Teleradiology from the Service Provider's Business Perspective

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CT and MRI installed base in Brazil

<table>
<thead>
<tr>
<th>Region</th>
<th>CT</th>
<th>MRI</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>136</td>
<td>59</td>
<td>4.6%</td>
</tr>
<tr>
<td>NE</td>
<td>564</td>
<td>139</td>
<td>19.1%</td>
</tr>
<tr>
<td>MW</td>
<td>241</td>
<td>91</td>
<td>8.2%</td>
</tr>
<tr>
<td>SE</td>
<td>473</td>
<td>198</td>
<td>16.1%</td>
</tr>
<tr>
<td>S</td>
<td>1.532</td>
<td>598</td>
<td>52.1%</td>
</tr>
</tbody>
</table>

Number of equipment

<table>
<thead>
<tr>
<th></th>
<th>MRI</th>
<th>CT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of equipment</td>
<td>1.085</td>
<td>2.946</td>
</tr>
</tbody>
</table>

Source: CNES, August 2010; DATASUS
Modalities growth (%)

Installed base growth

MRI: 23% (2008), 24% (2009)
CT: 11% (2008), 16% (2009)
US: 11% (2008), 12% (2009)
XR: 10% (2008), 12% (2009)
Mammo: 8% (2008), 10% (2009)

Source: CNES, August 2010; DATASUS
Main challenge in the radiology market

- Increased demand for radiologists due to growth in the number of studies
- "Gap"
- Increasing complexity of studies analysis
Case 1

- Imaging center – Hospital
- Rio de Janeiro countryside
- 180,000 inhabitants
- 2 radiologists – 63 years old and 65 years old

Situation:
- Emergency reports – analyzed only by the ordering physician
Case 2

- Outpatient imaging center
- Capital of Northeast’s small State
- 750,000 inhabitants
- 3 radiologists

Situation:
- CT and MRI reports taking 7 days to be delivered
Case 3

- Outpatient imaging center
- Paraná countryside
- 200,000 inhabitants
- 6 radiologists

Situation:
- Heart and breast MRI patients sent to closest reference center – 220km
Case 1

- Before Pró-Laudo:
  - Emergency studies
    ✓ Analyzed only by ordering physician

- After Pró-Laudo:
  - Emergency studies
    ✓ Report delivered - TAT 40 minutes
Case 2

- Before Pró-Laudo:
  - CT and MRI reports – 7 days to be made

- After Pró-Laudo:
  - Reports delivered - TAT 27 hours
  - Result:
    - Better meet the demand
    - Investment on a new MRI equipment
Case 3

- **Before Pró-Laudo:**
  - Heart and breast MRI patients sent to closest reference center – 220km

- **After Pró-Laudo:**
  - Heart and breast MRI reports delivered - TAT 48 hours
Brazil – Present situation

- Less than 5% radiology services using teleradiology
- Green market
- Few professional companies – lot of freelancers and adventurers
- 95% are final reads market
Caution when choosing a provider

- Radiologist team
- SLA
- Technology and security
- Support
- Contract - legal aspects
Thank you!