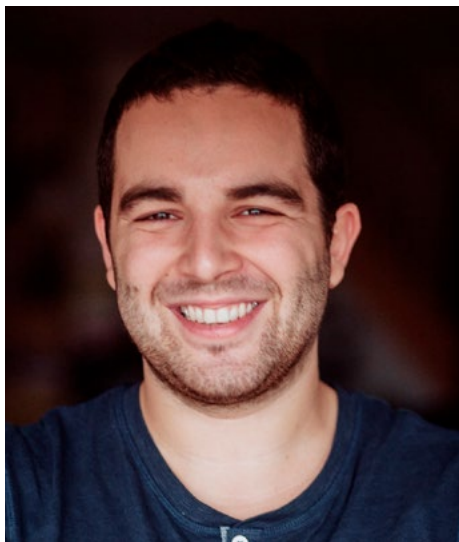# MentalTech Mapping

About the author

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Macroeconomist, he graduated from the Faculty of Economics and Management in Strasbourg. He co-directs the "health and innovation" and "jobs, training, and skills" observatories of the Institut Sapiens. He regularly appears in the media to comment on news related to the work market and innovation-related issues. He is the author of Un robot, mon emploi et moi (Eska, 2019) and Un robot dans ma voiture (Eska, 2020)

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Key findings

1/ The French e-health ecosystem is dense and diverse

French companies are present in all the considered segments, and cover the entire care pathway. This density ensures a certain degree of sovereignty and reduces the risk of penetration by foreign solutions.

2/ The French e-health ecosystem is young

The selected companies are, in average, 4 years and 8 months old.

**3/ E-mental health solutions related to prevention have experienced an unprecedented boom**

Partly attributable to the COVID pandemic, it illustrates a cultural and systemic transformation in favor of prevention, of which mental health is the precursor. The most crowded segment in this category is comprised of startups dealing with mental health in the workplace.

4/ Mental e-health solutions related to recovery are more likely to face external competition

In this area, which also includes diagnostic and early detection solutions, digital therapeutics (DTx) offer attractive development opportunities. Their design and scientific validation make them slower to market. As fewer made-in-France solutions exist, competition from foreign companies is more likely to occur.

5/ Solutions related to support are not very digitalized

Defining a relevant and sustainable business model for this area remains challenging for the digital mental health players and ecosystem. Cause or consequence, this mission is still primarily devolved to associations and caregivers, which explains the lack of solutions in this segment.
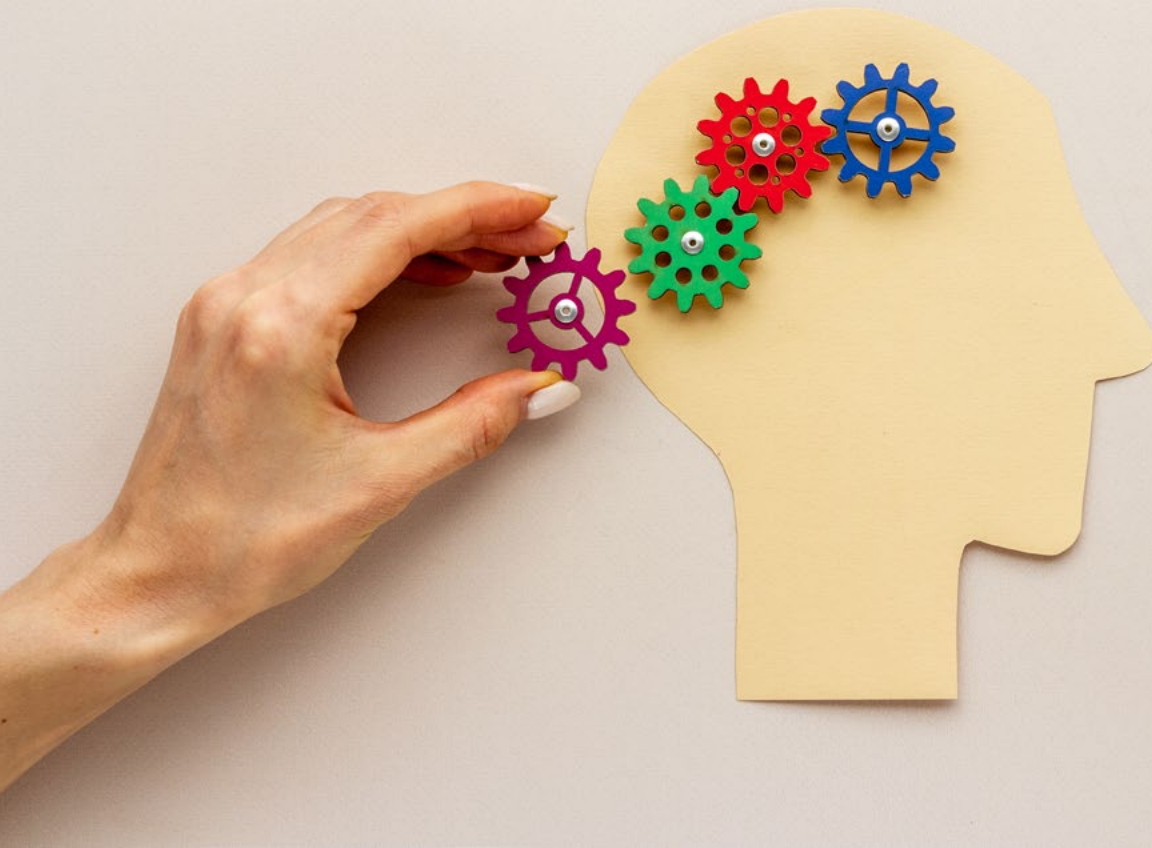
In France, one person out of five will be affected by a mental disorder during lifetime. Such disorders cause many handicaps in these people's private and professional lives, and generate many costs for the French society. Mental disorders cause an estimated loss of 92 billion euros in GDP every year (3.7% of GDP), equivalent to the combined budgets of the French national education, higher education, and research sectors. Technology is the key to curbing this phenomenon. Our study "Digital tools, an opportunity for our mental health" [1] showed that they are the first cause of long-term sick leave and the first cause of disability. Introducing new digital technologies would improve prevention, detection, and management of disorders, allowing the patients in question's early mortality to decrease. The use of innovation in mental health would facilitate access to care, thus increasing the use of therapies whilst improving healthcare professionals' practice.

We can count on a newly emerging but dynamic ecosystem to carry these innovations. In 2021, 120 e-mental health startups were created worldwide. They are positioned on all segments of the care pathway, thus bringing certain robustness to the inherent care system. At the same time, the amount of venture capital funding

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[1]   Published in March 2022, https://www.institutsapiens.fr/observatoire/les-outils-numeriques-une-chance-pour-notre-sante-mentale/

which is essential to the development of the startups has reached $5.5 billion. The dramatic consequences of the explosion of mental health disorders during the first containment has accelerated the creation of companies positioned in this niche, whilst creating great incentives for investors.

While this dynamic is excellent news for patients who see this poor relation of our healthcare system finally valued at its true worth, we can nevertheless deplore the introduction of companies doing "mental washing" in an attempt to capture part of this growth by promoting approaches that are unscientific, and not useful for the care of such pathologies.

This observation led the MentalTech[2] collective, initiated by Qare in partnership with the Institut Sapiens, to carry out this mapping exercise, allowing to identify sufficiently robust and useful French solutions. About sixty companies were selected, which met the following criteria:

- **activity** (they must fall within the field of mental health as their primary activity. For example, applications strictly related to nutrition or relaxation were not taken into account),

- **maturity** (with some exceptions, companies that have been on the market for less than 6 months have not been considered)

- **nationality** (companies must be created and operate in France. Companies that did not have a sound base of operations in France were therefore removed from the list).

Finally, a double classification was applied to the selected companies: their role in the care pathway (x-axis) and the nature of their intervention (y-axis).

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2   www.mentaltech.fr

For the care pathway, the following three dimensions were selected:

- ***Prevention of the onset of pathologies and relapses:*** *Companies proposing to act upstream of the onset of pathologies (primary prevention), and solutions helping patients suffering from an identified pathology not to relapse or aggravate their malaise (tertiary prevention).*

- ***Direct diagnosis, early detection, care, and cure of pathologies:*** *innovations that enable early diagnosis and detection of identified pathologies, as well as direct treatment and cure.*

- ***Support for stakeholders:*** *solutions aimed at helping and relieving patients, caregivers, and healthcare professionals in managing pathologies and the resulting disability, whether temporary or chronic.*

Concerning the nature of interventions, we have chosen a concept which is well-known in the health sector, allowing to differentiate the two following segments:

- *Solutions with a direct mental health purpose or "active principle".*

- *Solutions that facilitate access to care, which were named "adjuvant".*

This dual approach was chosen to emphasize the selected companies' diversity of action, but also to illustrate the intensity of companies present in a given segment. Based on the direct action of the company, this approach allows to point out the ecosystem's areas of improvement. Unlike other rankings, we opted for a dynamic vision of the care pathway, to highlight the potential overlaps that may exist between solutions in order to create a complete support for the patient and the practitioner.
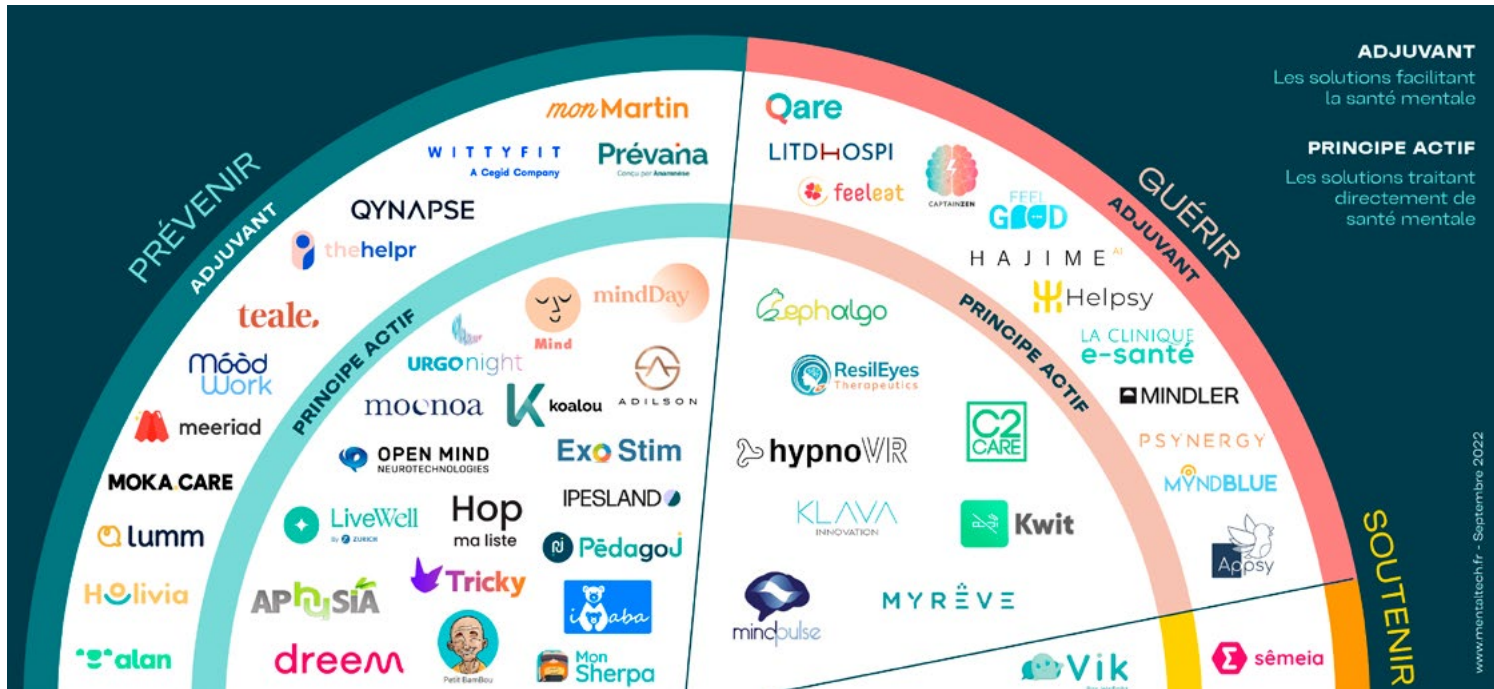
This mapping provides five main insights:

- The six segments of the care pathway that were isolated all include French companies. This illustrates the diversity of the French ecosystem in this area. This densification allows it to be present at all stages of the patient care pathway, intervening in different ways, thus considerably reducing the angles of attack and market penetration for foreign solutions.

- The selected companies have existed for an average of 4 years and 8 months. The French e-health ecosystem can therefore be considered relatively young, even if it is rather dense in its action and activity.

- The segments related to prevention are the most populated, whether on the "adjuvant" or "active principle" side, showing a specialization of the French ecosystem on these dimensions. This element, which could be directly attributed to the COVID pandemic, illustrates a significant cultural evolution of our system, which until then had systematically privileged the curative aspect. Therefore, the mental health sector happens to be at the forefront of this ongoing systemic transformation.

- The segments related to recovery, which also cover diagnostic and early detection solutions, are moderately supplied, particularly for "active ingredients". This means that the outlook for this sector needs to be developed, in particular by accelerating the development of DTx (digital therapeutics) and making greater use of innovation.

- The two segments related to support are the least densely populated in our survey for two reasons. First, this mission is mainly fulfilled by associations and caregivers. The usefulness and effectiveness of their action in this area make the need for developing specific technological solutions in this field less compelling. Secondly, the ecosystem has not yet defined a relevant and sustainable business model in this area. While building bridges with existing influential players, achieving financial success in this area may be a goal for the mental health ecosystem.

Mapping of French e-health companies

The startups	Domain	Description	Release date	Site web
Adilson	Relaxing capsule	In-plant relaxation capsule using technology to reduce user stress and improve sleep and concentration.	2018	https://www.adilson.fr/
Alan Mind	InsurTech	Alan's service allows all employees to take care of their mental health simply and continuously. The application enables employees to be in touch with a professional and access techniques to raise awareness of psychosocial risks.	2021	https://alan.com/hello
Aphysia Developpement	Prevention of chronic diseases	At the origin of the e-health platform "Help yourself". It collects, analyzes, and maps anonymized individual data intended for mutual insurance companies and medico-social establishments to optimize their prevention policy.	2015	https://www.aphysia.com/
Appsy	Accompanying the therapist	Accompany the patient in the search for a practitioner. It facilitates the practitioner to follow and strengthen the link with patients.	2019	https://appsy.fr/

C2Care	Virtual Reality Exposure Therapies	C2Care is a partner of more than 30 university hospitals in France with a range of certified virtual reality exposure therapy (VRET) software. C2Care is mainly involved in phobia, addiction, emotional management, motor and praxis disorders, eating disorders, and neurological disorders.	2015	https://www.c2.care/fr/
CaptainZen	A platform for matching mental health practitioners	An application that matches a patient's symptoms with the right practitioner.	2021	https://captainzen.fr/
Cephalgo	Mood tracker	Allows psychiatrists to remotely monitor the emotional states of their patients in daily life, using discrete electroencephalography and artificial intelligence. Cephalgo is the psychiatrist's assistant to accompany patients toward better mental health.	2020	https://cephalgo.com/
Dreem	Sleep aid	Application combining the knowledge of sleep experts and advanced technologies to help optimize patients' sleep and improve their daily lives.	2015	https://dreem.com/
Exostim	Coaching	Accompanies cognitive management, both in the health pathway of patients and in the desire to prevent the general population from aging well, via assessment games and digitalized training programs.	2014	https://exostim.com/

Feeleat	Eating disorders management	A mobile application featuring a food diary, an emotional diary, and a list of goals to follow to regain a healthy relationship with food.	2017	https://www.fee-leat.fr/
Hajime AI	Accompaniment	Application using AI and behavioral science to accompany people in changing their behavior.	2019	https://hajime-ai.fr/
Helpsy	Teleconsultation platform	A platform promoting access to a teleconsultation with a psychologist or a life coach.	2019	https://www.helpsy.io/
HOLIVIA	Mental health at work	Prevents psychosocial risks (PSR) and improves the performance of organizations by taking care of employees' mental health. The experience is based on support from expert psychologists and self-care programs to raise awareness, remove barriers and improve the anchoring quality of exchanges.	2020	https://www.holi-via.fr/
Hop ma liste	Suicide prevention	Application designed by health professionals at the Angers CHU to help people with suicidal thoughts. The application uses cognitive and behavioral therapy tools to prevent suicidal behavior and thus provides a complementary resource to medical care.	2022	https://hopma-liste.fr/
HypnoVR	DTx (virtual reality hypnosis to treat anxiety disorders and pain)	Virtual reality hypnosis solution. A digital therapy that unleashes the brain's abilities to treat pain and anxiety, limiting the use of sedatives and painkillers.	2018	https://hypnovr.io/fr/

ifeel-good.fr	Remote therapies via Messages, Video, Voice, and Tele-consultations	Secure and easily accessible teleconsultation service via messaging (voice and text).	2021	https://ifeel-good.fr/
IMABA (Pedopsynet)	Online child psy-chiatry	Dematerialized care pathway was set up by the non-profit association Pedopsynet to accompany parents from the first concerns for the child's development. It implies evaluating the child's development, parenthood support, and specific guidance until the care.	2021	https://www.pedopsy.org/
Ipesland	Virtual Reality	Virtual reality technology improves self-awareness and mental life quality, all supervised by a coach.	2020	https://www.ipesland.com/our-concept
KLAVA Innovation	DTx to treat patients suffering from addictive disorders	Quitoxil® is a digital therapy based on artificial intelligence algorithms for nicotine dependence, developed in collaboration with the AP-HP Paul Brousse Addictology Department, headed by Professor Amine Benyamina, and INRIA in Sophia Antipolis. Based on a mobile application, Quitoxil® represents a new form of prescription treatment.	2021	https://klava-innovation.com/fr/

KOALOU	Child emotional health	First digital psychotherapy for children suffering from stress and anxiety. An application that takes care of children's mental and emotional health from 3 to 10 years old. The program prevents stress decompensation by reinforcing children's defenses, regardless of their personalities. It also allows children that are most sensitive to stress (OCD, ADHD, phobias...) to acquire and master therapeutic tools they can use throughout their lives.	2019	https://www.koalou.com/parent
Kwit	Use disorders, Addictive behaviors	Application based on cognitive and behavioral therapies (CBT) and gamification. Kwit accompanies smokers towards quitting and maintains cessation in the long term by integrating cognitive and behavioral interventions.	2012	https://kwit.app/fr
La clinique santé	Online therapy messages (text, audio, video)	This online therapy application allows to quickly consult a psychologist, access self-diagnostics, and exchange messages with a practitioner.	2020	https://www.la-clinique-e-sante.com/
Litdhospi	Search for hospital beds	Solution facilitating the search for hospitalization beds in psychiatry, making the patient's pathway more fluid, and optimizing medical time through better public-private cooperation.	2021	https://litdhospi.fr/

LiveWell	Sleep aid	This French and Swiss e-health solution offers users a holistic way to manage health, including stress management and sleep improvement tools.	2019	https://apps.apple.com/cm/app/li-vewell-your-health-partner/id1556631789
Lumm	Mental health at work	Helps simplify and deepen companies' prevention approaches and empowers employees in their mental wellness endeavors. Thanks to a personalized pedagogical and psychological program, it supports employees, managers, and executives.	2021	https://www.lumm.io/index.php
MEERIAD	Mental health at work	This application provides unlimited access to content designed by mental health professionals. Each employee can take care of his or her mental health, through personalized support, at work or outside of work.	2020	https://www.meeriad.com/
Mind	Meditation	Application de méditation au This meditation application with content designed for all ages reduces stress, facilitates sleep, and improves concentration daily. Also enables companies to better manage their tems well-being at work through meditation.	2018	https://www.mind-app.io/

mindDay	Self-the-rapy app	This digital self-therapy app based on cognitive and behavioral therapies (CBT) offers a personalized program: guided and interactive video lessons and practical exercises to help everyone improve their mental well-being.	2021	https://www.minddday.com/
Mindler	Teleconsultation platform	Application for teleconsultation by videoconference with psychologists. Service includes exercises to complete between each session to improve patient follow-up.	2018	https://mindler-care.com/fr/
MindPulse	Neurocognitive test	Scientific cognitive test that assesses attentional and executive function in 15 minutes. MindPulse works for precision mental health. It provides a breakthrough with more reliable and sensitive detection of cognitive disorders associated with many neurocognitive conditions.	2019	https://itsbrain.mindpulse.net/

moka.care	Mental health at work	moka.care is a corporate mental health solution that supports HR teams, managers, and employees. It combines human support (via individual sessions with psychologists, coaches, and therapists for employees and via ongoing support to HR teams), in-company training, and a digital self-care application. It allows for the care of individuals by deeply transforming the companies they work in.	2020	https://www.moka.care/
MonMartin	Prevention at work	Corporate prevention program supports psychosocial risks, musculoskeletal disorders, and mental health.	2017	https://monmartin.fr/
Mon Sherpa (Qare)	Virtual assistant (chatbot)	Psychological support companion to guide users towards "wellness" daily. Through a chatbot, the application dialogues with the user to identify symptoms and needs, and proposes activities based on cognitive and behavioral therapy techniques.	2019	https://monsherpa.io/

Moodwork	Mental health at work	Digital solution to improve mental health at work. It offers a personalized follow-up service at any time with workplace psychologists, social workers, and certified coaches. This solution allows users to self-assess and measure their feelings of exhaustion or professional collapse, promoting better mental hygiene in the various uses.	2016	https://mood-work.com/
Moonoa	Everyday mental health	Digital solution to promote quality sleep for users. The application analyzes the person's behavior, sleep cycle, physical activity, and diet to improve the behavior of users.	2016	https://www.moonoa.fr/
MyndBlue	AI	Digital therapies based on predictive AI for early detection of complications and relapse of depression and post-traumatic stress disorder. MyndBlue's mission is to help physicians detect and predict problems in real-time to intervene earlier and better treat these disorders.	2015	https://myndblue.ai/
MyReve	Virtual Reality	Solution using virtual reality to help patients overcome deep-seated fears and anxieties independently.	2018	https://myreve.io/

O-Kidia	The mental health platform for children & teens	Platform assessing and tracking children and teens' cognitive, emotional, and behavioral performance to detect mental health disorders.	2022	https://www.o-kidia.com/
Open Mind Neurotechnologies	Neuro-technology platform for human development	A coaching method that makes it possible to make each person an actor in his or her own development thanks to neuroscience, data, and cutting-edge technology inspired by cognitive and behavioral therapies. Its "4P" solutions - preventive, predictive, personalized, and participatory - teach every person to identify and train their emotional management, their ability to adapt to uncertainty and agility, and their way of interacting harmoniously with others.	2016	https://www.omind.me/
PedagoJ	Training and coaching	Training and consulting organizations in cognitive diversity, preventing neurodevelopmental disorders and mental pathologies.	2016	https://www.pedagoj.com/

Petit BamBou	Meditation	Application dedicated to meditation. The proposed programs (attention and concentration, breathing, sexuality and mindfulness, cardiac coherence, relaxation, etc.) are designed to promote a return to psychological balance and prevent mental discomfort. Most of the programs are accessible from the age of 4, thus favoring an education on these themes.	2014	https://www.petitbambou.com/fr/
Prevana (RPS)	Mental health at work	This computer module maps psychosocial risks in companies to identify them very quickly and propose customized solutions to curb them.	2008	https://pro.anamnese.care/rps
Qare	Telemedicine / Teleconsultation	Teleconsultation solution accessible to all patients and all health professionals in about fifty specialties.	2016	https://www.qare.fr/
Qynapse	Neuroimaging	Technology for healthcare professionals, combining MRI and AI to scan synapses, discover mental pathologies and prevent their onset at best.	2015	https://qynapse.com/

ResilEyes Therapeutics	DTx to treat patients with post-traumatic stress disorder	Digital therapy to detect, help diagnose, care for and treat patients with psycho-traumatic syndromes. The company proposes the equivalent of a digital clinic to revolutionize the detection, evaluation, and support of people suffering from post-traumatic stress.	2020	https://www.resileyes.com/
Semeia (MentalWise)	Remote monitoring	Remote monitoring solution for practitioners, taking patient data to alert them to potential problems with their patient, risks of relapse, or non-adherence to care.	2018	https://www.semeia.io/produits/mentalwise/
Teale	Mental Health at Work	Holistic mobile platform for mental health management, offering videos, personalized courses, videoconferences, and training dedicated to mental wellness. The application proposes to calculate a mental health index to understand one's strengths and weaknesses.	2021	https://teale.io/
The Helpr	Resource application for parents	Platform to help parents better understand their infants and thus reduce the inconveniences of parenthood, with the help of guides, podcasts, and parenting paths.	2020	https://thehelpr.fr/

Tricky	Experiential prevention	A company that sets up serious face-to-face and virtual games to raise awareness of the importance of prevention among patients, young people, employees, seniors, and managers. Through their escape room, they develop programs that allow users to change their behaviors by putting them in a situation and giving them live feedback from a professional. Several themes are developed, from mental health to burn-out prevention through vaccination, obesity prevention, or stress management at work.	2019	https://tricky.fr/
Urgonight (UrgoTech)	Sleep aid	Brain training programs solve sleep problems by training the brain's natural ability to sleep well.	2015	https://www.ur-gonight.com/eu-fr/fr/?country=FR
We Fight (Vik Dépression)	Virtual assistant (chatbot)	Virtual assistants accompany patients suffering from depression to help them understand their malaise, accompany them in care and monitor their symptoms.	2016	https://wefight.co/fr-FR

WittyFit	Health at work	Digital platform for capturing and analyzing the objective feelings of employees. Its purpose is to take the "mental pulse" of the company in real time. Team satisfaction is quantified through anonymized data. Policies adapt to correct the lack of fulfillment at work, disengagement of employees, and improve collective performance.	2014	https://wityfit.com/