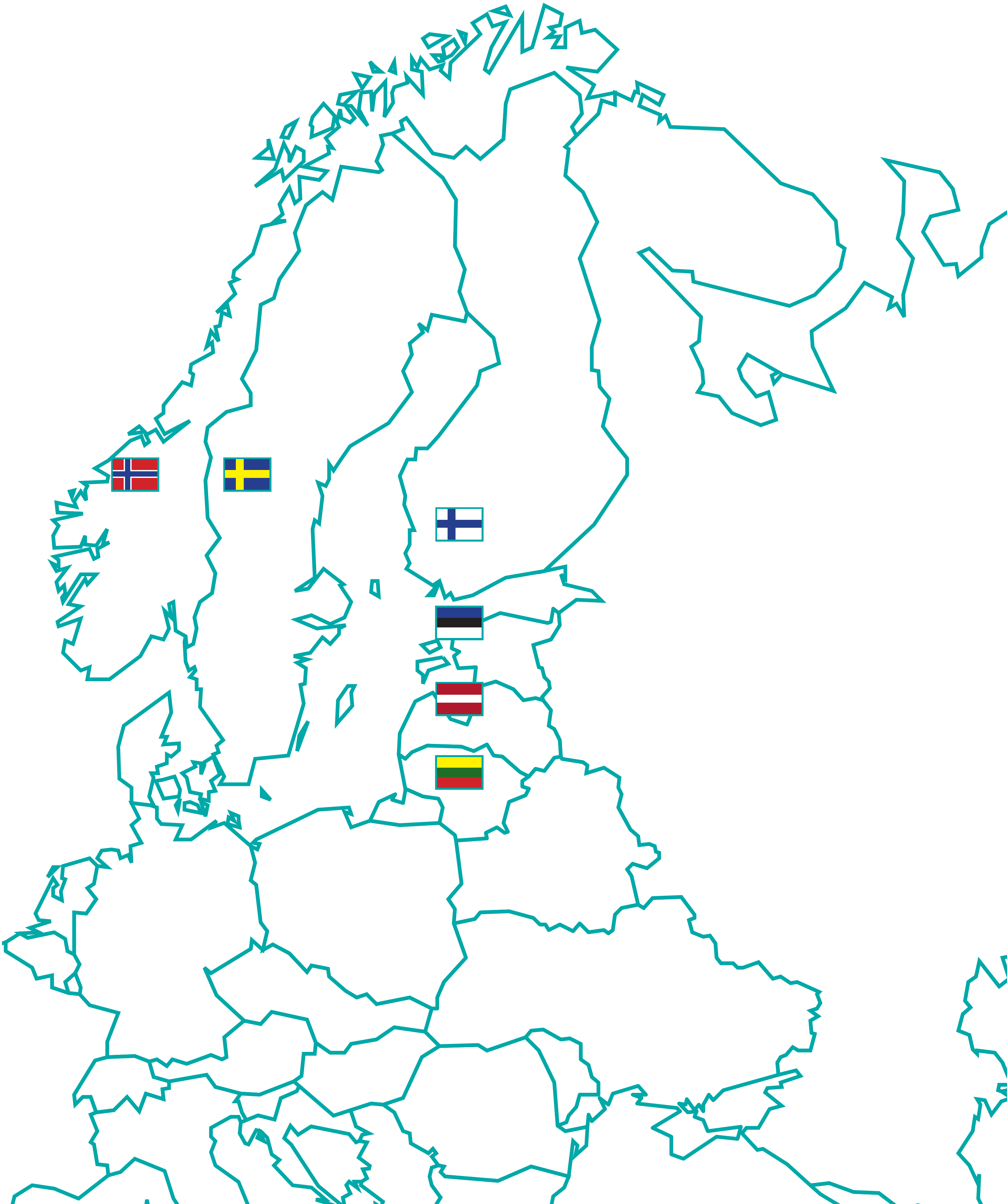
NORTHEN EUROPE MEDICAL HUB

GATE TO THE HIGH QUALITY MEDICAL SERVICES



ABOUT US

EXPORTERA

international trading professionals

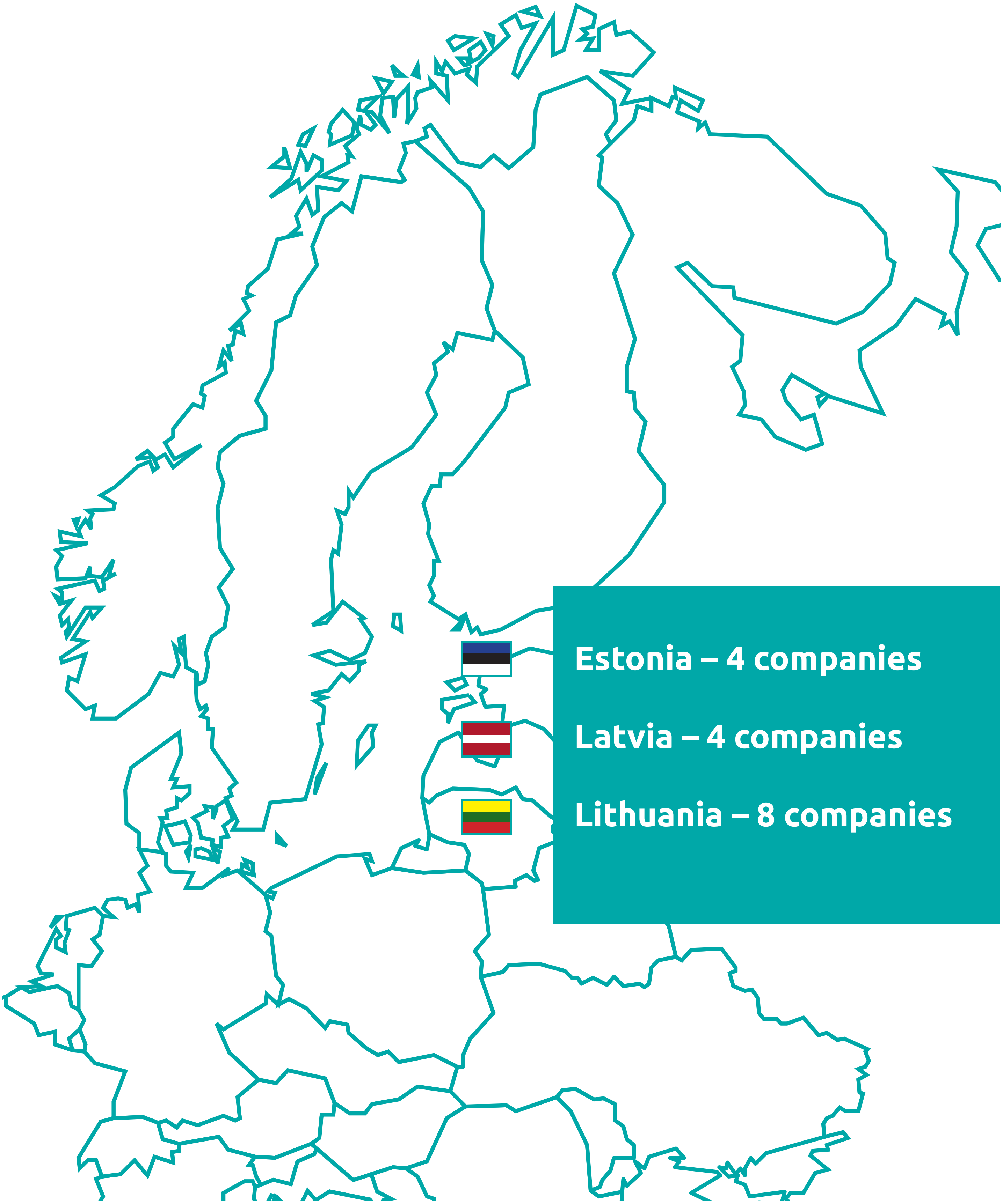
Optifarma

dėmesys sveikatai

We facilitate the network of medical patients brokers (independent companies and hospitals in-house patient brokers).

THE AIM OF THE NETWORK

Supplying the patients from the target markets in Western and Eastern to the private hospitals and SPAs in the Baltic States.



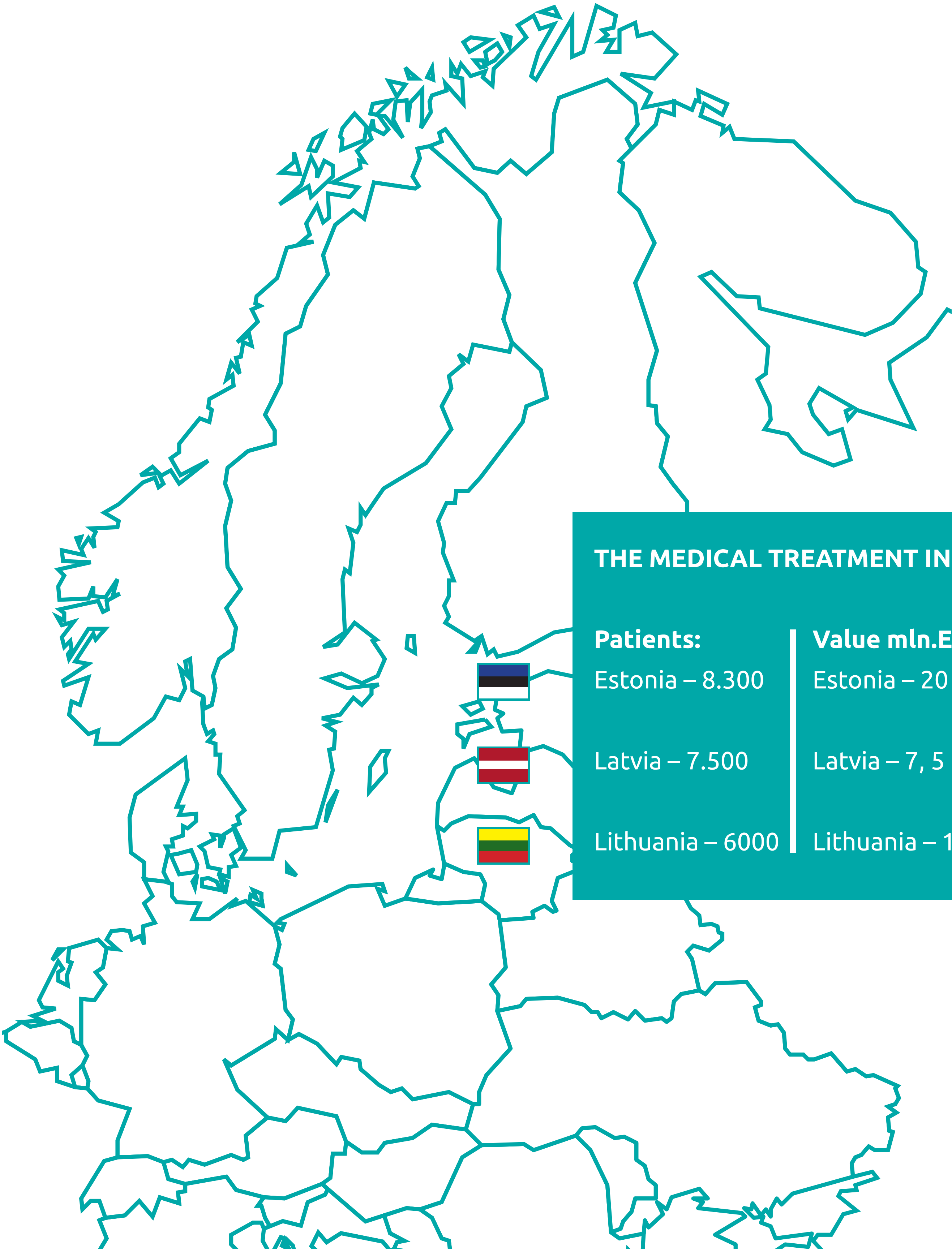
WHO ARE OUR CUSTOMERS?

(Hospitals and SPAs in the Baltic countries)

HOSPITALS	SPAs
Estonia – 3	Estonia – 12
Latvia – 7	Latvia – 9
Lithuania – 12	Lithuania – 15

FROM WHICH MARKETS DO WE ATTRACT THE MEDICAL TOURISTS TO THE BALTIC STATES? (1)

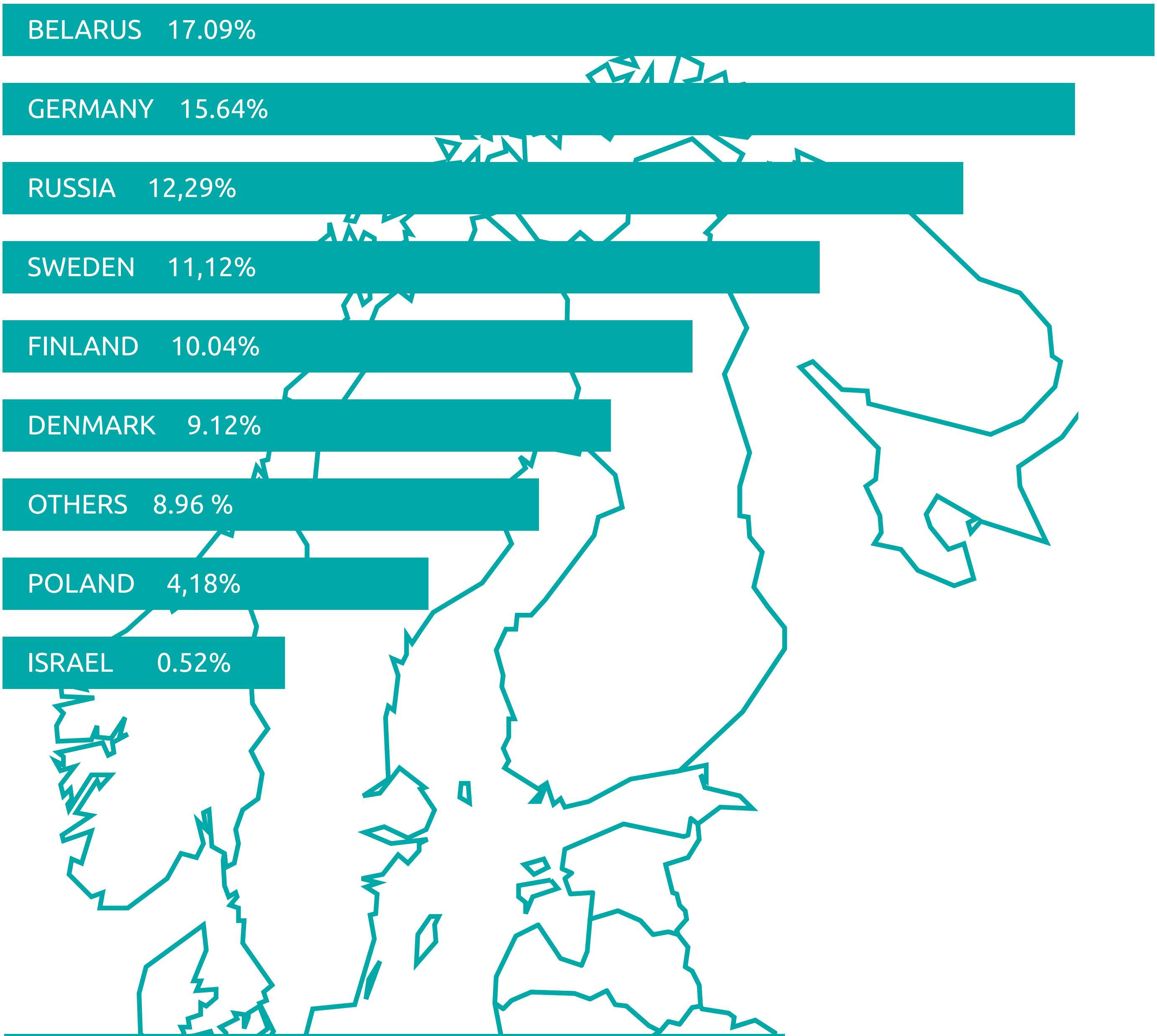
The number of patients is increasing in 30% per year
The medical tourists make 3-7% of all patients



THE MEDICAL TREATMENT IN 2011

Patients:	Value mln.EUR:
Estonia – 8.300	Estonia – 20
Latvia – 7.500	Latvia – 7, 5
Lithuania – 6000	Lithuania – 10,6

FROM WHICH MARKETS MEDICAL TOURISTS ARE ATTRACTED BY OUR NETWORK TO THE BALTIC STATES(2)



SPAs TREATMENT:

Patients:
Lithuania – 28.015,
Latvia- 19.500,
Estonia – 31.000

Value:
Lithuania -10,6 mln.EUR,
Latvia – 7, 5 mln EUR,
Estonia – 20 mln. EUR

The number of visitors is increasing in 18% per year
The foreigners make 30% of all visitors

WHICH SERVICES ARE MARKETED TOWARDS MEDICAL TOURIST COMING TO THE BALTIC STATES FROM DIFFERENT MARKETS?

1 **THE SERVICES MARKETED TOWARDS THE EASTERN MARKETS:**

- Cardiology
- Plastic surgery

2 **THE SERVICES MARKETED TOWARDS THE WESTERN MARKETS:**

- Medical examination
- Non-invasive diagnostics

3 **THE SERVICES MARKETED TOWARDS THE WESTERN MARKETS:**

- Medical examination
- Non-invasive diagnostics
- Odontology

COMPARISON WITH THE SERVICES DELIVERED BY GERMANY AND SWITZERLAND TOWARDS MEDICAL TOURISTS

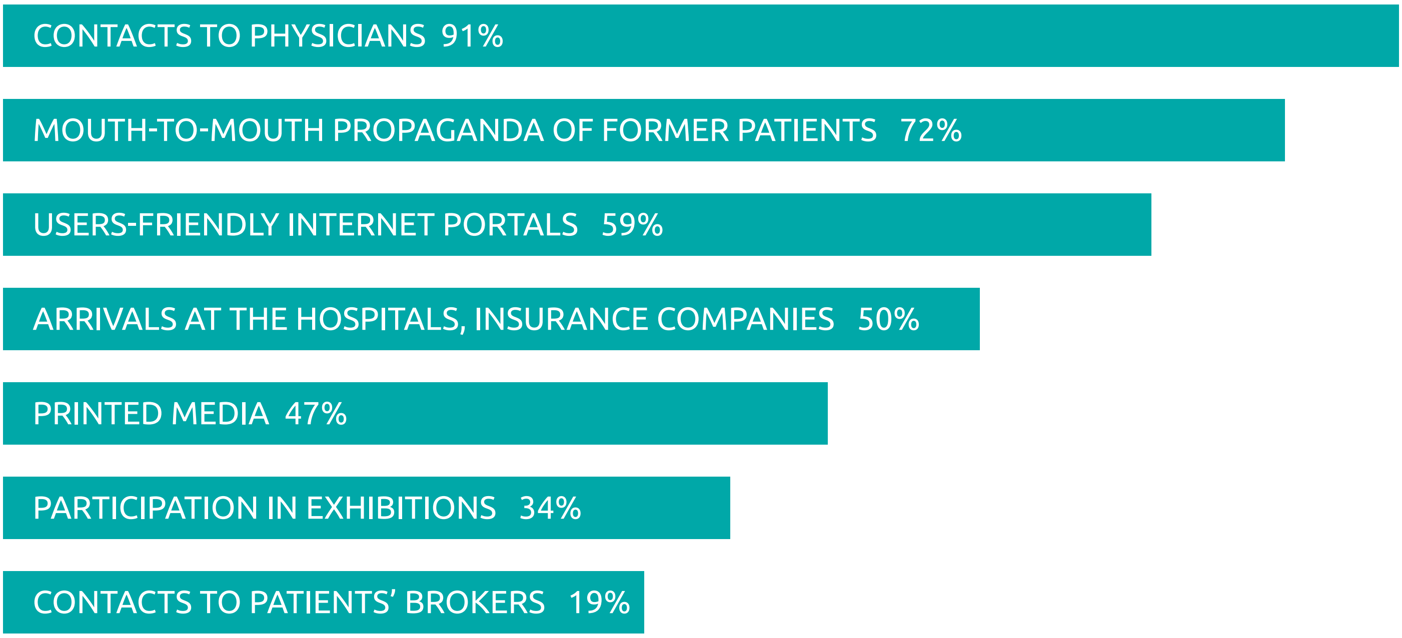
GERMANY

- ORTHOPEDIC 63%
- CARDIOLOGY 44%
- NEUROSURGERY 26%
- ONCOLOGY 22%
- NEUROLOGY 19%

SWITZERLAND

- ORTHOPEDIC 86%
- YOUTH MEDICINE 29%
- GYNAECOLOGY 29%
- ONCOLOGY 29%
- UROLOGY 29%

VALUE OF COMMUNICATION CHANNELS IN REACHING THE MEDICAL TOURISTS IN OUR TARGET MARKETS



OUR SERVICES ARE BASED ON PATIENTS DECISION CHAIN

Identification of needs

Identification of needs
For medical treatment

- Price?
- Waiting time?
- Quality of the medical services?
- Confidentiality?

Search on information

- Family and friends
- Financing of insurance
- Information about country
- Qualification of physicians
- Reputation of hospitals
- Accreditation
- Travel agencies

Evaluation and decision

- Personal factors
- Openness to new experience
- Travel experience
- Linguistic and cultural factors
- Incomes and demographical features

- Travel / treatment experience and evaluation of experience

THE PROCESS OF RENDERING OF OUR SERVICES

Determination of a contact between a medical tourist and our services

- Counseling on the rendered medical services (e-mail, call-centre, video conference)
- Planning of the medical treatment and the trip

Medical tourist's arrival to the airport

- Escorting
- Organization of transportation

Hospitalization

- Organization of accommodation facilities of the medical tourists' family members
- Translation services

Medical treatment

- Diagnostic
- Medical treatment
- Rehabilitation
- Purchase of medicine
- Entertainment
- Telecommunication services
- SPA services and excursions for the relatives of the medical tourists

- Tourism agencies
- Excursions

Medical tourist's returning home

- The evaluation of future needs of patient

Further patients' consultations in his/her homeland (if necessary)

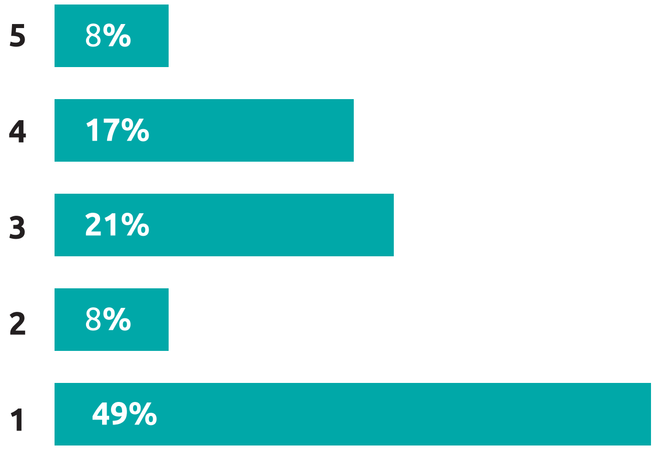
DOES NORWAY HAVE THE CHANCE TO BECOME A MEDICAL TOURISM DESTINATION (BASED ON EVIDENCE OF GERMANY AND SWITZERLAND MEDICAL TOURISM EXPERIENCE)? WHAT TO DO?(1)

Medical tourists – Germany vs. Switzerland

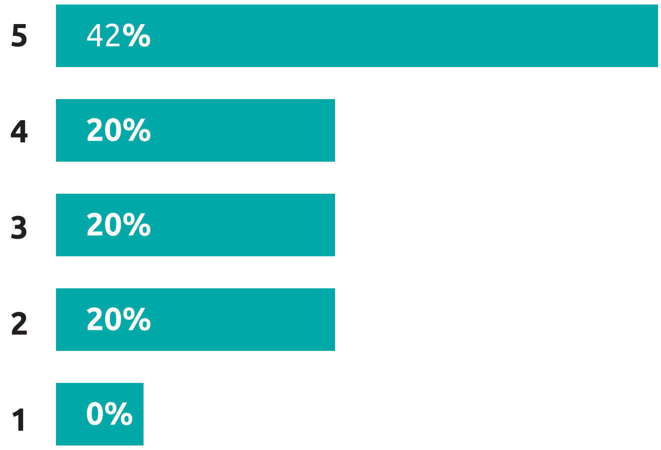
DEMOGRAPHIC DATA	GERMANY	SWITZERLAND
OECD Comparison (2011)	The 3th –expensive Healthcare system between OECD countries – 10.9% GDP	The 2th –expensive Healthcare system between OECD countries – 11.2% GDP
Hospitals total (included Reha)	3.628	356 (75% hospitals with 135 places)
Number of places in hospitals in general	559.651	50.112
Number of physicians (includ ed dentist)	112.899	17.876
Active physicians je 1000 inhabitants	3.3	3.5
Patient number general (served on hospitals)	16.487.100	1.326.969
Medical tourist	50.000 (19.000 planed treatment; 31.000 treatment after accidents)	19.500 (13.065 planed treatment; 6.435 treatment after accident)
Share of medical tourist in the amount of all patients served by the healthcare system	~0.3%	~1.4%
Expenditure to the national healthcare system	214.9 mlrd. EUR	43.4 mlrd. CHF
Income from medical tourist	850 mln. eUR	0.7 mlrd. CHF
Share of the incomes from the medical tourism in the budget of national healthcare	~0.25%	~1.6%
Medial tourists brokers number	20	2

NUMBER OF FOREIGN MEDICAL TOURISTS COMING TO GERMANY/SWITZERLAND

GERMANY



SWITZERLAND

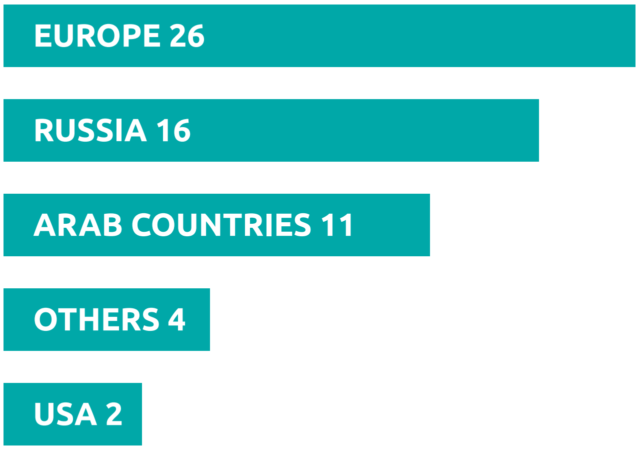


5 = more as 500 patients; 4 = 251 till 500 patients; 3 = 101 till 250 patients; 2 = 50 till 100 patients; 1 = less as 50 patients

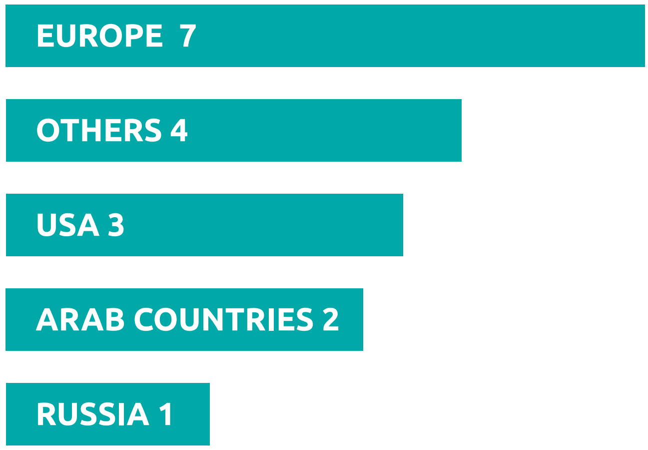
In Germany near 50% of hospitals receive less as 50 medical tourists; in Switzerland 42% of hospitals receives more as 500 medical tourists

WHAT COUNTRIES DO THE MEDICAL TOURISTS COME TO GERMAN AND SWITZERLAND FROM?

GERMANY (26 HOSPITALS INTERVIEWED)



SWITZERLAND (7 HOSPITALS INTERVIEWED)



The majority of tourist comes from Europe. The second place takes the Russia. During the last year every fourth hospitals in Germany has served patients from Arab countries.

HOW THE MEDICAL PATIENTS ARE CLASSIFIED ACCORDING TO THE PAYMENT CAPABILITY?

GERMANY (32 HOSPITALS INTERVIEWED)

- From own pocket 30
- Foreign healthcare funds 14
- Foreign Embassies/Gov. 14
- Others 4
- Companies 2

SWITZERLAND (7 HOSPITALS INTERVIEWED)

- From own pocket 7
- Foreign healthcare 6
- Others 3
- Embassies/Gov 0
- Companies 0

The majority of medical tourists are paying for the medical treatments from their own pocket.

WHY DID GERMANY AND SWITZERLAND SUCCEED IN MEDICAL TOURISM?

1. Creation of medical tourism clusters (public financing in Germany – 1.94 mln. eur)
2. Ensuring and enhancing the quality of medical and medical spa services (private investment of the cluster members)
3. Implementation of changes on the legal base
4. Development of physical infrastructure and competence (public financing in Germany – 40 mln. eur)
5. Implementation of marketing measures (public financing in Germany -10 mln. eur)
6. Development of sales channels and promotion of cooperation (public financing in Germany -12.5 mln. eur)

WHY DID GERMANY AND SWITZERLAND SUCCEED IN MEDICAL TOURISM?(1)

1. Clustering of medical services resources (public funding in Germany - 40 mln.eur)

The German (Swiss) medical tourism cluster is being created in order to unite and use completely the available resources, to implement the common marketing principles, to ensure and enhance the quality of the provided services and to promote the cooperation. The clusters consist of the operators implementing the coordination of the cluster activities, the providers of medical and medical spa services, other companies (hotels, agencies) operating in the medical tourism value chain, and the associated organizations.

2. Definition of the product and improvement of its quality.

It is necessary to develop the institution (cluster structure) combining the available medical and related services' providers oriented towards the export. It will reduce the potential risks for the reputation and image of German (Swiss) medical tourism sector abroad. The package of medical services focused on the export and the quality of services are defined in details, the needs and possibilities of quality enhancement are specified. Accreditation and certification of the selected service providers is performed.

3.Improvement of the image and awareness-raising of Germany (Switzerland) as the country promoting medical tourism, sales of the medical services abroad.

The implementation of marketing and communication measures oriented towards the increase of accessibility of information concerning the possibilities of medical tourism in Germany (Switzerland), the overall awareness of Germany (Switzerland) and formation of its positive image. Active sales of services are planned and implemented on the tactical level. Sales channels are developed by making contacts with potential agents, sales representatives, private medical service providers, insurance providers, and foreign public institutions.

THE FOLLOWING VALUE PROPOSITIONS ARE BEING DEVELOPED BASING ON THE REASONS FOR THE SELECTION OF A COUNTRY AS A DESTINATION:

- Quality – professional qualifications of specialists, compliance with the highest international standards and international accreditations, quality of nursing care
- Price – a high value at a favourable price is communicated without highlighting the low price aspect only
- Convenience – the rapidness of the provision of services and the variety of the services provided as one package
- Cultural/ mentality proximity and linguistic aspect

In order to promote the attraction of German (Swiss) medical tourism, the establishment of medical tourism representative offices in the target markets is performed. This is done by choosing the most appropriate form of representative office according to the needs and context. The representative offices include the following types: an information representative office, a representative office providing consulting and travel organisation services, and/or a representative office providing medical consultations before and after the trip.

THE FOLLOWING TWO KEY MESSAGES OF THE MARKETING CAMPAIGN ARE USED:

- Germany (Switzerland) is a country with high-quality medical services and perfect recovery conditions. Moreover, these services are available at favourable prices (quality, convenience, high value at a favourable price);

- Germany (Switzerland) is a country with high-quality medical services and perfect recovery and communication facilities. Moreover, these services are available at favourable prices (quality, convenience, language/culture, high value at a favourable price).

THE FOLLOWING THREE MEDICAL TOURISM MARKETING DIRECTIONS ARE DEVELOPED SIMULTANEOUSLY:

- Provision of information – enhancement of comprehensiveness and spread of information about Germany (Switzerland), medical service providers and services;

- Image formation – international public relations, general marketing guidelines, proactive promotion

- Presentation of services – promotion of services at the national level, networking, sales, and advertising

4. Improvement and development of physical infrastructure.

The existing infrastructure of medical services provision is adapted to the export needs and new infrastructure (a hospital oriented toward the export of services only) by implementing the investment projects in order to meet the needs of potentially increasing flows of medical tourist.

NORTHERN EUROPE MEDICAL HUB (NEMH):

- Is a professionally managed one window for medical tourists of target markets;

- Is a cultural and linguistic competence in target markets of medical tourism;

- Is a professional creation and maintenance of communication channels for searching new medical tourists;

- Is a thorough and focused accessibility of medical tourists;

- Is the reduced marketing costs while presenting one's services to the present and future clients;

- Is a more effective workload (employment) of the infrastructure of rendering services among NEMH participants;

- Is a professional and effective branding of a trademark in the target markets;
- Is a synergetics among NEMH participants providing the opportunity to save the administrational, technical, financial and human resources when achieving the specified goals.

NEMH BENEFITS ARE BEHIND JUST ONE CLICK OF YOUR MOUSE:

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