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Affidea is the leading pan-European provider of **advanced diagnostics (imaging and labs), out-of-hospital services and Centres of Excellence (Cancer Care and Orthopaedics)**

**20** million  
examinations

**13** million  
patients

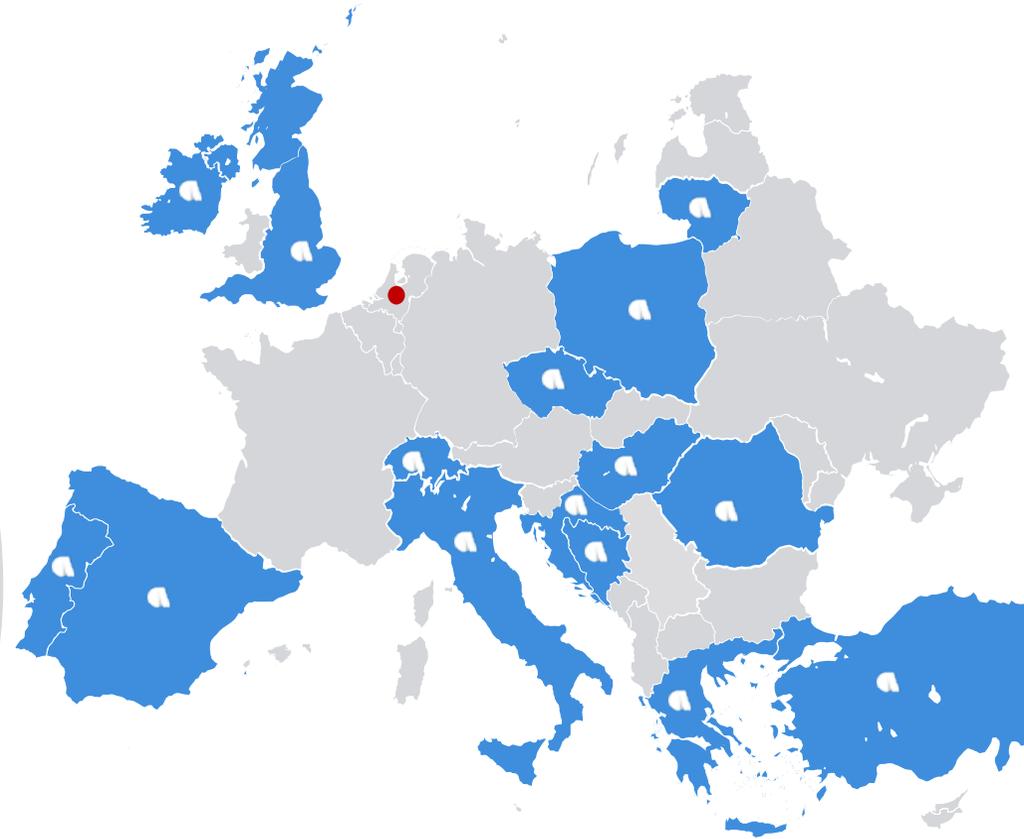
**+13000**  
professionals

**340**  
centers

**15**  
countries

**+8000**  
medical staff

**1,463**  
pieces of equipment

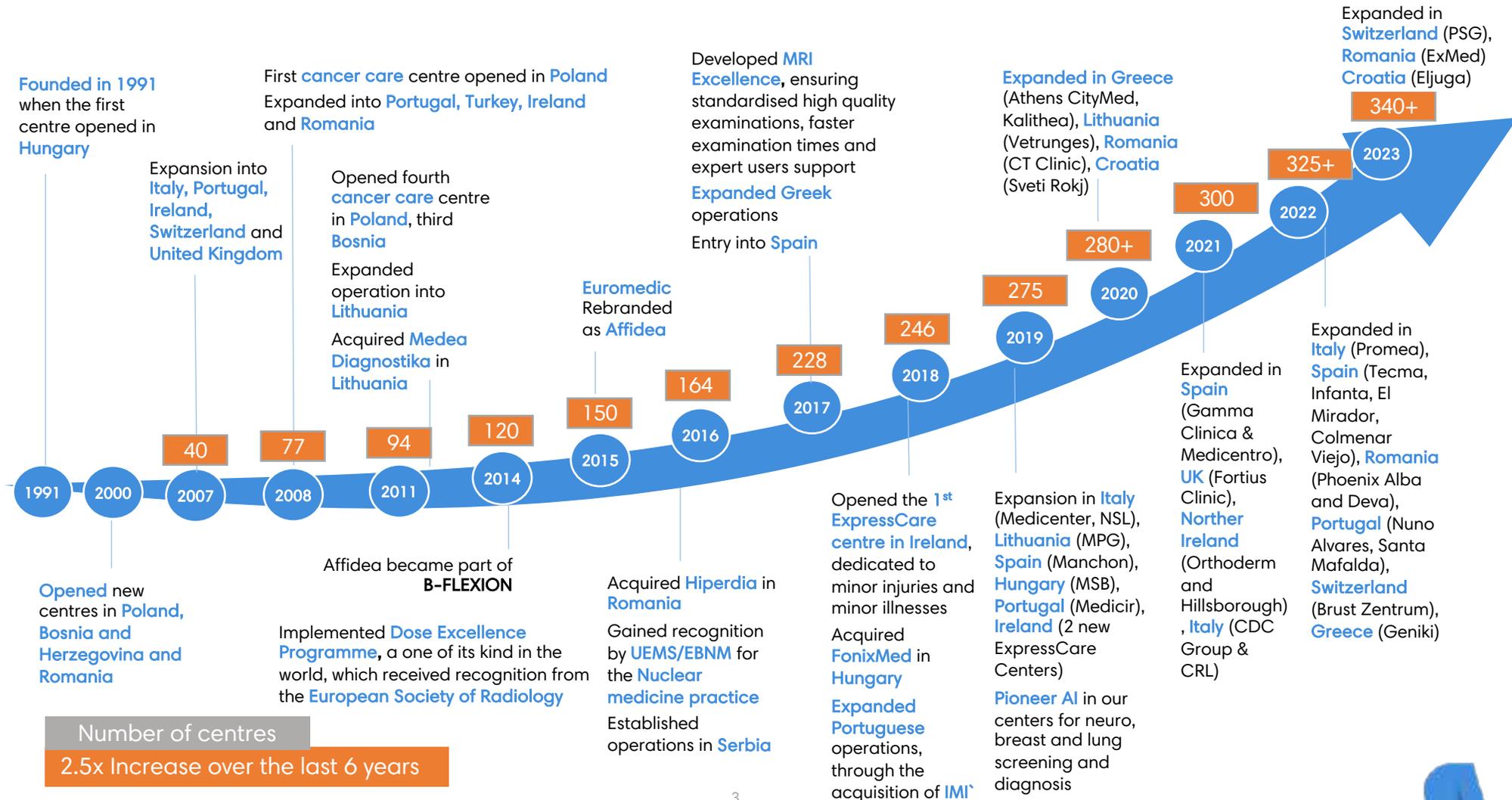


■ Affidea presence ● Headquarters (The Netherlands)



# We have successfully built a **strong healthcare network since 1991**

- Strategic M&A in combination with strong organic growth resulted in an outstanding presence across 340 centres in 15 European countries
- More than 50% growth in the number of centres only in the last 5 years, also diversifying our payor mix between public and private



Affidea has a **diversified business mix across advanced diagnostics, out-of-hospital services and Centres of Excellence (Cancer Care and Orthopaedics)** with a focus on clinical and operational excellence, offering an outstanding customer experience



### Advanced Diagnostics

Complex DI in stand-alone facilities

In-hospital DI services

Clinical Laboratories & Blood collection points

Sub-specialty expertise

Teleradiology

### Out-of-hospital services

Centres of Excellence in different specialties

Polyclinic Model

Specialised centres – eg. Ophthalmology unit

Adjacent services – Home Care, Telemedicine

Day case surgery

### Cancer Care

Radiotherapy

Oncology & Chemotherapy

PET/CT

Nuclear medicine

### Treatments & Follow-up

Express Care Model

Low-complexity Surgeries

# Affidea Case Studies

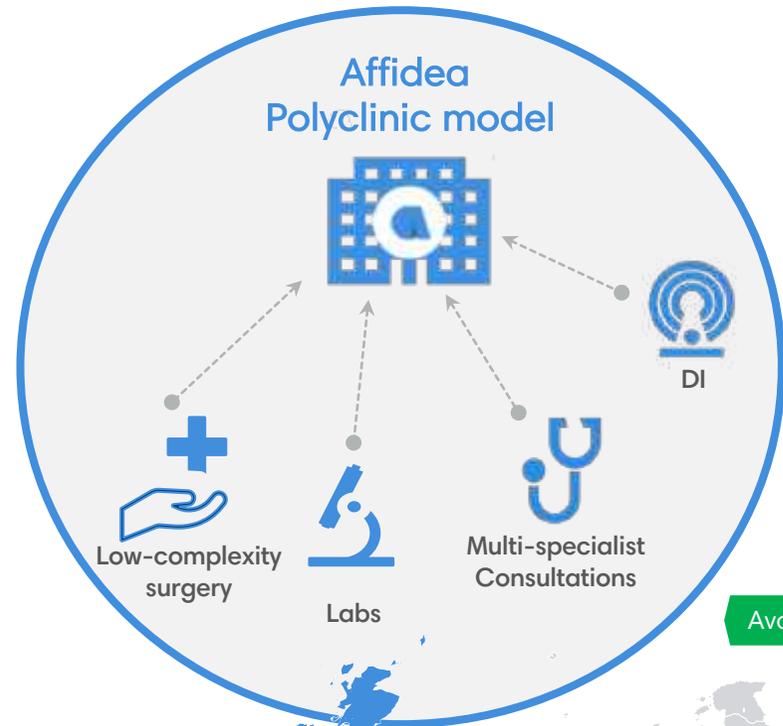


# Affidea Polyclinic model - a variety of specialist consultations backed up by Advanced DI and laboratory analysis for a wide market offering

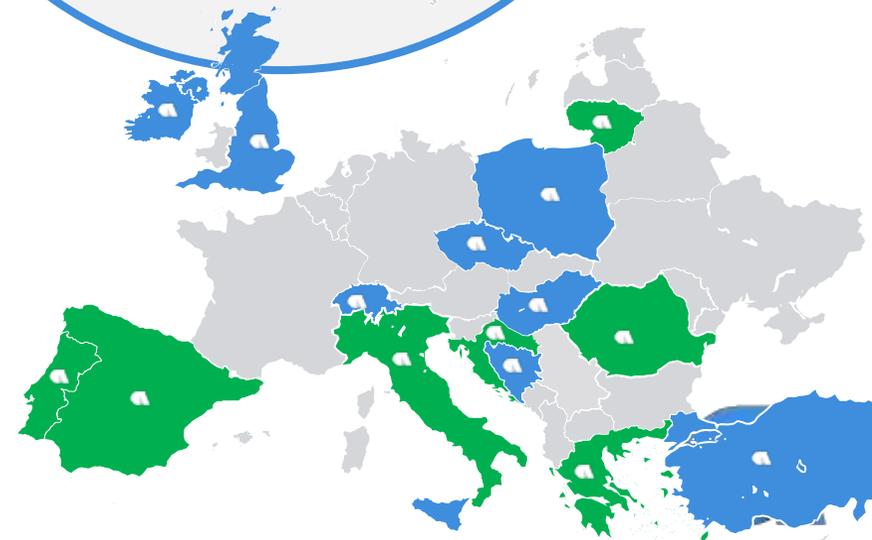
## CASE STUDY AFFIDEA MEDICENTRO, SPAIN

Medicentro offers a wide range of services:

- **outpatient specialties** - family medicine, cardiology, dermatology, gynecology, ophthalmology, traumatology, etc.
- **diagnostic imaging** (MRI, US, X-ray, Mammo and DEXA)
- **laboratory services** (serving as a Blood Collection Points).



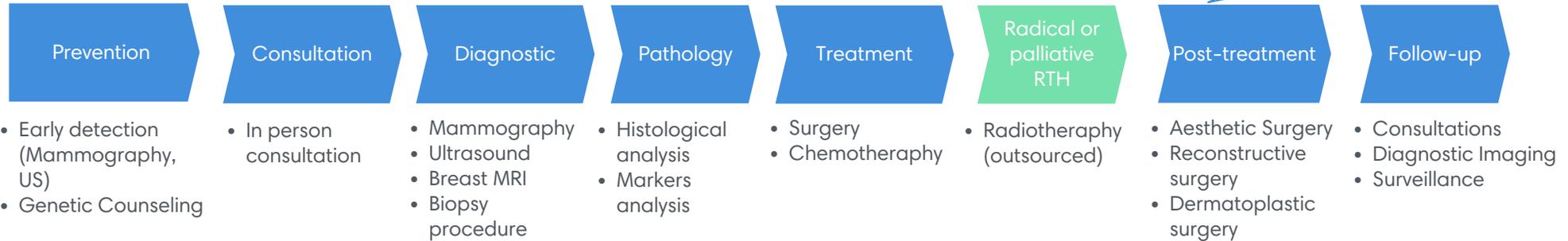
Available at Affidea



# Affidea Centre of Excellence in Breast Cancer – Brust-Zentrum Zurich & Plastic Surgical Reconstructive Group, part of Affidea Group

<< End-to-End Pathway In Breast Cancer >>

Offered at Plastic Surgical Reconstructive Group, part of Affidea since January 2023



## Deep specialisation



Outsourced

Available at Affidea



<< Only by specialising in one thing can you become truly world-class >>

- ✓ **Innovating a full spectrum of orthopaedic care**
- ✓ **True specialists**
- ✓ **Deep specialisation**
- ✓ **World-class Clinical governance**

## Consultations

- Remote
- Face-to-face

## Diagnostics

- 3T MRI/1.5 MRI
- CT
- Ultrasound
- X-ray
- DEXA
- Blood tests

## Treatment

- Orthopaedic surgery
  - Knee
  - Hip
  - Spine
  - Foot and ankle
  - Shoulder and elbow
  - Hand and wrist
- Joint replacement surgery
- Robotic-assisted joint replacement surgery - knee and hip
- Interventional radiology
- Sports and exercise medicine
- Rheumatology
- Pain management
- Podiatry and gait analysis
- Shockwave therapy
- Specialist services
  - Tendon service
  - Health and fitness service

## Rehabilitation

- Inpatient physiotherapy
- Outpatient physiotherapy

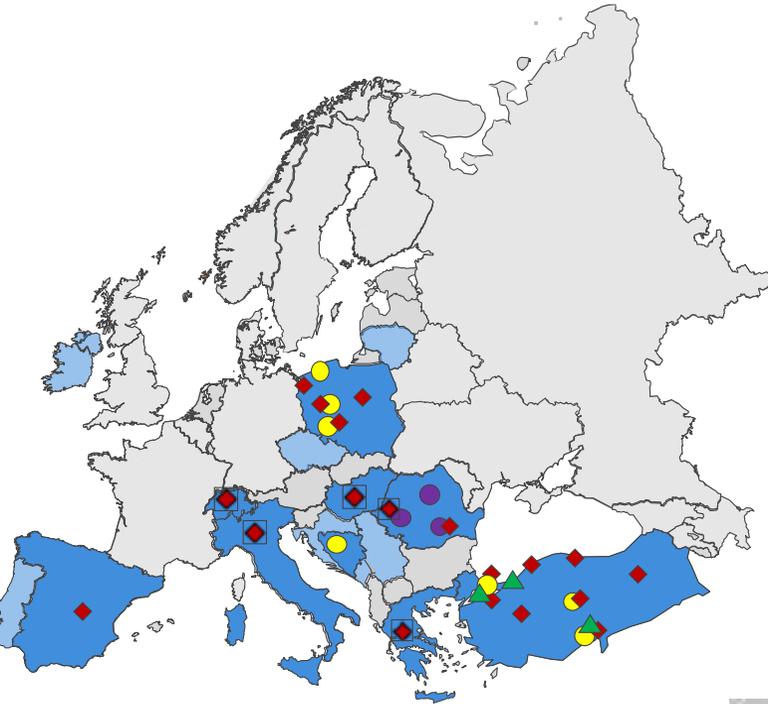
## Elite sports

- 24/7 dedicated bespoke care
- Fast access to consultants
- Confidential service
- Urgent imaging/reporting



# Centres of excellence in Cancer Treatment – Affidea Banja Luka, Bosnia & Affidea Fundeni, Romania

<< an outstanding Cancer Care presence across our network, uniquely positioned >>



- Existing affidea CC markets
- Affidea w/o CC
- RT centre
- PET-CT centre
- Gamma Knife
- Chemotherapy centre

## BOSNIA – Affidea Banja Luka Radiotherapy

- Affidea Cancer Care Centre Banja Luka was recognized as Centre of Excellence in Radiotherapy by **VARIAN** medical systems

- Sub-millimetre precision** in targeting treatment delivery
- Unparalleled ease and speed** with complex radiosurgery treatment completed in less than 10 min
- Real-time tracking of the tumor movement**, with a personalised approach in radiation dose

## ROMANIA – Affidea Fundeni Oncology & Chemotherapy

- Affidea Fundeni Centre was recognized as Centre of Excellence in Oncology by



# Specialised units – We built a network of state-of-the-art specialised units, offering advanced medical procedures – eg **Affidea Promea's Ophthalmology Unit, Italy**

<< *from excellence to extraordinary care* >>

- Affidea Promea Center is a renowned outpatient stand-alone facility in Turin, Italy, offering outpatient services, day surgery and genetics.
- The centre has a **specialized unit in ophthalmology** focused on cataract surgery.



**2500**

patients/year  
for cataract  
surgery



**4**

ophthalmologists

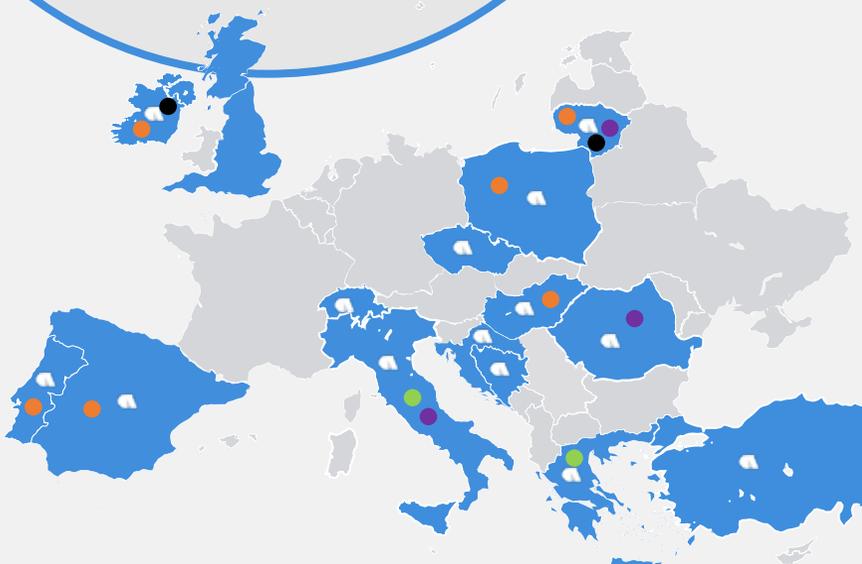
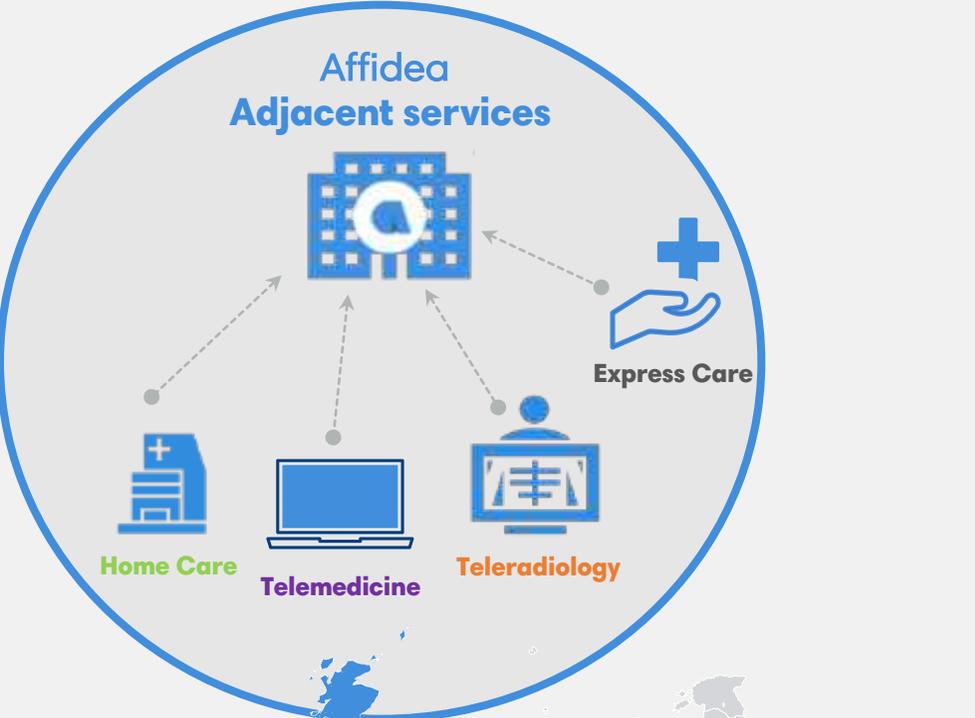


**Advanced techniques**

- Biometer
- Phacoemulsification microscope



**Adjacent services** – To better respond to markets’ demands, we added new services which allow us to see patients from the comfort of their homes or in a fast way at our Express Care Clinics



Access to images anywhere, anytime

Two smartphone screens displaying a mobile application interface. The left screen shows an MRI scan with a control panel at the bottom. The right screen shows a different MRI scan. Below the screens, there is a list of patient information including name, address, and contact details.

MRN	710	10
Address	Address, May	
Phone	01 201 1664	
Phone	0346 09	
Address	01888881 6	

# How we create value **strengthening local presence**



## ...for patients

- End-to-end value proposition
- Breadth of offering
- Top clinicians
- Compassionate care
- State-of-the-art equipment
- Digital engagement



## ...for clinicians

- Broader patient base
- Digital technologies & AI support improving quality & productivity
- Latest technology and facilities
- International Clinical & Quality standards



## ...for payers

- Breadth of offering
- Keeping patients out-of-hospital, lowering costs
- Digital integration
- Transparent cost control



### **OUTSTANDING PATIENT EXPERIENCE & SAFETY**



### **INNOVATIVE MEDICAL TECHNOLOGY**



### **CLINICAL EXCELLENCE**



# Our proprietary asset management knowhow and large-scale partnership with technology vendors ensures we have the latest and youngest technology installed base in Europe

## Overview of asset base



## Vendor partnerships

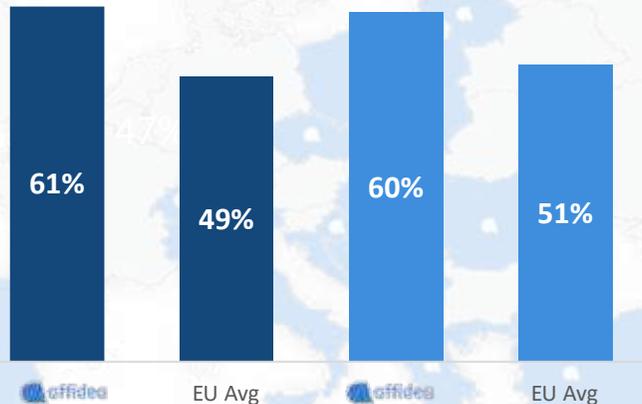
- Affidea is the preferred healthcare provider for medical equipment manufacturers to pilot new technologies
- Piloting ensures access to latest technology even before it is available on the market



## Affidea's equipment base is younger than European average<sup>(1)</sup>

% equipment ≤ 6 years

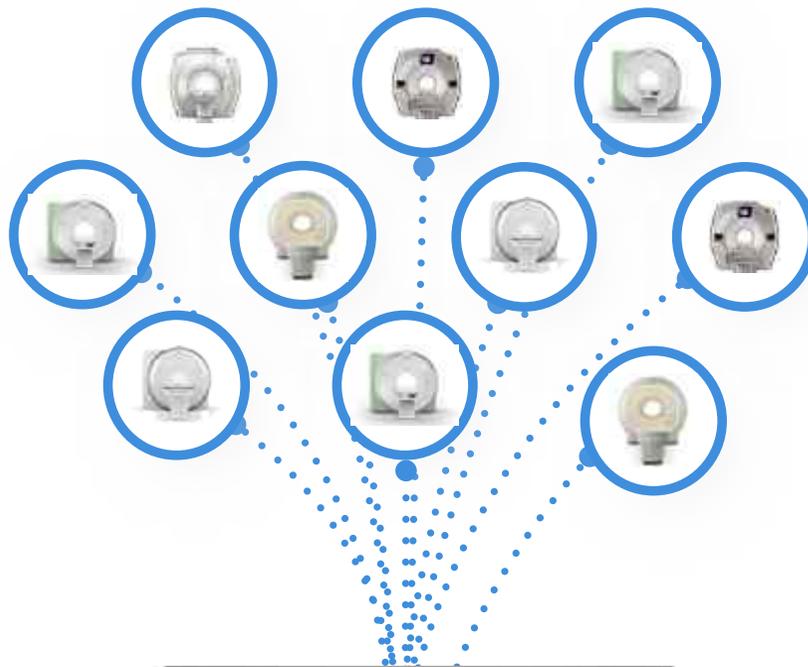
1. Notes: Equipment as at end of 2021 YE.



# Internationally recognised clinical excellence driven by innovative proprietary programmes in MRI & CT

## MRI EXCELLENCE PROGRAM

Largest, global MRI standardisation and optimisation program



<b>11</b> Countries	<b>121</b> MRI Connected	<b>305k</b> Exams Done
<b>+28%</b> Increased productivity	<b>(24)%</b> Decrease asset idle time	<b>+4%</b> Increase in NPS

- Benefits**
- Faster scan time
  - Enhanced quality
  - Protocol and image standardisation for internal teleradiology
  - Improved patient experience

## DOSE EXCELLENCE PROGRAM

■ Largest global program that optimises radiation dose while ensuring appropriate image quality



Awarded by the European Society of Radiology



<b>13</b> Countries	<b>104</b> CT Connected	<b>105</b> Protocols Mapped
<b>40%</b> Reduction Radiation Dose	<b>80%</b> CT exams optimized Dose	<b>75k</b> Scans Per Month

- Benefits**
- Up to 40% reduction in radiation dose
  - Compliance with EURATOM Directive Basic Safety Standards requirements and local legislation



# We have a professional and dedicated clinical governance structure and accreditations from distinguished international medical and academical institutions



Out of total number of centres qualified as 5 stars in Europe by Eurosafes, **90% belong to Affidea**



**All Irish outpatient centers** accredited by Joint Commission international

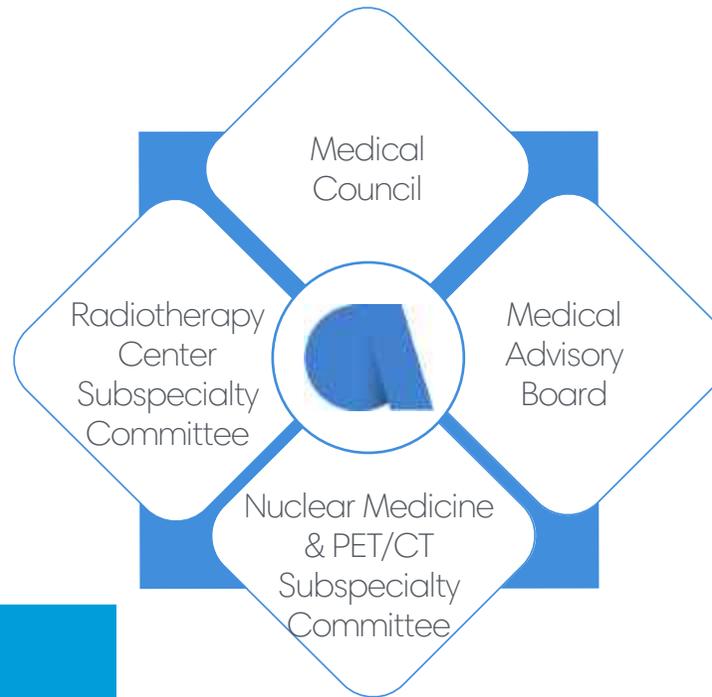


UEMS / EBNM Accreditation for nuclear medicine/ PET CT with **90% centers accredited**



All of Affidea's centres operate under **ISO 9001 quality control standards**

## Rigorous Clinical Governance



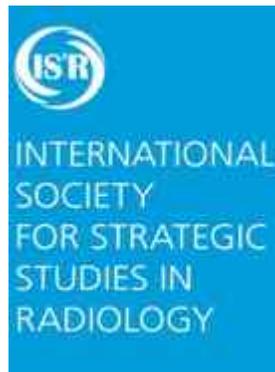
**Prof. Andras Palko**,  
University of Szeged,  
Affidea MAB Chairman

**Prof. Lluís Donoso**,  
Former President of  
IS3R

**Prof. Carlo Catalano**,  
Vicepresident ECR,

**Prof Philip Poortmans**,  
Former President  
European Cancer  
Organisation

**Prof Virgilio Sacchini**  
Deputy Director Breast  
Dept European  
Institute of Oncology



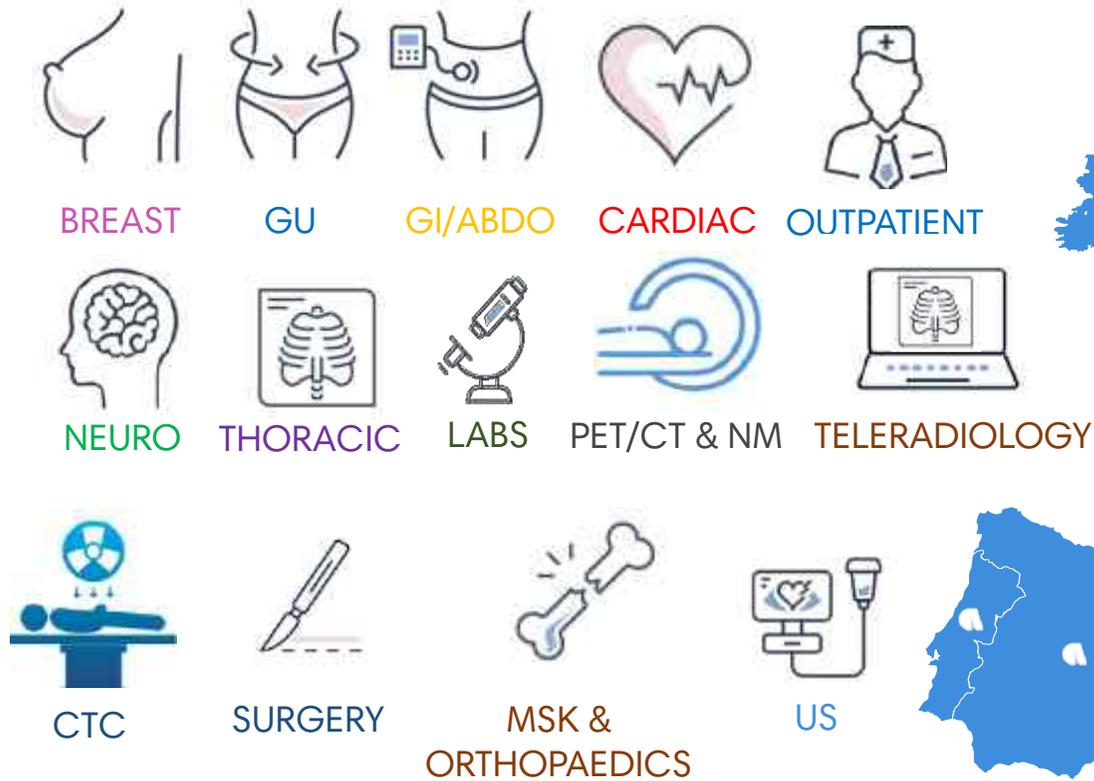
European Society  
of Radiology



European School  
of Radiology



# 14 active sub-specialty groups driving clinical excellence and high-quality standards across the Group



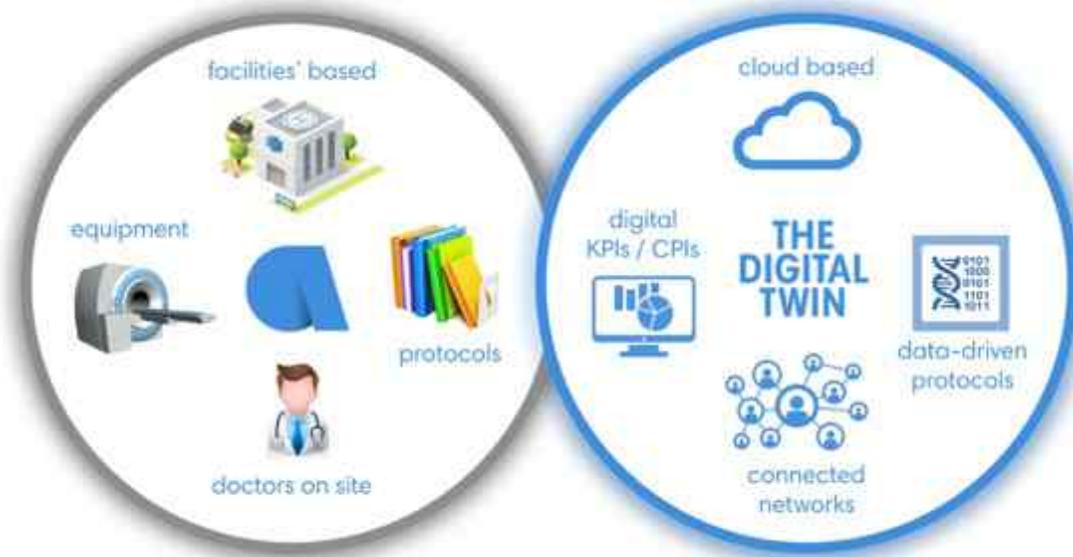
## SUBSPECIALTIES OBJECTIVES



# Big Data and the significant investments that we continually make in digital infrastructure drive customers' engagement, networked radiology, workflow management, operational efficiencies and care standardisation

DIGITALIZED & CONNECTED

EFFICIENCY & GROWTH



## Improving efficiency & quality

- We are trusted with important volumes of data – **20 million** examinations every year.
- We've been **internationally recognized** for our commitment to patient safety and clinical excellence.
- In this respect, we have achieved an average of **40% reduction of the dose level** in CT scans across our network, in the same time maintaining diagnostic confidence
- We've been able to increase productivity while maintaining quality. This results into **lower waiting times and improved patient experience.**
- We lead the way in the implementation of **standardised protocols**, and we share best medical practices to deliver the **highest quality of care** across the continent.



Highly **valuable repository of data** to other stakeholders driving engagement...

Stakeholders are keen to access healthcare data



**Affidea datalake**



Affidea's operations generate a significant amount of data, in a secure and compliant way

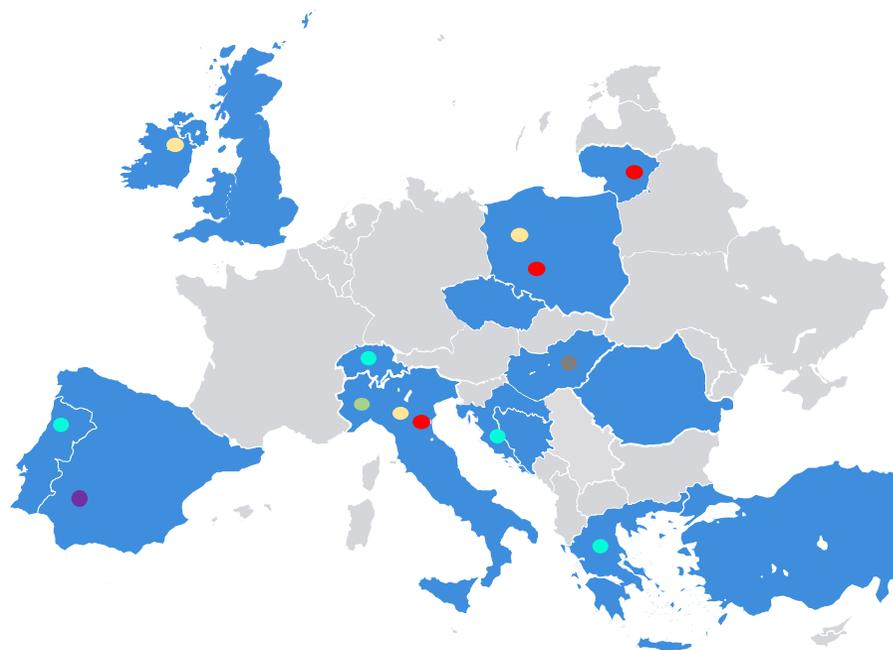
Notes:  
1. Limited Affidea data-generation today  
2. Affidea does not produce this type of data today



# Affidea is **Pioneering Emerging AI solutions** with Clinical, Operational and Commercial Impact

## ARTIFICIAL INTELLIGENCE PROJECTS

Solution	AI Partner	Focus Area	Country
● SubtlePet	SUBTLE MEDICAL	AI algorithms enable the reduction of FDG <sup>(1)</sup> dose and/or scan time	
● Icobrain Dm	icometrix	Cloud-based AI solution to dementia and Alzheimer's disease	
● AIR™ Recon DL	GE Healthcare	Reconstruction algorithm that improves SNR <sup>(2)</sup> and image sharpness, enabling shorter scan times and improved image quality	
● PROView	GE Healthcare	Application to review, assess and report multi-parametric MR prostate exams	
● INCEPTO	INCEPTO	Multi AI solutions folio per site	
● Brainomix	BRAINOMIX	AI for stroke image analysis, and lung diseases such as NSCLC and IPF	



## ARTIFICIAL INTELLIGENCE PROJECT PHASES

### Initiation

Start of the project with pre-assessment, SAR, legal review, budget evaluation

### Implementation

Technical implementation, configuration

### E/B/M

Evaluation, Business Model, Monitoring



**Planning**  
Define Project & establish Team

**Clinical** - Clinical, Operational and Commercial validation



# Artificial Intelligence - Affidea's Success Case Studies



Subtle PET  
Follow up of cancer metastasis. AI algorithm enables the reduction of FDG dose and/or the reduction of scan time maintaining the same outcome



## Enhancing patients' safety while driving operational efficiencies



Increase workflow. Reconstruction DL algorithm that improve SNR and image Sharpness, enabling shorter scan times and image quality



Improve diagnostic accuracy. AI algorithm for detection and measurement of CT lung nodules



Improve diagnostic accuracy. AI algorithm for Brain MRI volume assessment of patient with dementia and Alzheimer's diseases



Improve diagnostic accuracy. AI algorithm for Multi-parametric prostate MR volume and segmentation assessment



workflow improved: up to 20% time saving in the opinion of the surveyed users

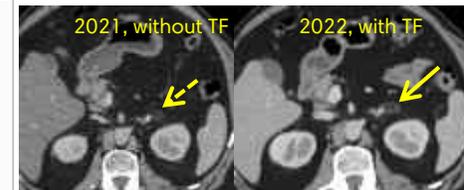
automatically generated report  
100% positive feedback from clinicians



- ✓ Protocol of acquisition-driven AI solution
- ✓ Potential paradigm shift in Radiology
- ✓ Good acceptance by radiologists

**Up to - 68%  
rad/exam**  
**6 Radiologists'**  
**Testimonials**

- With TrueFidelity**
- ✓ **Reduced Radiation dose**
  - ✓ **Enhanced image quality**
    - Reduced noise
    - Tissue homogeneity
    - Lesion conspicuity
    - Preserved contours
    - Reduced streak artefacts
  - ✓ **User Friendly**



Our geographical diversification and our internationally awarded clinical excellence makes Affidea the **preferred provider for leading PHIs, Pharma companies, AI developers and equipment manufacturers.**

We participate in more than 400 Innovative Pharmaceutical Clinical Trials and we partner in more than 300 European Private Health Insurance schemes with industry's global or local market leaders

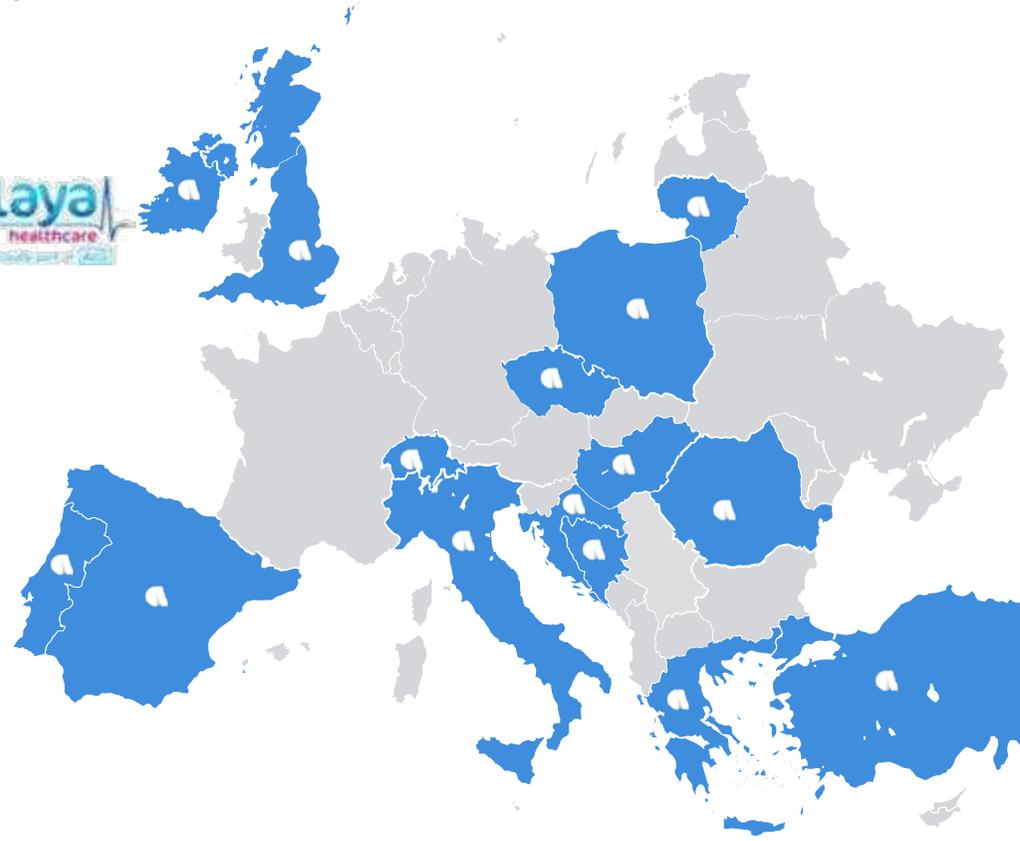
### KEY PHI GLOBAL AND LOCAL PARTNERSHIPS



### KEY PHARMA PARTNERSHIPS:



### DISRUPTIVE PARTNERSHIPS



# Affidea offers **professional development opportunities** for our staff to be ahead of the curve in the healthcare industry

## PROFESSIONAL DEVELOPMENT

### Clinical Academy



- Sub-specialty training for clinical operators
- Advanced post-processing & dose management
- CT & MRI safety
- Clinical research

### Leadership Development



- Online training platform for Affidea Leaders
- Leadership & strategy
- Customer engagement
- Center Managers' Academy
- Individual coaching

### Professional Development



- Training and professional development courses
- Onboarding and compliance training via Virtual Academy
- Webinars and Seminars developed by Subspecialty Group experts for both internal and external doctors

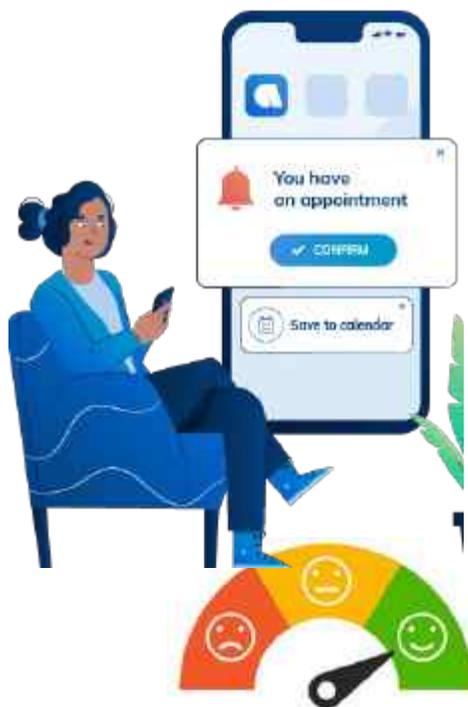
## HIGHLY-SKILLED CLINICAL TEAM

Medical Advisory Board	5 world class experts
Medical Council	18 leading Affidea Country Medical Directors from all Affidea countries
Radiotherapy Subspecialty Committee	12 radiotherapy experts incl. e.g., radiation oncologists, medical physicists
Nuclear Medicine Subspecialty Committee	10 nuclear medicine and PET/CT experts incl. e.g nuclear medicine doctors, medical physicists
Diagnostic & Outpatient Subspecialty Leaders	14 subspecialty group leaders across specialties
Specialised Professionals	~ 4500 doctors
Radiographers & Physicists	+ 1,800 qualified radiographers & physicists
Nurses	~ 1,200 qualified nurses
Laboratory Medical Personnel	+ 400 lab personnel

**7,900**  
Clinical Staff



# Patients' experience is of utmost importance – Affidea offers outstanding standards of care at every step of their journey



## HIGH PATIENTS AND REFERRALS SATISFACTION

**80,58%**

**Patient NPS Score<sup>1</sup>**

**79,8%**

**Referrals NPS Score<sup>2</sup>**

- 1. Patients NPS score refers to the full year 2022 across 15 Affidea countries
- 2. Referrals NPS score refers to the full year 2022 across 13 Affidea countries



We strongly believe that  
—**nothing is more important than health**



In everything we do, we strive to provide access to  
**healthcare delivered with empathy, built on  
professional trust and benefitting from innovation.**