTS	
Electrodiagnostic appliances	32.0
Dental appliances and instruments	58.6
Sterilisers	14.3
Syringes	179.9
Needles	10.0
Catheters & nozzles	328.3
Ophthalmology appliances & instruments	42.6
Blood pressure instruments	7.3
Blood transfusion appliances	154.2
Surgical appliances & instruments	92.9
Other electronic appliances (excluding ultrasounds)	52.0
Physiotherapy equipment	60.2
Ozonotherapy equipment	18.4
Other respiration apparatus	76.1
Others (including servicing, assembling & repairs)	53.9
Total	1,180.7
2) ORTHOPAEDIC / PROSTHESIS EQUIPMENT	
Articular prosthesis	313.4
Orthopaedic large appliances	77.9
Orthopaedic small appliances	66.6
Hearing aid appliances	60.5
Fracture appliances	8.9
Canadian crutches	4.2
Dental prosthesis	69.7
Other orthopaedic appliances	15.1
Other prosthesis appliances	183.0
Other implants	71.8
Total	871.1
3) MEDICAL & SURGICAL FURNITURE	259.0
4) OTHER MEDICAL APPLIANCES & EQUIPMENT *	275.8
SUB-TOTAL (from 1 to 4)	2,586.6
5) WHEELCHAIRS FOR THE HANDICAPPED	44.0
6) RADIOLOGY / MEDICAL ELECTRONICS	1,415.7
TOTAL (1 - 6)	4,046.3

Figures refer to firms employing 20 people and more. The turnover is net of tax.

* Confidential statistics, which are not broken down by detailed products.

Sources: SESSI (Ministry of Industry).

EXTERNAL TRADE OF MEDICAL TECHNOLOGY EQUIPMENT

(Euros million)

	2002			2003			% change 03/02	
	Exports	Imports	Balance	Exports	Imports	Balance	Exports	Imports
Medical, surgical and veterinary appliances, instruments and parts	1,543.3	1,939.8	-396.5	1,527.0	1,918.6	-391.6	-1.1%	-1.1%
<i>Of which:</i>								
Syringes	131.4	84.6	46.8	135.9	96.5	39.4	3.4%	14.0%
Needles, catheters and cannulae	98.6	290.4	-191.8	96.8	315.6	-218.9	-1.8%	8.7%
Artificial kidneys	114.9	70.6	44.3	86.8	63.6	23.2	-24.4%	-9.9%
Transfusion apparatus	84.8	34.7	50.2	71.0	34.0	37.0	-16.3%	-2.0%
Dental instruments and appliances	65.7	103.4	-37.7	68.5	105.4	-36.9	4.2%	1.9%
Electro-diagnostic apparatus	70.9	77.6	-6.7	65.4	61.6	3.8	-7.8%	-20.7%
Other instruments and appliances	753.8	716.4	37.4	795.4	693.4	102.0	5.5%	-3.2%
Sterile surgical catgut	120.9	128.4	-7.6	108.8	116.5	-7.7	-10.0%	-9.3%
First-aid boxes and kits	1.4	2.3	-1.0	0.9	2.8	-1.9	-33.4%	22.1%
Surgical gloves	12.4	49.0	-36.6	10.5	41.0	-30.5	-15.4%	-16.3%
Paper articles for medical / surgical use	4.6	37.0	-32.4	5.1	24.3	-19.2	9.9%	-34.5%
Medical, surgical and laboratory sterilizers	17.4	17.7	-0.3	11.8	20.3	-8.5	-32.1%	14.5%
Personal weighing machines	46.3	18.7	27.6	37.7	27.2	10.5	-18.6%	45.7%
Invalid carriages and parts	19.3	39.6	-20.2	18.4	47.2	-28.8	-4.8%	19.2%
Respiration apparatus	43.7	81.8	-38.1	51.6	102.7	-51.1	18.2%	25.6%
Orthopaedic and prosthesis equipment	685.1	775.7	-90.6	853.1	995.3	-142.2	24.5%	28.3%
<i>Of which:</i>								
Artificial joints and parts	178.9	135.3	43.6	198.2	156.0	42.2	10.8%	15.3%
Pacemakers	28.6	88.0	-59.4	178.6	242.7	-64.1	524.1%	175.8%
Orthopaedic appliances	130.2	101.9	28.4	154.8	109.2	45.6	18.9%	7.3%
Articles worn/ implanted in the body to compensate a disability	75.9	87.0	-11.1	81.8	110.6	-28.8	7.8%	27.1%
Artificial parts (excluding dental and ocular prosthesis)	103.2	115.1	-11.9	72.0	113.1	-41.2	-30.3%	-1.7%
Fracture appliances	71.3	28.0	43.3	60.0	24.8	35.1	-15.9%	-11.2%
X-Ray apparatus	941.2	800.4	140.8	930.0	717.6	212.4	-1.2%	-10.3%
Medical, dental and veterinary furniture	64.7	50.8	13.9	61.5	64.6	-3.1	-4.9%	27.3%
TOTAL	3,500.3	3,941.3	-440.9	3,616.5	4,078.2	-461.7	3.3%	3.5%

Source: French Customs.

NUMBER OF HOSPITALS IN FRANCE

	Private clinics		Private hospitals		Public hospitals *	
	1992	2001	1992	2001	1992	2001
TOTAL	1,426	1,151	912	891	1,057	1,010

NUMBER OF FULL-TIME BEDS

	Private clinics		Private hospitals		Public hospitals	
	1992	2001	1992	2001	1992	2001
Medecine	14,545	12,101	16,703	10,225	102,393	92,947
Surgery	50,793	42,450	12,957	9,722	58,818	44,995
Obstetrics	9,771	7,085	2,110	1,645	16,628	14,611
Middle stays	18,540	20,062	34,418	31,185	40,647	38,304
Long stays	652	787	4,336	6,758	68,277	76,127
Psychiatry	12,976	10,965	13,465	9,321	61,538	42,063
TOTAL	107,277	93,450	83,989	68,856	348,301	309,047

* Legal entities.

Source: Ministry of Health (SAE, DREES).

HOSPITAL STAFF

(Number of full-time staff)

	Public	Private	Total
Management	75,628	31,839	107,467
Caring and training staff	478,138	156,801	634,939
Training staff for nurses	24,065	6,606	30,671
Nurses	187,101	60,228	247,329
Caring assistants	161,275	44,691	205,966
Midwives	7,079	2,885	9,964
Medical services staff	73,264	31,418	104,682
Others	25,354	10,973	36,327
Medico-technical staff (1)	33,243	6,509	39,752
Technical staff (2)	83,817	22,678	106,495
TOTAL	670,826	217,827	888,653

	Public	Private	Total
Doctors, biologists & pharmacists			
Employees	80,022	14,313	94,335
Self-employed	2,820	43,392	46,212
Total	82,842	57,705	140,547
Interns	17,237	1,152	18,389

(1) Including chemists, physiotherapists, laboratory and social staff.

(2) Technical staff and employees responsible for internal services and cars.

Source: Ministry of Health (DREES, number in 2001).

NUMBER OF DOCTORS IN FRANCE

(In January 2003)

	Total France (metropole)			Self-employed		Employees		Hospital employees	
	Number	Density*	% women	Number	% women	Number	% women	Number	% women
Total number	201,400	338	29.8	120,084	29.1	81,316	48.0	57,831	41.1
of which:									
General Practitioners	98,505	165	36.8	67,880	28.0	30,625	56.4	16,463	47.9
Specialists	102,895	173	37.5	52,204	32.2	50,691	43.0	41,368	38.3
Medical specialists	56,171	94	38.8	28,750	35.3	27,421	42.5	25,124	40.6
Anatomy	1,607	3	59.6	728	50.8	879	66.9	792	66.9
Anesthesia	10,140	17	37.1	3,285	26.6	6,855	42.1	6,646	42.1
Cardiology	5,812	10	16.2	3,752	13.3	2,060	21.4	1,958	20.9
Dermatology	3,961	7	62.6	3,422	63.3	539	58.0	443	55.9
Endocrinology	1,372	2	66.1	716	67.3	656	64.8	613	65.1
Gastroenterology	3,263	5	20.1	1,934	15.0	1,329	27.4	1,255	27.7
Gynaecology	1,836	-	90.0	1,691	90.5	145	84.0	77	72.6
In-house medicine	2,445	4	24.2	405	14.6	2,040	26.1	1,929	26.7
Physiotherapy	1,894	3	40.1	601	22.5	1,293	48.2	1,116	45.7
Neurology	1,697	3	37.8	694	33.3	1,003	40.9	955	41.0
Paediatrics	6,454	-	57.5	2,951	51.9	3,503	62.1	2,670	54.3
Pneumology	2,624	4	31.0	1,049	23.5	1,575	36.0	1,454	35.2
X-ray diagnostics	7,460	13	27.4	4,858	20.1	2,602	41.1	2,471	40.8
Rheumatology	2,616	4	32.9	1,873	29.7	743	41.0	662	39.3
Others	2,989	na	na	791	na	2,198	na	2,082	na
Surgeons	24,025	40	23.0	15,973	24.5	8,052	19.9	7,648	18.8
Medical biology	3,066	5	46.9	893	32.4	2,173	52.9	1,522	52.5
Psychiatry	13,548	23	42.4	6,503	37.2	7,045	47.2	6,196	46.0
Work medical care	5,016	8	69.4	74	56.8	4,942	69.6	421	74.5
Public health	1,069	2	58.6	11	54.5	1,058	58.6	458	52.3
Overseas departments	4,037	229	31.2	2,333	27.2	1,704	36.6	1,207	30.1

Figures may not equal the total due to rounding.

* Number of doctors per 100,000 inhabitants.

Source: Ministry of Health (DREES).

ANNEX 2: TRADE FEDERATIONS AND OFFICIAL BODIES IN THE MEDICAL SECTOR

SNITEM

(SYNDICAT NATIONAL DE L'INDUSTRIE DES TECHNOLOGIES MEDICALES)

39-41, rue Louis Blanc

92400 COURBEVOIE

Tel: 01 47 17 63 88

Fax: 01 47 17 63 89

E-mail: info@snitem.fr

Web: <http://www.snitem.fr>

President: M. Patryck BREITBURD

Official trade federation for general medical equipment.

APPAMED (GROUPEMENT POUR ACCESSOIRES, PANSEMENTS, PETIT APPAREILLAGE A USAGE MEDICAL)

37-39 rue de Neuilly

BP 121

92113 CLICHY CEDEX

Tel: 01 47 56 30 05

Fax: 01 47 37 94 54

E-mail: appamed@textile.fr

Web: www.appamed.org

President: M. Frédéric BIFFAUD

Official trade federation for small equipment and disposable products in the medical sector.

UNPDM (UNION NATIONALE DES PRESTATAIRES DE DISPOSITIFS MEDICAUX)

37-39 rue de Neuilly

BP 121

92113 CLICHY Cedex

Tel: 01 47 56 31 37

Fax: 01 47 56 30 26

Contact: Mme Claudine GROUZELLE – Déléguée Générale (Executive Secretary)

E-mail: claudine.grouzelle@wanadoo.fr

Trade federation for distributors of small medical equipment and home care products.

CIFL (COMITE INTERPROFESSIONNEL DES FOURNISSEURS DE LABORATOIRES)

28 rue Saint Dominique

75341 Paris cédex 07

Tel: 01 44 18 98 62

Fax: 01 44 18 98 63

Contact: Mme Christiane TURCI – Déléguée Générale (Executive Secretary)

Web: www.forumlabo.com

Official trade federation for laboratory equipment.

LEEM (LES ENTREPRISES DU MEDICAMENT)

88, rue de la Faisanderie
75016 Paris
Tel: 01 45 03 88 88
E-mail: dcre@leem.org
Web: www.leem.org
President: M. Pierre LE SOURD

Official representative federation for the pharmaceutical sector.

ADEBIO (ASSOCIATION POUR LE DEVELOPPEMENT DES BIOINDUSTRIES)

Maison de la Chimie
28 rue Saint Dominique
75007 Paris
Tel: 01 44 18 95 53
Fax: 01 45 50 46 10
E-mail: adebio@wanadoo.fr
Web: www.adebio.org
President: M. Marc CHOPPLET

Official trade federation for biotechnologies.

FRANCE BIOTECH

Institut Pasteur
Bâtiment Pasteur - Biotop
28 rue du Docteur Roux
75724 PARIS Cedex 15
Tel: 01 56 58 10 70
Fax: 01 56 58 10 33
E-mail: contact@france-biotech.org
Web: www.france-biotech.org
Contact: Mlle Angelita De FRANCISCO – Secrétaire Générale (Executive Secretary)

French Association for the Development of Biotechnology Industry.

Trade Federations in the Dental Sector

ADF (ASSOCIATION DENTAIRE FRANCAISE)

7 rue Mariotte
75017 Paris
Tel: 01 58 22 17 10
Fax: 01 58 22 17 40
E-mail: adf@adf.asso.fr
Web: www.adf.asso.fr
Directors: M. Patrick HESCOT and M. Michel Chabre

COMIDENT

8 rue Blanche
75009 Paris
Tel: 01 48 74 11 08
Fax: 01 42 85 20 32
Web: www.comident.asso.fr
President: M. Bernard SCHNEIDER

UNPPD (UNION NATIONALE PATRONALE DES PROTHESISTES DENTAIRES)

80-82 rue de la Roquette
75011 Paris
Tel: 01 49 29 46 29
Fax: 01 49 29 46 26
Web: www.unppd.org
President: M. Gérard CORSI

Trade Federation for hospitals in the public sector**FEDERATION HOSPITALIERE DE FRANCE (FHF)**

33, avenue d'Italie
75013 PARIS
Tel: 01 44 06 84 44
Fax: 01 44 06 84 45
Web: www.fhf.fr
President: M. Claude EVIN
Délégué Général (General Secretary): M. Gérard VINCENT

Federation gathering 10 regional associations, including more than 1,000 hospitals and as many social and medical care institutions, i.e. the majority of the public sector's establishments.

Trade Federations for hospitals in the private sector**FEDERATION DE L'HOSPITALISATION PRIVEE (FHP)**

81, rue Monceau
75008 PARIS
Tel: 01 53 83 56 56
Fax: 01 53 83 56 50
E-mail: Service Communication (Mme Brigitte DELALANDE): brigitte.delalande@fhp.fr
Web: www.fhp.fr
President: M. Max PONSEILLE

FEDERATION DES ETABLISSEMENTS HOSPITALIERS ET D'ASSISTANCE PRIVES (FEHAP)

179, rue Lourmel
75015 PARIS
Tel: 01 53 98 95 00
Fax: 01 53 98 95 02
E-mail: contact@fehap.fr
Web: www.fehap.fr

Ministries and Official Bodies

MINISTERE DE L'INDUSTRIE

Immeuble Le Bervil

DIGITIP 2

12 rue Villiot

75572 PARIS Cedex 12

Tel: 01 53 44 92 82

Fax: 01 53 44 91 72

Contact: M. Gérard MATHIEU – Chargé de Mission Biotechnologies
(Head of Mission for Biotechnologies)

Web: www.industrie.gouv.fr

Or: <http://www.industrie.gouv.fr/FranceTech/index.html>

The Ministry of Industry and Technology is part of the “Ministry of Finances, Economy and Industry”.

MINISTERE DE LA SANTE ET DE LA PROTECTION SOCIALE

Direction de la Pharmacie et du Médicament

1 Place Fontenoy

75007 Paris

Tel: 01 40 56 60 00

Fax: 01 40 56 56 62

Contact: Mme de SAINT MARTIN

Web: www.sante.gouv.fr

CEPS

8 avenue de Ségur

75007 Paris

Tel: 01 40 56 73 76

Fax: 01 43 06 30 02

President: M. Noël RENAUDIN

French Ministry of Health and Social Protection.

AFSSAPS

(AGENCE FRANCAISE DE SECURITE SANITAIRE DES PRODUITS DE SANTE)

143-145 Boulevard Anatole France

93285 SAINT DENIS Cedex

Tel: 01 55 87 30 00

Fax: 01 55 87 30 82

Web: www.afssaps.sante.fr

Managing Director: M. Jean MARIMBERT

Contact: Mme DENIAU – International Cases Manager

ANNEX 3: TRADE PRESS

L'USINE NOUVELLE

Groupe Industrie Services Information
12-14 rue Médéric
75815 PARIS Cedex 17
Tel: 01 56 79 41 00
Fax: 01 56 79 41 71
Editor: M. Jean-Léon VANDOORNE – Directeur de la Rédaction
Web: www.usinenouvelle.com

Weekly, circulation: 64,600

TECHNIQUES HOSPITALIERES

Fédération Hospitalière de France
33 avenue d'Italie
75013 PARIS
Tél: 01 43 13 39 00
Fax: 01 43 13 39 01
E-mail: th.abonnements@fhf.fr

Monthly, circulation: 6,500

LE MONITEUR HOSPITALIER

Groupe Liaisons
1 avenue Edouard-Belin
92856 RUEIL MALMAISON Cedex
Tel: 01 41 29 96 75
Fax: 01 41 29 99 57
Editor: M. Fabrice DESCHAMPS – Rédacteur en Chef
Web: www.moniteurhospitalier.presse.fr

Monthly, circulation: 3,000

DECISION SANTE

Décision & Stratégie Santé (EMR)
18 rue des Huissiers
92526 NEUILLY SUR SEINE
Tel: 01 47 47 72 72
Fax: 01 47 47 71 08
Editor: Dr Gilles NOUSSENBAUM – Rédacteur en Chef
Web: www.decision-sante.com

Fortnightly, circulation: 18,000

LE QUOTIDIEN DU MEDECIN

SESC

140 rue Jules Guesde

92593 LEVALLOIS PERRET Cedex

Tel: 01 41 40 75 00

Fax: 01 41 40 75 80

Editor: M. Richard LISCIA – Directeur de la Rédaction

E-mail: serviceclient@quotimed.com

Web: www.quotimed.com

Daily, circulation: 76,500.

LE MONITEUR DES PHARMACIES ET DES LABORATOIRES

Groupe Liaisons

1 avenue Edouard-Belin

92856 RUEIL MALMAISON CEDEX

Tel: 01 41 29 99 99

Fax: 01 41 29 97 04

Editor: M. Thierry PHILBET – Rédacteur en Chef

Web: www.moniteurpharmacies.com

Weekly, circulation: 30,700.

L'INFIRMIERE MAGAZINE

Groupe Liaisons

1 avenue Edouard-Belin

92856 RUEIL MALMAISON CEDEX

Tel: 01 41 29 99 99

Fax: 01 41 29 97 04

Editor: Mme Françoise ROSENBLATT – Rédactrice en Chef

Web: www.espaceinfirmier.com

Monthly, circulation: 60,000.

ANNEX 4: TRADE EXHIBITIONS

MEDEC

March 2005 in Paris, Porte Maillot ("Palais des Congrès").

Organiser:

SOCIETE 3 E

1 rue du Parc

92395 LEVALLOIS PERRET Cedex

Tel: 01 49 68 56 40

Fax: 01 49 68 56 50

E-mail: contact@lemedec.com

Contact: M. Bruno SOUBIRAN – Commissaire Général (Trade Fair Manager)

Web: www.lemedec.com

Annual exhibition for medical practitioners.

HANDICA

30-31 March and 1 April 2005 in Lyon, Halle Tony Garnier.

Organiser:

PRH

5 rue de la Claire

69009 LYON

Tel: 04 37 64 21 65

Fax: 04 37 64 21 68

Contact: Mr Gilles BARBIER – Commissaire Général (Trade Fair Manager)

Web: www.handica.com

Biennial, general event for the disabled and elderly.

HOPITAL EXPO - INTERMEDICA

25-28 May 2004 in Paris Expo, Porte de Versailles.

Organiser:

PG PROMOTION

119 rue de Crequi

BP 6141

69466 LYON CEDEX 06

Tel: 04 72 83 08 30

Fax: 04 72 83 08 49

E-mail: info@pgpromotion.com

Contact: Mr Bernard GRYNFOGEL – Commissaire Général (Trade Fair Manager)

Web: www.hopitalexpo.com

Major French national event in the healthcare and hospital sector. This exhibition results from the merger of 5 former trade fairs in the medical sector in France : Hopital Expo, Intermédica, Salon du Laboratoire – Bioexpo, Stramed and Hyprotex.

FORUM LABO

March 2006 in Paris CNIT La Défense.

Organiser:

MCI

19 rue d'Athènes

75009 PARIS

Tel: 01 44 53 72 20

Fax: 01 44 53 72 22

Contact: M. Thierry LAUTH – Commissaire Général (Trade Fair Manager)

Web: www.forumlabo.com

Biennial laboratory equipment fair.

URGENCES 2004

7-9 April 2004, in Paris Porte Maillot. The next show will then be in April 2005.

Organiser:

MCO CONGRES

27 rue du Four à Chaux

13007 MARSEILLE

Tel: 04 95 09 38 00

Fax: 04 95 09 38 01

Contact: M. Yves LAMBERT – Commissaire Général (Trade Fair Manager)

Web: www.urgences2004.org

Highly specialised seminar on emergency medical services in France.

INFIRMIER

October 2004 in Paris Expo, Porte de Versailles.

Organiser:

INITIATIVES SANTE

1 avenue Edouard Belin

92856 RUEIL MALMAISON CEDEX

Tel: 01 41 29 77 51

Fax: 01 41 29 77 54

Contact: Mme Christine LAVENIR – Commissaire Général (Trade Fair Manager)

Web: www.espaceinfirmier.com

Annual European nursing fair.

AUTONOMIC

16-18 June 2004 at Paris Expo, Porte de Versailles.

Organiser:

ADES

Centre d'Affaires Le Lugo

15 rue du Docteur Roux

94600 CHOISY LE ROI

Tel: 01 48 00 05 20

Fax: 01 46 81 77 00

E-mail: info@autonomic-expo.com

Contact: Mr Gérard PAILLET – Commissaire Général (Trade Fair Manager)

Web: www.autonomic-expo.com

Biennial European show for disabled and elderly.

GERONT'EXPO

25-27 March 2005 in Paris Expo, Porte de Versailles (dates to be confirmed).

Organiser

PG PROMOTION

119 rue de Créqui

BP 6141

69466 LYON CEDEX 06

Tel: 04 72 83 08 30

Fax: 04 72 83 08 49

Web: www.gerontexpo.com

French biennial exhibition for the elderly.

ANNEX 5: CONSULTANTS IN THE MEDICAL SECTOR

M. Faraj ABDELNOUR – Senior Consultant

QUINTILES

3-5 rue Maurice Ravel
92594 LEVALLOIS-PERRET
Tel : 01 41 27 73 53
Fax : 01 41 27 72 10
Mobile : 06 80 33 63 47

M. Christian BARBIE – General Manager

M&D CONSULTING

1, Cours de la République
69100 LYON
Tel : 04 78 93 71 82
Fax : 04 78 93 71 87
Mobile : 06 80 24 18 09

M. J N BIOT – Président Directeur Général (Chairman and Managing Director)

J.N.B.

65 avenue Victor Hugo
BP 76
69160 TASSIN LA DEMI-LUNE
Tel: 04 72 38 35 40
Fax: 04 72 38 35 49
Tel: 01 47 53 27 60 (Paris)

Mme Geneviève BLIN

Boulevard du Littoral
83420 LA CROIX- VALMER
Tel: 04 94 79 68 84
Mob: 06 85 35 63 94
E-mail: blin-g@wanadoo.fr

Has worked for 15 years at a high level of responsibility for several UK and US based companies involved in the pharmaceutical and medical devices sectors.

M. Bruno FRANCE

FRAVIMED

28 Cours Albert Thomas
69008 LYON
Tel: 04 37 90 55 03
Fax: 04 37 90 55 04

Consultant involved in the pharmaceutical and biomedical sector. They could deal with administrative procedures and help put clinical studies in practice.

Mr Paul HAMPTON

HAMPTON CONSEIL
BP 35
64250 ESPELETTE
Tel: 05 59 93 97 05
Mobile: 06 03 79 26 08
Fax: 05 59 93 97 06
E-mail: paulhampton@compuserve.com

M. and Mme PLANCHE - Consultants

EPIC (Estrada Planche International Consultants)
Bioparc de Vichy
03270 HAUTERIVE
Tel: 04 70 58 48 04
Fax: 04 70 58 48 01
E-mail: gpp.epic.ubm@wanadoo.fr
Web: <http://www.ubm.fr>

They can help with technical issues, as well as marketing legislation and market surveys.

Mr Karl SIMPSON

BENEZECH - SIMPSON
Hameau de Bobon
07610 VION
Tel: 04 75 06 86 30
Fax: 04 75 06 86 33
E-mail : KarlSimpson@compuserve.com

Specialised consultant in biotechnologies.

Dr Martin-Thierry TEBOUL

7 rue Garibaldi
69006 LYON
Tel / Fax: 04 72 44 07 05

GP acting as a marketing consultant for highly technological medical products.
Dr Teboul can help British companies get the AMM (specific marketing authorisation) from French or European official bodies.