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Webinar: Irish Medical Technology Market Access For SMEs

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10 November 2026

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BEFORE WE START: 6Qs YOU MAY BE ASKING

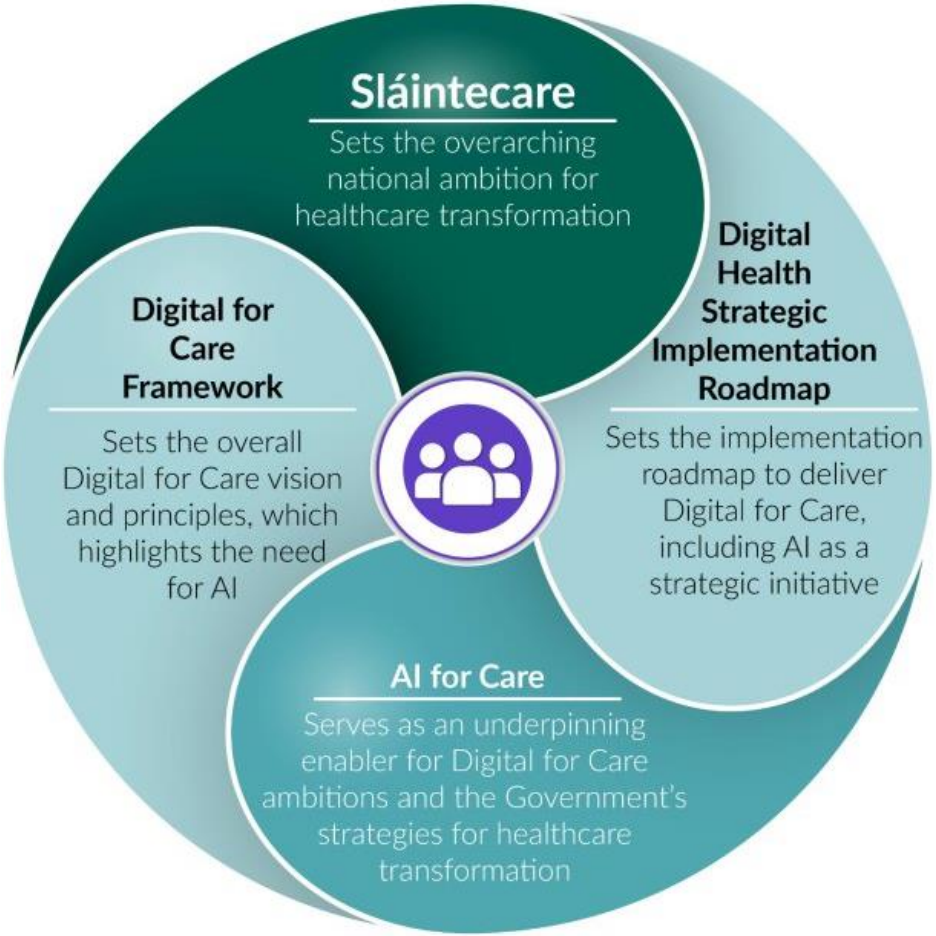
Navigating the Irish Healthcare Market

- Is Ireland the right market for my technology?
- How does the system work?
- Who are the key decision-makers?
- How does market access work?
- How is health technology purchased?
- What should I do first?

ACCESSING THE IRISH HEALTHCARE MARKET

Ireland is one of Europe's leading MedTech locations. However, manufacturing in Ireland and selling into the Irish healthcare system are two very different propositions





ABOUT HEALTHTECH IRELAND





HEALTHTECH IRELAND IS AN INDEPENDENT TRADE ASSOCIATION FOR:

HealthTech Ireland is an independent trade association representing manufacturers, developers and distributors of medical devices, diagnostics, digital health and connected life-sciences products, solutions and services that support and enhance the Irish health system.

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HEALTHTECH IRELAND

Vision

To support our members to make a positive contribution to the Irish economy and healthcare system.

Mission

To advance understanding, collaboration and meaningful engagement between the Irish health system and our members.

Purpose

To enhance the health and wellbeing of all people in Ireland through the deployment of innovative health tech.

LEADERSHIP AND INSIGHTS

NATIONAL

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130 MEMBERS

- Medical Devices
- Diagnostics
- Digital Health
- Connected Life Sciences
- SMEs and Multinationals

INTERNATIONAL

MedTech Europe
from diagnosis to cure

European Commission

GLOBAL

GMTA Global Medical Technology Alliance
Innovating for a Healthier World

World Health Organization

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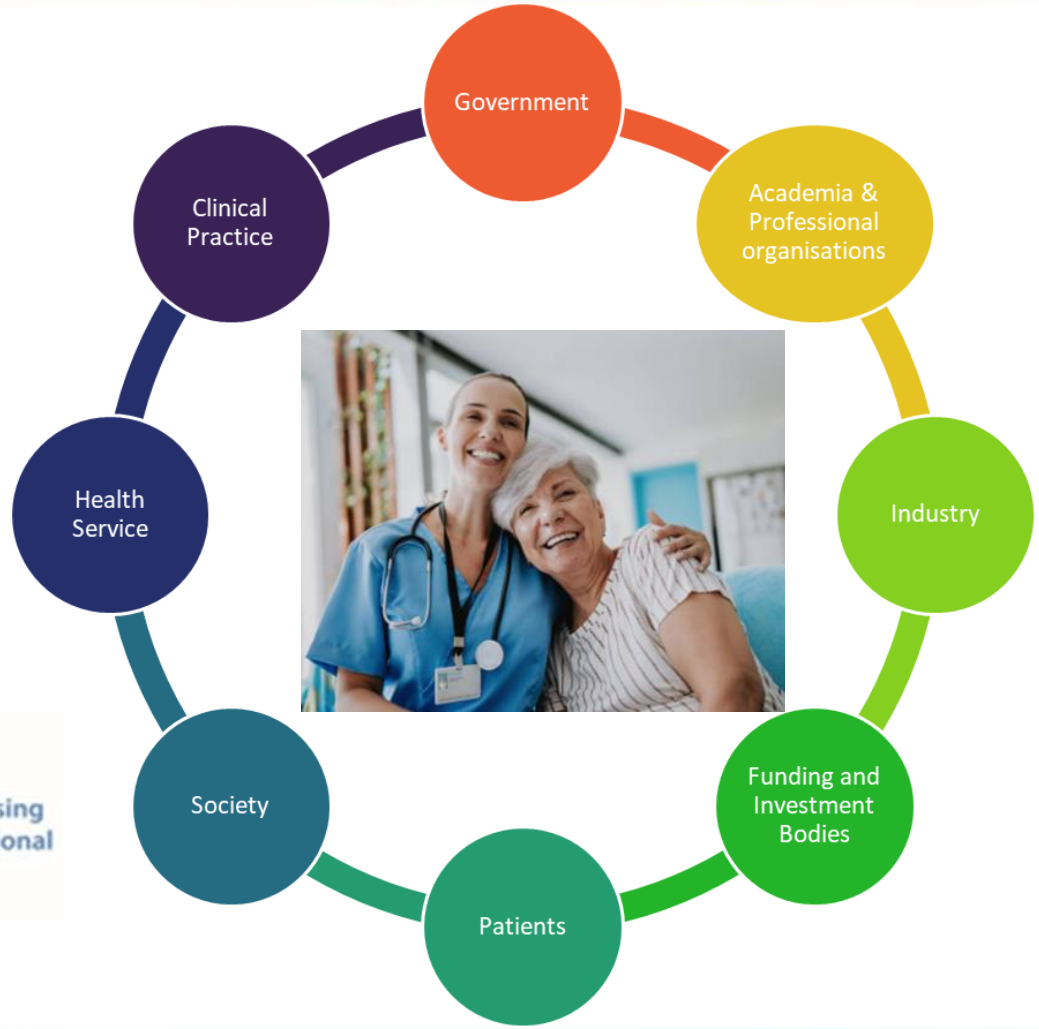
COLLABORATION IN ACTION

Creating Forums For Strategic Partnerships

National Health Collaboration Council

HSE

WHO Collaborating Centre for Nursing Regulation and Continuing Professional Development



RCSI FACULTY OF NURSING & MIDWIFERY

ACSLM Academy of Clinical Science and Laboratory Medicine

BEAI

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INNOVATION THAT IS DELIVERING
Unprecedented strategic cross sector collaboration

NHCC - Established under the HSE–HealthTech Ireland MoU (Nov 2024), provides trusted cross-sector governance to accelerate innovation, strengthen system resilience and improve patient outcomes across Ireland's healthcare system. 5 operational workstreams with governance. *short video on the National Health Collaboration Council (NHCC*

National Health Collaboration Council

1. Procurement
Focus: Green procurement targets, sustainability, supply chain etc.

2. Medical Devices & Diagnostics
Focus: Regulation preparedness, alignment, reform, and resilience.

3. Tech & Transformation
Focus: Digital, AI, data and innovation enablement, collaboration on national strategies.

4. Life Science & Digital Health
Focus: Clinician, nursing alignment and preparedness for digital transformation. Clinically led with system support.

5. Innovation
Focus: Support success and acceleration of scalable innovation adoption. Connect for best practice – cross sector 'Field Trips'. Support implementation.

HealthTech Ireland's Strategic Role accelerating success of national strategies through workshops & engagement. National steering groups – HIQA, HSE, Hospital AI for Care, Digital for care, Sláintecare and climate initiatives.

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SOLID FOUNDATION FOR ENGAGEMENT



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WHY IRELAND MATTERS TO GLOBAL MEDTECH

Ireland is Manufacturing and Exporting Innovation at Scale

- **Established Clusters and Ecosystem Scale**: > 700 life sciences & health tech companies: 14/15 of the world's top medtech and global biopharma firm.
- **Depth and Quality of Talent:** Largest MedTech workforce in EU per capita, >50,000 employed in medical devices and >100,000 in life sciences. Strong skilled STEM graduate pipeline.
- **Access: A**ccess to a 500+ million-person market & Ireland only English-speaking country in the EU
- **Pro-Business and Pro-Innovation Environment:** IDA and EI
- **EI most active life sciences investor globally in 2024**

Ireland is a small country with an extraordinary global health-tech footprint. The challenge is ensuring more of that innovation reaches patients in Ireland.



Ireland at a glance

EU MEMBER SINCE 1973

EURO AREA

A small, open EU economy with global reach

5.53m **population**

April 2026 estimate

16.8% **non-Irish citizens**

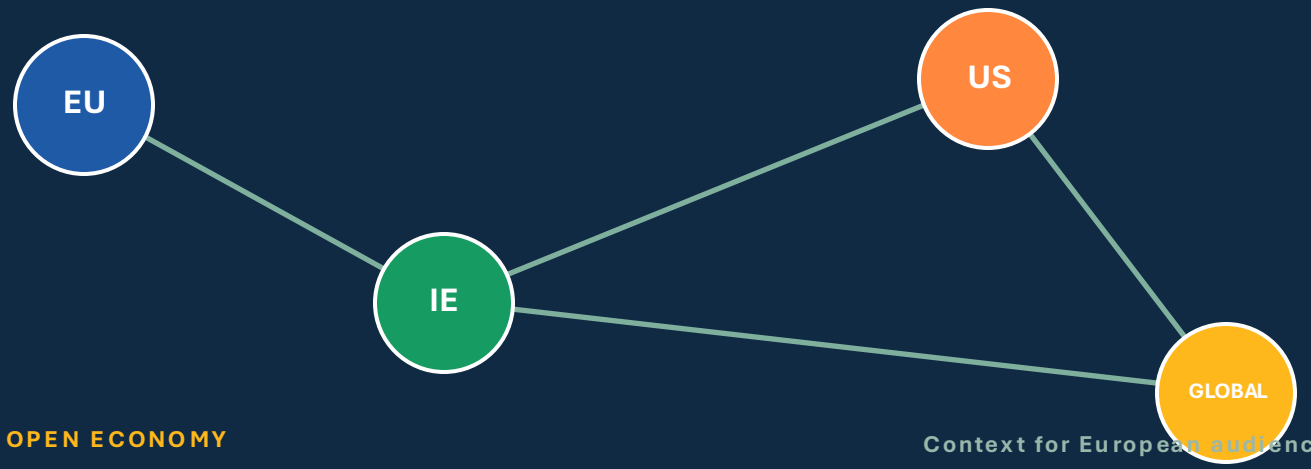
international talent base

2nd **in EU for GDP per capita**

€99,000 in 2025

Globally connected by design

Ireland combines EU market access, transatlantic links and a deep multinational base.



OPEN ECONOMY

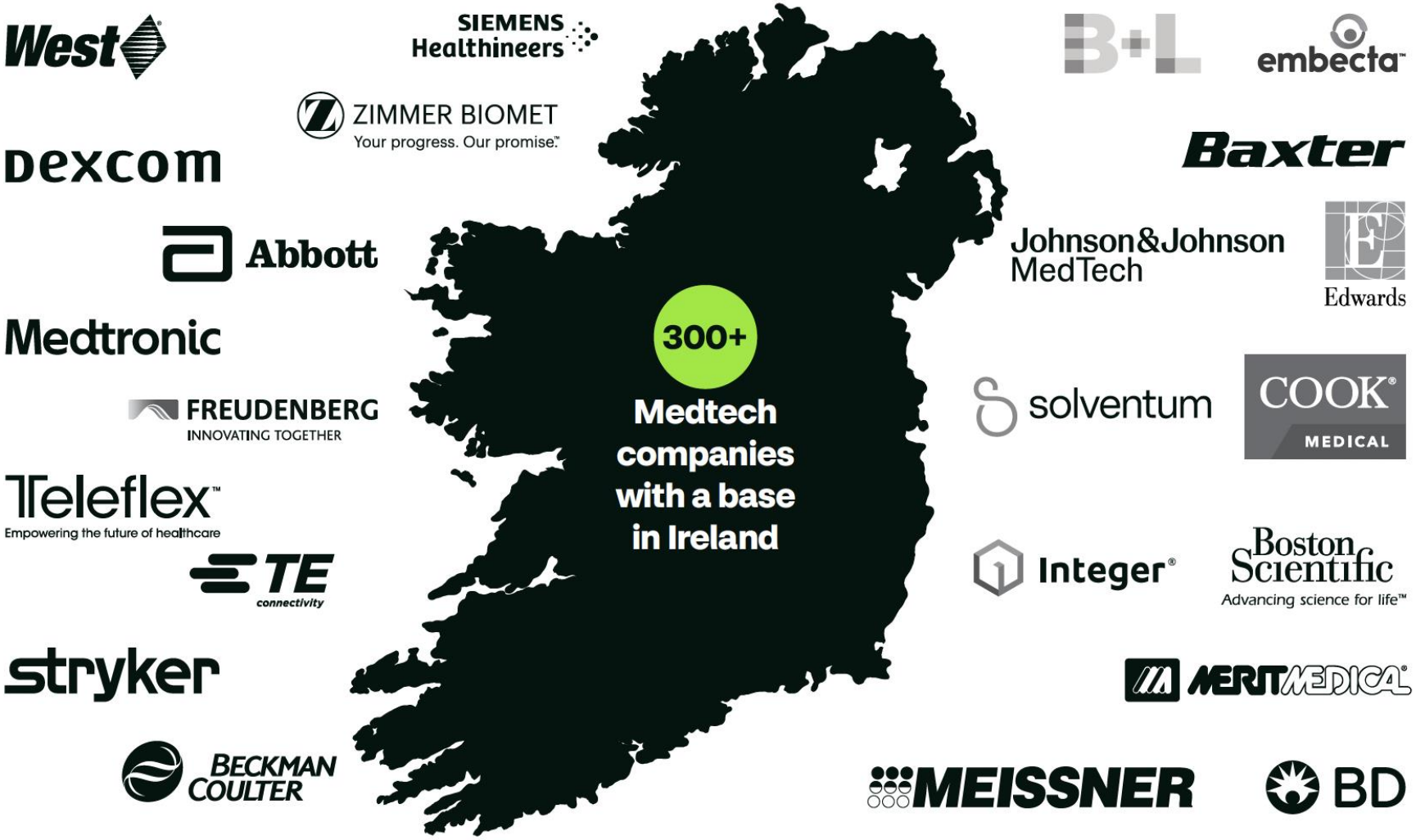
FDI • trade • talent • research

Context for European audiences

Ireland holds the Council of the EU Presidency, Jul–Dec 2026

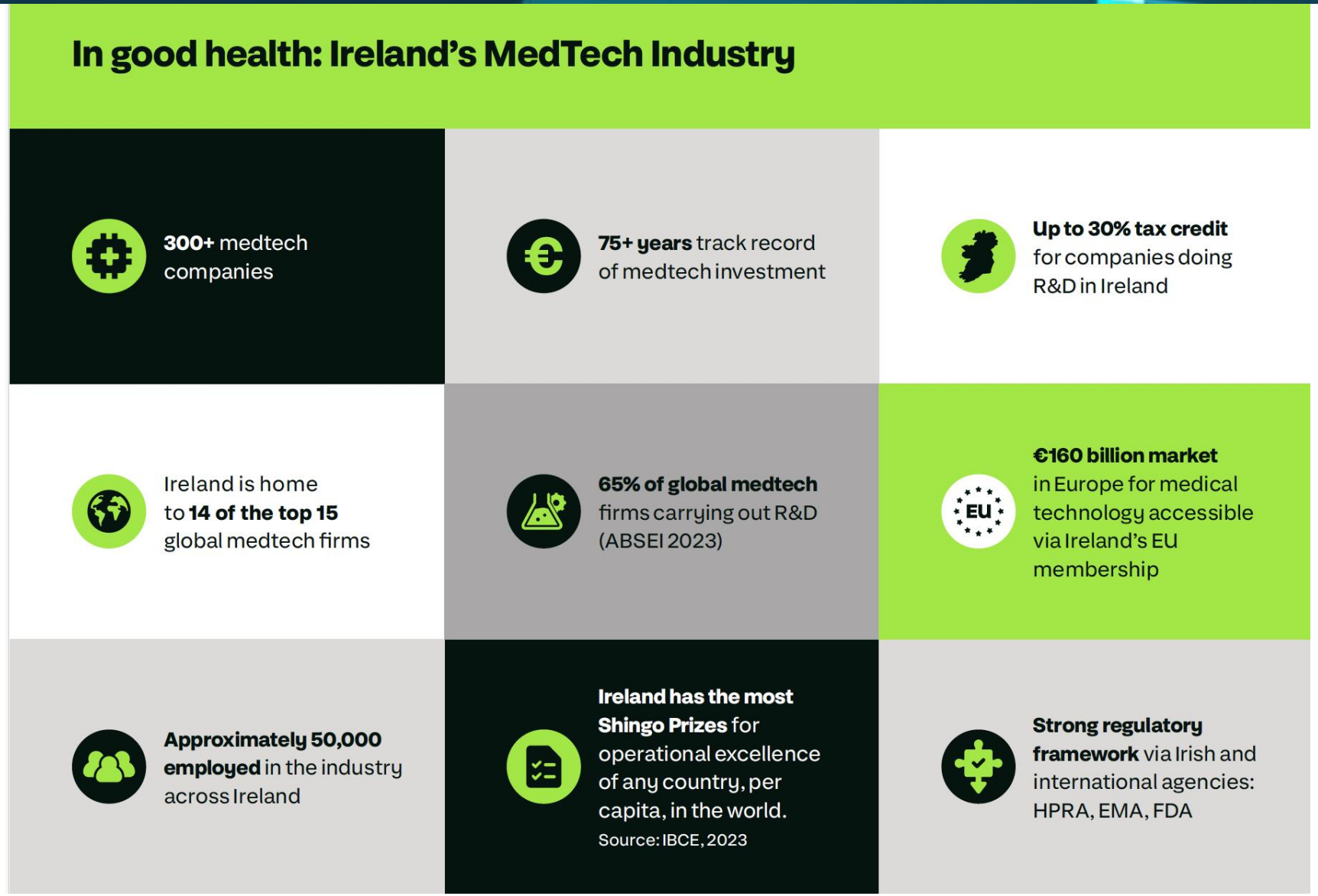
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IRELAND'S MEDTECH SECTOR



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IRELAND'S MEDTECH SECTOR



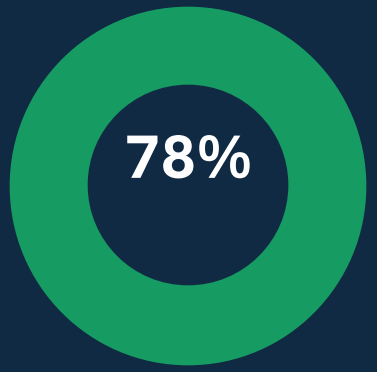
Ireland's MedTech sector: 2025 snapshot
Source: IDA Ireland; latest available industry figures as of 2025.

Healthcare and innovation

A mixed health system alongside a globally significant life sciences base

€36.3bn

current health expenditure in 2024



government financed

22%

households + voluntary schemes (including private health insurance)

11.3% of GNI*

A more meaningful Irish comparator than GDP because of globalisation effects

Life sciences + technology engine

700+

life sciences & health tech companies

€16bn

annual medtech exports

9/10

top global medtech companies present

BIOPHARMA	MEDTECH	DIGITAL	TALENT
Manufacturing + R&D	Devices + diagnostics	AI + health data	Research + skills

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DISTRIBUTORS

- **Ireland is a compact island market.** That makes national coverage relatively manageable from a single Irish base. For an SME, a distributor can potentially provide access across healthcare providers without the company immediately having to build its own national sales, logistics and service organisation.

- **Ireland has longstanding, established healthcare distributors.** For example, one member, started its operation in 1829 and supplies medical devices, medicines and diagnostics across the island of Ireland and the UK.

- **These businesses are much more than wholesalers.** A specialist MedTech distributor provides product specialists, clinical support, tender expertise, logistics, technical servicing, lifecycle support and local market knowledge.

- **Relationships and reputation matter.** In a comparatively small healthcare system, local knowledge of the market, can be particularly valuable. This is where an established distributor can give an incoming SME a significant head start.

- **Many distributors already work with international manufacturers.**

- **Regulation:** Irish-established medical-device distributors must register with the HPRA, and distributors have defined obligations under EU MDR and IVDR. So an experienced distributor can bring familiarity with the regulatory environment as well as commercial reach.

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THE PRESSURES & OPPORTUNITIES SHAPING HEALTHCARE



These pressures also create opportunities for innovative health technologies
that can improve outcomes, increase capacity and support a more sustainable health system.

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THE IRISH ECOSYSTEM AND THE DOORS SME's MAY NEED

SME Question	Relevant Organisation	Website
Who shapes health policy?	Department of Health	https://www.gov.ie/en/department-of-health/
Who delivers public healthcare?	HSE	https://www.hse.ie/
Who regulates medical products?	HPRA	https://www.hpra.ie/
Who supports HTA and quality?	HIQA and NCPE	https://www.hiqa.ie/
Who advertises public tenders?	eTenders and relevant public buyers	https://www.etenders.gov.ie/epps/home.do
Who supports foreign investment?	IDA Ireland	https://www.idaireland.com/
Who supports Irish-owned companies?	Enterprise Ireland	https://www.enterprise-ireland.com/en/
Who supports industry understanding and engagement?	HealthTech Ireland	https://www.healthtechireland.ie/

PUBLIC AND PRIVATE HEALTHCARE

Ireland sits somewhere between:

- A fully public system (like the UK's NHS)
- A fully private system (like the USA)

Public healthcare

- Primarily funded through the State and taxes via the Health Service Executive (HSE)
- Covers GP care if eligible e.g. under 12's and over 70's, hospital treatment, maternity services, and more
- Free or low-cost — Can be waiting lists

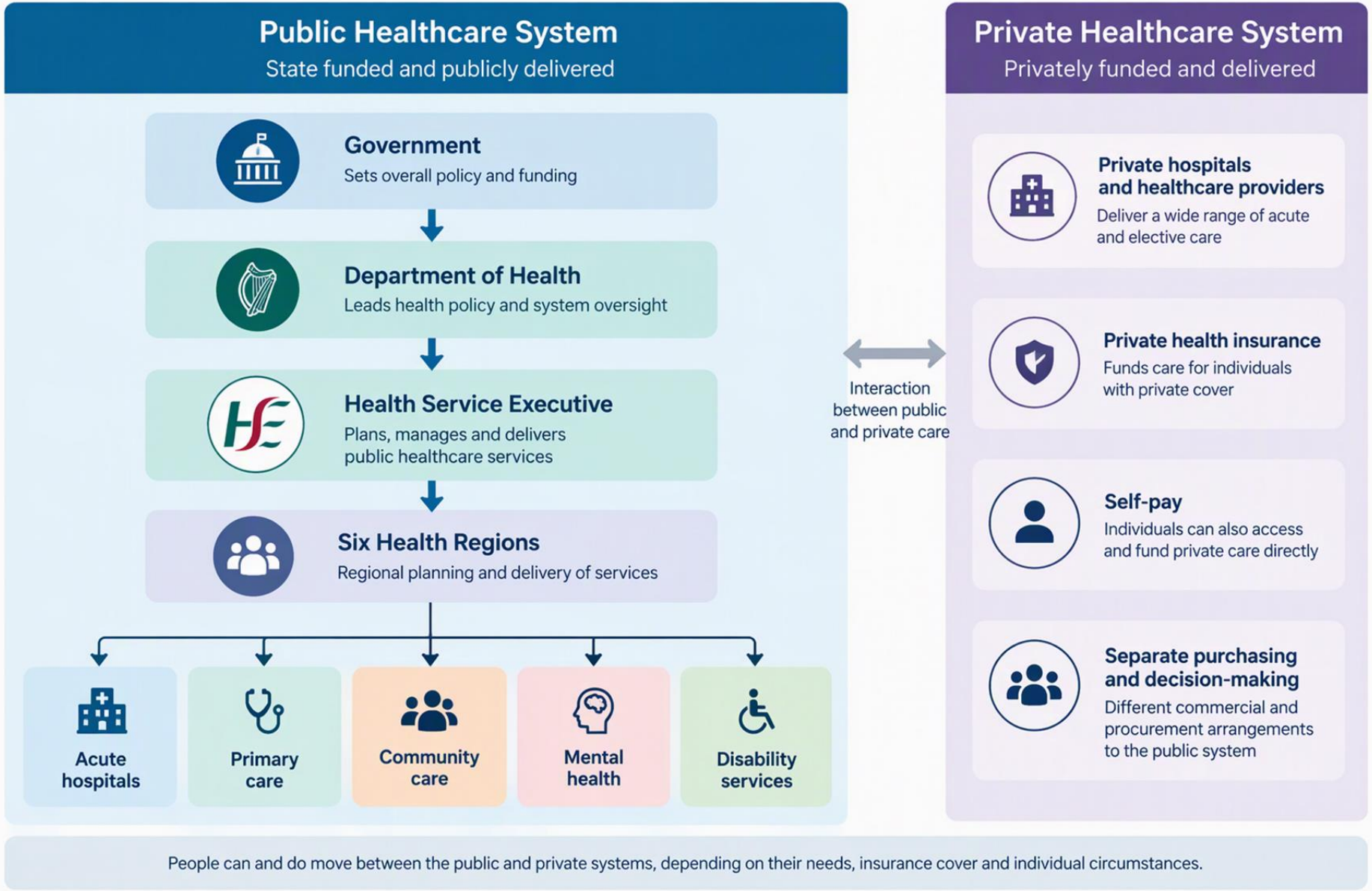
Private healthcare

- Several groups – Bons Secours, UPMC, Blackrock Health and in NI Kingsbridge
- Paid out of pocket or through insurance e.g. VHI, LAYA, LevelOne, Irish Life
- Faster access to consultants and procedures
- More choice over where and who treats you
- Access to private or semi-private rooms
- In terms of purchasing, separate commercial and purchasing decisions

Most (over 52% of Irish citizens) don't choose one system — many people move between both depending on urgency, cost, and availability.

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IRISH HEALTHCARE IN ONE PICTURE



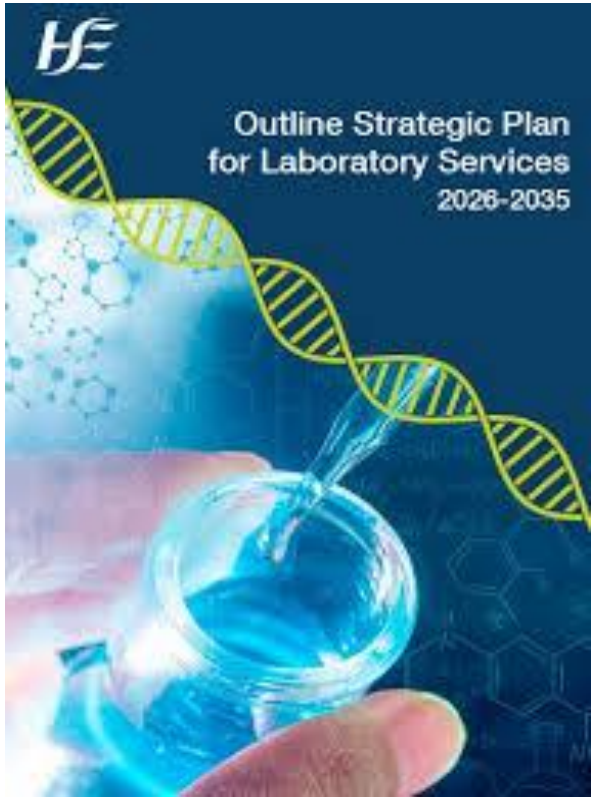
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CONNECTING HEALTH SYSTEM INFRASTRUCTURE

FROM INTENT TO EXECUTION AND ADOPTION









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PATH TO UNIVERSAL HEALTHCARE



Sláintecare 2025+

Sláintecare Vision:
To provide universal, accessible, affordable, **person-centred**, safe and high-quality health and social care for all the people of Ireland.

Sláintecare Mission:
To deliver more timely access, high quality, lower-cost patient care and better health outcomes in partnership with the people who use our services.

Read: Path to Universal Healthcare

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IRELAND'S SIX HEALTH REGIONS

Where Care is Delivered

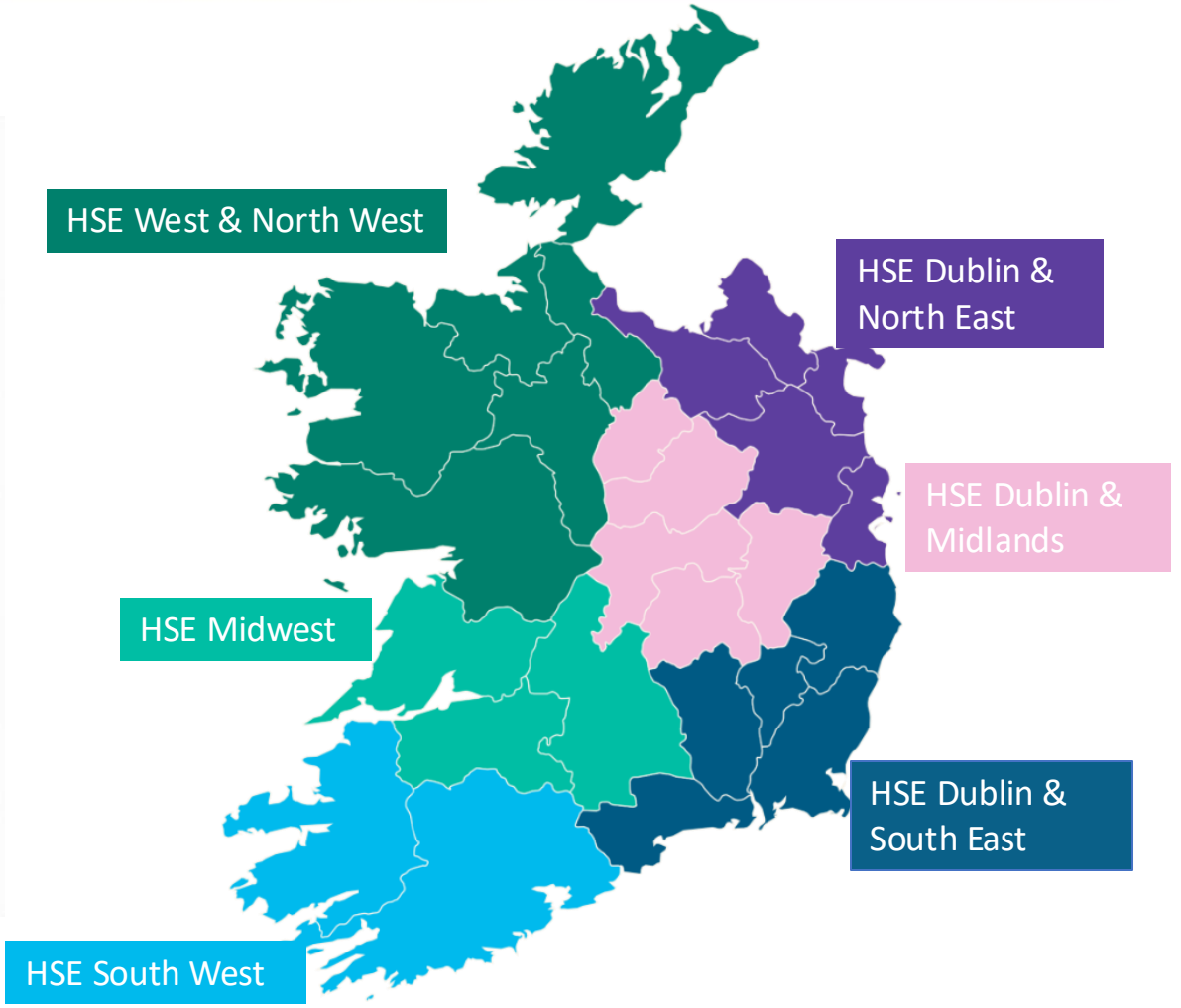
The patient pathway across the Irish health system

People at the centre
Better care. Healthier lives.

Home	Primary Care	Community Care	Acute Hospital	Specialist Care	Home
Self-management Remote monitoring Support and care in the home	GPs Pharmacies Community diagnostics Preventive care	Integrated care teams Public health nursing Rehabilitation Community services	Emergency care Inpatient care Day-case services Surgery and acute treatment	Specialist clinics Centres of excellence Complex and specialised care	Ongoing care Rehabilitation Remote monitoring Better quality of life

Different care settings often have different users, budget holders, decision-makers and procurement pathways.

Understanding where your technology fits within the patient pathway is often the first step in identifying the correct route to market.



LIFE SCIENCE STRATEGY

'Lab Bench to Bedside': Member Inclusive

The Journey so Far





















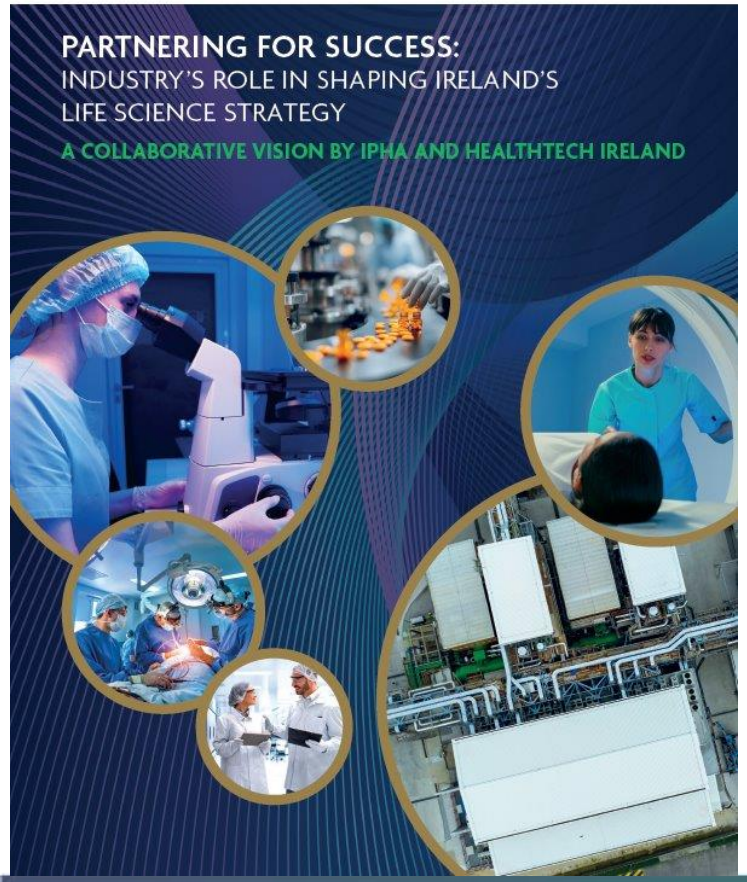






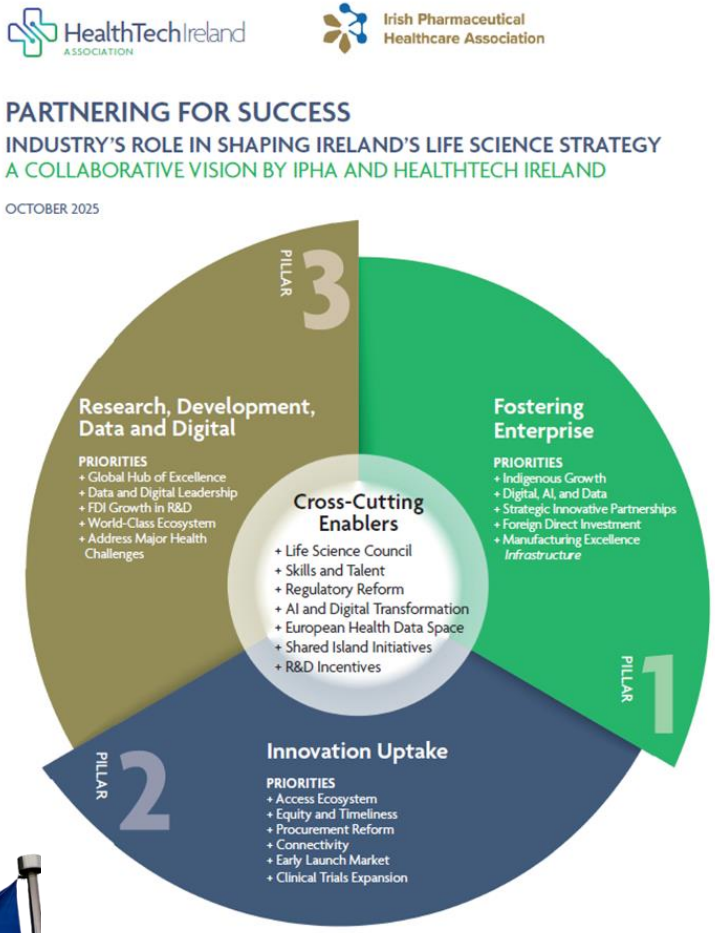
Read the Strategy

INDUSTRY CONTRIBUTION



- ✓ **Draghi Report:** Competitiveness: Procurement Reform, Regulation
- ✓ **Contributions and reports:** HealthTech Ireland & IPHA contribution 170 Companies, international insights, reports, consultation, and workshops
- ✓ **Proven record: Economic and Health Impact – 'Lab Bench to Bedside':** Promoting growth, enhances health outcomes and education positioning Ireland as a leader in transformation.
- ✓ **Long-standing industry support: Teams in labs, in hospitals, nurses in community**





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OPPORTUNITIES & ASKS

- **Council:** A comprehensive public-private forum. Action oriented, outcomes driven national, cross-departmental Forum/ Council with decision authority.
- **Specificity (KVIs):** Themes with metrics
- **Capacity Building:** Embedding key areas upstream in care pathways
- **Clear national innovation adoption pathways to scalability: An innovation framework and Implementation Plan (Later)**
- **Cohesive 'clearing house' for EU Legislation:** Single forum for life science related legislation
- **Accelerate strategy implementation and connected Infrastructure:** Connected data infrastructures and streamlined regulations enable faster, safer technology adoption and improved patient outcomes.
- **Clinically led, system-informed decision-making:** Supported by data, not burdened by it
- **Decisions made earlier in the pathway:** Readiness and predictability

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MARKET ACCESS IN IRELAND

Market access is not one step

A sequential and connected pathway from market entry to patient benefit

Different questions.
Different stakeholders.
All are essential.



1	2	3	4	5
Regulatory approval	**Evidence and assessment**	**Funding or reimbursement**	**Procurement**	**Adoption**
Can it legally be placed on the market?	Should the system adopt it?	Who will pay?	How will it be bought?	Will services and clinicians implement it?
e.g. CE marking (MDR/IVDR)	e.g. clinical, economic and service evidence (HTA where applicable)	e.g. hospital budgets, community funding, reimbursement schemes	e.g. tenders, frameworks, mini-competitions, local purchasing	e.g. implementation, training, change management

These stages are connected, but success at one stage does not guarantee success at the next.

A technology may be approved for the market, but still face significant challenges in achieving funding, procurement and adoption.

IRELAND SPECIFIC REGULATORY CONSIDERATIONS

General

1. EU MDR and IVDR framework
2. CE marking
3. HTA
4. Economic-operator responsibilities where relevant
5. Potentially Irish-language considerations where applicable to product information

ICT, Cybersecurity and data requirements may include:

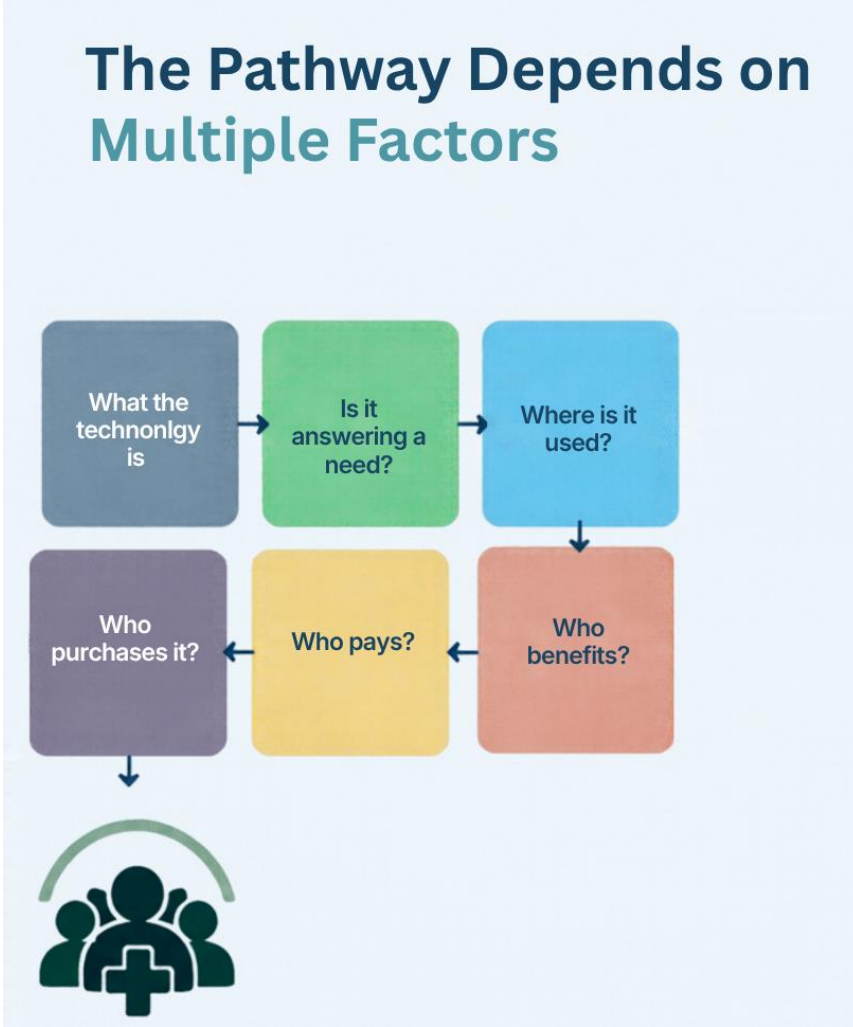
1. HSE Supplier IT Security Assessment Questionnaire
2. Third Party Network Access Agreement
3. Privacy Impact Assessment (PIA) Form where applicable
4. Service Provider Data Processing Agreement

MARKET ACCESS IN IRELAND

There is no single Irish pathway

Routes:

- Hospital-use medical device
- Capital equipment
- Diagnostic or IVD
- Community product
- Digital-health solution
- Technology requiring formal assessment



HOW HEALTH TECHNOLOGIES ARE FUNDED IN IRELAND

1. Hospital or Service Budget

Many medical devices, consumables and clinical technologies are purchased directly from the operational budgets of hospitals, laboratories, community services or other healthcare providers.

Some questions to consider:

- Have I familiarised myself with the Service Plan
- Which service will use the product driven by need
- Who owns the relevant budget
- Whether funding is controlled locally, regionally or nationally
- Whether the product will replace an existing cost or require new funding
- What procurement arrangement will apply

Key consideration: Even where clinicians support a technology, adoption may depend on whether the service has an available budget and authority to purchase it.

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HOW HEALTH TECHNOLOGIES ARE FUNDED IN IRELAND

2. Capital Funded Technologies

Higher-value equipment, infrastructure and major technology investments may require capital approval rather than routine operational funding.

This can apply to:

- Imaging and diagnostic equipment
- Laboratory systems
- Surgical equipment
- Major hospital infrastructure
- Large-scale digital or connected-health platforms

The decision may require a formal business case covering:

- Initial purchase price
- Installation and infrastructure
- Maintenance and servicing
- Staffing and training
- Consumables
- Expected lifespan
- Replacement planning
- Total cost of ownership

- **Key consideration:** Funding is annual, but subscriptions run for years. Funding is set each year through the Annual Service Plan. Software is sold as a multi-year subscription. Services often can't commit beyond the current year, and subscriptions sometimes get pushed into capital or one-off budgets that don't fit them. Also, a strong clinical case is not always sufficient. The organisation may also need an approved capital allocation and a procurement route.

HOW HEALTH TECHNOLOGIES ARE FUNDED IN IRELAND

3. Community or Defined Reimbursement Arrangements

Some products used outside hospitals may be funded through established community schemes, defined reimbursement arrangements or specific care programmes.

The route will depend on:

- The type of product
- Patient eligibility
- The relevant clinical pathway
- Professional prescribing or recommendation requirements
- The applicable service or scheme
- Whether the product category is already covered

Key consideration: A product being clinically appropriate does not automatically mean it is included in an existing arrangement. The SME must establish whether there is a defined route, whether the product meets the relevant criteria and whether a new assessment may be required.

HOW HEALTH TECHNOLOGIES ARE FUNDED IN IRELAND

4. Private Purchase or Private Insurance

Technologies used in private hospitals, clinics or other private healthcare settings may be funded through:

- Provider purchasing budgets
- Private health insurance
- Consultant-led services
- Direct patient payment
- Employer-supported healthcare programmes

The commercial pathway may be more direct than in the public system, but SMEs still need to demonstrate clinical value, affordability and operational fit.

Key consideration: Private insurance should not be assumed to cover a technology automatically. Coverage may depend on the procedure, provider contract, patient policy and insurer's terms.

HOW HEALTH TECHNOLOGIES ARE FUNDED IN IRELAND

5. Digital Programmes, Services or Projects

Ireland currently has no national tariff or reimbursement pathway for digital health or remote monitoring.

Digital-health solutions may be funded through transformation programmes, service budgets, innovation initiatives, pilots or time-limited projects rather than a traditional product reimbursement mechanism.

Funding may need to cover:

- Software licences or subscriptions
- Integration and interoperability
- Cybersecurity and data protection
- Implementation support
- Clinical and technical training
- Hosting, maintenance and upgrades
- Evaluation and change management

Key consideration: Note - Pilot funding is not the same as sustainable funding. SMEs should establish what will happen after the initial programme ends and which service will fund long-term deployment.

Ireland innovates well – but adoption needs work

The healthcare innovation journey in Ireland

1

Ideate

Strong

World-class research, talent and a steady pipeline of start-ups.

2

Develop

Strong

An established MedTech base, funding supports and clinical expertise.

3

Evaluate

Strong

Test beds, evaluations the ability to generate evidence.

4

Regulate

Improving

Clinical Trials, EU MDR, EU AI Act, GDPR, CRF, NREC.

5

Adopt & implement

The gap

Few proven solutions scale into routine use across the health system.

This is the part of the journey we need to fix

HSE FRAMEWORK FOR HEALTH INNOVATION

- A strategic framework to enable, support and govern Innovation
- Builds the infrastructure to support innovation
- Ensuring the right structures are in place to innovate safely, ethically and quickly
- Offers national visibility - reducing the potential for duplication
- An agile document that will evolve over time to stay relevant
- Embodies partnership where collaboration is key
- Supports and enables successful innovations to adapt and embed across the diverse health ecosystem

Most importantly

- it will develop a culture where innovation is allowed to flourish safely – where we can nurture curiosity, celebrate learning and make space for bold new ideas

Source: HSE Presentation

HSE FRAMEWORK FOR HEALTH INNOVATION

Ireland's first national **Framework for Health Innovation** was published by the Health Service Executive (HSE) in June 2026 to govern, support, and scale innovations across the country's health and social care system.

Built around six core pillars the framework establishes a shared national roadmap to embed innovation as a standard part of daily healthcare delivery



Figure 1: Innovation Guiding Principles



[Read the Framework]

Implementation Programme Overview

National Health Innovation Steering Group

Health Innovation Framework - Implementation Programme Working Group

PUBLIC PROCUREMENT ROUTE

The procurement route will depend on contract value, purchasing authority, existing frameworks and the category of product or service.

Principal Mechanisms:

- Open tender
- Framework agreement
- Mini-competition under a framework
- Contract drawdown where applicable
- Local purchasing within applicable rules
- Capital-equipment procurement

Where Opportunities Appear:

- Register with eTenders
- Select the correct product and service categories
- Monitor notices and prior information
- Track HSE and relevant procurement information
- Understand whether an opportunity is a framework or an individual contract
- Review qualification and technical requirements early
- Allow sufficient time for clarification and submission
- Prepare implementation and support capability

HSE Corporate Procurement Plan 2025 - 2027

Support service delivery across the health sector

Maintain effective governance and compliance

Achieve greater value for money to support reinvestment into patient care and service delivery

Facilitate environmental, societal and economic objectives through procurement

- Setting the HSE Procurement strategic direction
- Importance of ensuring value for money and attaining savings where possible
- Strengthening procurement support for Health Regions
- Progressing green public procurement
- Increasing compliance
- Digital transformation

HSE Green Procurement Strategic Framework

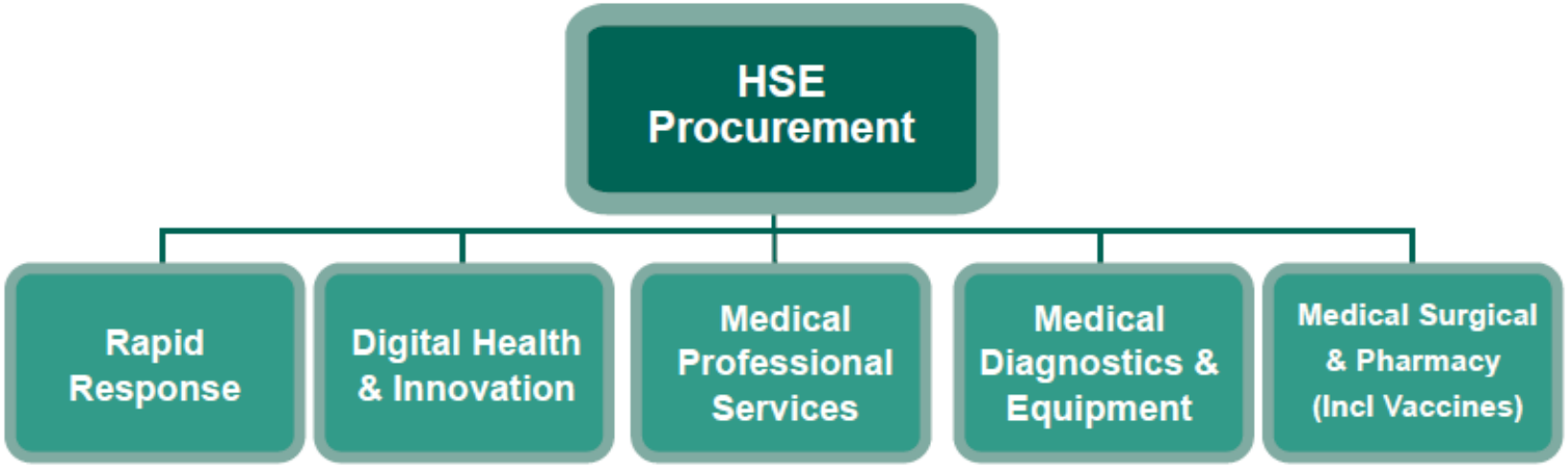
HSE Corporate Procurement Plan

2025 - 2027

Strategic Sourcing & Contracting - Health Sector Procurement

The Government procurement model, driven by a 'One Voice' approach, ensures that the public sector engages with the market in a unified, consistent manner

The HSE leads on the procurement for health sector specific categories and unique health needs which are not addressed within other sector categories



HSE Led Categories

Innovating Healthcare
Memorandum of Understanding



Exploring innovative solutions for improving patient outcomes and healthcare efficiency





Innovation: HSE Procurement – Ways of Working

- *HSE Procurement Digital Health and Innovation Team in place*
- *Working in partnership with*

HSE Technology and Transformation

Health Innovation Hub Ireland

- *Engagement with Cross Border and SME in relation to the public procurement processes*

HIRANI
Advocate ↔ Collaborate ↔ Integrate
Health Innovation Research Alliance Northern Ireland

Health Innovation Hub Ireland - https://hih.ie/ HIRANI - https://www.hira-ni.com/about

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GREEN PROCUREMENT TO REACH SUSTAINABILITY TARGETS

Leadership of the HealthTech Ireland sustainability working group:	
HEALTHBEACON	Marion Briggs, Chair
aws	Thomas Sharkey, Vice Chair
Boston Scientific	Michelle Sullivan
Baxter	Ciara Conway
HealthTech Ireland	Claire Shannon, Healthcare Director

Davy Horizons authors:	
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DAVY	Amy Ward Whelan, Sustainability Business Manager
DAVY	Séamus Higgins, Senior Sustainability Manager
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HealthTech Ireland	HealthTech Ireland Sustainable Working Group
An Roinn Sláinte Department of Health	Colin O'Hehir, Head of Climate Change Unit, Department of Health
An Roinn Sláinte Department of Health	Frank Maughan, Principal, Climate Action and Environment Division, Department of the Environment, Climate and Communications
An Roinn Sláinte Department of Health	Brian Quirke, Circular Economy Strategic Policy Division, Department of the Environment, Climate and Communication
Enterprise Ireland	Garrett Murray and Alexa Toomey, Enterprise Ireland
	Mr Derek Cawley, Spine Surgeon, Irish Doctors for the Environment
HSE	John Swords, National Director of Procurement, HSE
Tallaght University Hospital	Lucy Nugent, CEO TUH
Tallaght University Hospital	Peter Irvine, Head of Procurement and Purchasing TUH
PHILIPS Healthcare	Beatrice Cosgrove, Country Manager, Philips Healthcare

COLLABORATION TO MEET SUSTAINABILITY TARGETS

- HSE National Climate Action Plan
- White paper with 7 key recommendations on next steps
- Public/Private Partnership for centre of excellence



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WORKING IN PARTNERSHIP







A Public/Private Partnership for a Centre of Excellence to deliver Nationally and Internationally aligned Sustainability practices across supply chains.

Sustainable Enterprise Skillnet

20FIFTY PARTNERS

HSE

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2024 – First Public / Private Workshop
Collaborating for Scalable Healthcare Innovation

Identifying blockers and enablers to innovation adoption

Tips for doing business with the HSE

Things to Consider when Tendering

- ✓ Is the requirement clear? If not seek clarification in line with communication protocol specified in the Tender Documents
- ✓ Answer all the questions as fully as possible giving examples and referencing previous relevant experience
- ✓ Be clear and concise
- ✓ Follow the requested format and Instructions to Tenderers
- ✓ Attach all requested documentation and/or sample as requested
- ✓ Make sure to get your tender submission complete and submitted ON TIME



Make sure to register on the eTenders Irish Government's electronic tendering platform administered by the Office of Government Procurement
www.etenders.gov.ie



The platform is a central facility for all public sector contracting authorities to advertise procurement opportunities and award notices



Etenders will flag when contract is advertised or when there is market sounding

If you need technical support please email irish-eproc-helpdesk@eurodyn.com or call 0818 001459 (Ireland) or +353 818001459 (International)

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BRINGING A MEDTECH INNOVATION INTO THE IRISH HEALTHCARE SYSTEM

WHERE TO LOOK

- HSE National Service Plan: understand priorities, pressures and planned areas of service delivery
- Register on eTenders: monitor opportunities and relevant market notices
- Follow HSE procurement information and tender pipelines
- Look for needs around:
  - earlier diagnosis and intervention
  - capacity, productivity and waiting lists
  - workforce-enabling technologies
  - community and home-based care
  - Digital and AI
  - sustainable healthcare

WHEN AN OPPORTUNITY ARISES

- Understand the clinical or system need
- Read the tender requirements carefully and seek clarification where needed
- Demonstrate relevant evidence, value and implementation capability
- Follow the requested format and provide all required documentation
- Understand whether you are bidding for a contract, framework or other procurement route
- Submit on time
- Plan beyond award: implementation, support and potential scale

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BRINGING A MEDTECH INNOVATION INTO THE IRISH HEALTHCARE SYSTEM

- Start with the healthcare need, not the technology.
- Confirm the regulatory position, understand where the technology sits in the care pathway and identify the people who use it, make the decision, control the funding and ultimately purchase it.
- Consider too going direct or a distributor potentially.
- Understand early what evidence will be required and whether there is an established funding or reimbursement route. Then establish the procurement mechanism and, importantly, what implementation will require.
- Think about scale from the beginning.
- The precise pathway will differ by technology, but these questions are remarkably consistent.
- Importantly, do that work before committing significant resources to the market.

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FROM INTENT TO ACTION:IMPLEMENTATION FOR PATIENTS







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Thank You – Q&A

