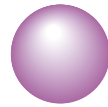


About HBS Consulting

HBS Consulting is an international consulting firm which aims to maximise return on investment on strategic initiatives and marketing expenditure – working in partnership with corporate strategy and marketing teams exclusively in the medical device, diagnostics and lifescience industries.

HBS Consulting provides client solutions through four industry operating groups, each offering eight service lines. These provide specialist insight and market knowledge to take advantage of today's opportunities.

Operating Groups Functional Expertise



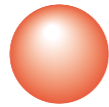
MedSurg

Medical Devices
Surgical Equipment
Patient Care



IMIS

Medical Imaging
Patient Monitoring
Information Systems



Diagnostics

Clinical
Laboratory
Point of Care



Life Sciences

Pharmaceuticals
Drug Discovery
Biotechnology



Services

- Market Entry Strategy
- Market and Product Positioning
- Product Development & Product Launch
- Corporate & Business Unit Strategy
- Investment Appraisal and Product Valuation
- Mergers and Acquisitions, Licensing, Due Diligence
- Leveraging Strategic Partnerships and Alliances
- Customer Relationships



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HBS-INFO

HBS Consulting's insight on business strategy
for the healthcare industry.

Issue September/October 2008



Dear Reader,

HBS Consulting has decided once more after our very successful HBSQ quarterly newsletter, to keep up with the pace of time. In future the old quarterly newsletter will be replaced by the two-monthly HBS-INFO keeping our valued clients and associates up to date with developments, chances as well as innovations of the healthcare market.

Containing only two articles, the HBS-INFO will provide for the opportunity of feedback and communication with the client as well as possibly the motivation of reading two short articles rather than glancing across a concise magazine.

In this edition we like to draw your attention to the new Surgical Workflow Analysis developed together with a partner of HBS Consulting as well as the state of Radiology Treatment in Europe and the US.

Best regards,

Andrew Stuart-Houghton
Director Marketing

SYSMEX

"During the last two years, HBS Consulting conducted several projects for us in the field of Life Science and Veterinary Diagnostics. Based on the collaboration with HBS Consulting we were enabled to identify business opportunities and to develop successful marketing strategies in our new business fields."

Matthias Kutzner
Director, Business Development, SYSMEX



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Radiology – Is Europe uptodate?

Radiotherapy for cancer in Europe can't offer the treatment in quantity, and quality which is required, although it could be the least traumatic non invasive treatment of the most common types of treatment, surgery and chemotherapy. The increasing number of cancer cases, which is driving this need, is a result of an ageing population, and also due to better diagnostics.

In virtually all countries, health care systems are under strong pressure to simultaneously improve efficiency, and contain costs. Improvements of treatment and IT systems are facilitating higher efficiency. This impacts patient turnover, as well as information management and administration.

US

In the U.S., half of the radiation therapy centres operate only one treatment system. But meanwhile, the primary growth drivers are; the rising cancer incidence, technology advancements, and competition among hospitals.

There is a rapid acceptance of new, and refined treatment methods like; IGRT, SRT and VMAT. This is reflected in growing capital budgets at radiation oncology departments, which increased by fourteen percent in two years, because of the necessity for efficient restructuring. Efficiency of patient turnover, and the processing of clinical data, is often decisive factors in the U.S. market.

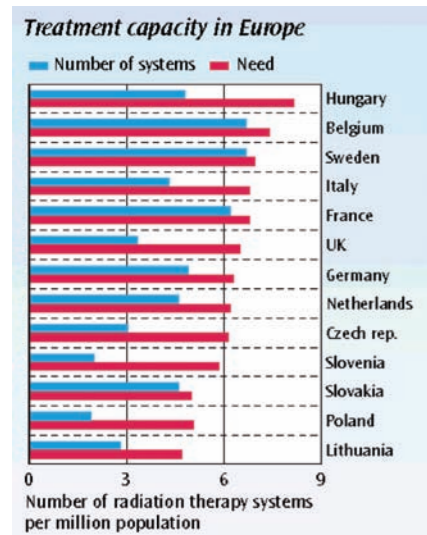
Europe

In Europe there is significant shortcoming for radiation therapy and radio surgery. Market development is largely driven by national and regional initiatives to remedy these shortcomings.

In Germany there is a growing need for patient treatment options through modern radiotherapy systems. Superficially it seems to be balanced between the needs, and the systems that are available. The fact is that 18 per cent of actual radiotherapy treatments deliver unsuccessful results. The ageing systems which are often still used do not comply with required standards. This has brought about national investment programs which are already in place, or under way, to improve the situation in Germany and several other EU countries.

Today, approximately half of all patients in developed countries, who are diagnosed with cancer, are treated with radiation therapy, often in combination with other treatment, at some stage of their illness. More advanced, precise, and accurate methods are expected to increase the role of radiation therapy more and more in the future. The rapid development of new technology is resulting in higher average values.

HBS-Consulting helps you to define and develop a market for your innovative Products. Our theoretical knowledge and the practical experience in research of the medical market help to set strategy and tactics. Funded patient access to Radiotherapy equipment and financial opportunities provide the opportunity to maximise your sales.



Source: Bentzén et al. Towards evidence-based guidelines for radiotherapy infrastructure and staffing needs in Europe: the ESTRO QUARTS project, RadioTher Oncol. 2005 June.

Surgical Workflow Analysis – New Type of Data Collection at HBS

Nowadays information systems support structuring and realisation of business processes substantially. Business process analysis and optimisation allow continuous adjustment of business processes according to market requirements. SWAN – Scientific Workflow Analysis GmbH Leipzig in cooperation with HBS Consulting has developed methods for the data collection and analysis of patient individual surgical procedures allowing a detailed analysis and evaluation of surgical processes. By Dr Oliver Burgert

Traditionally, intraoperative surgery and medicine in general do not lend themselves to analysis, and therefore do not allow for optimisation and support through information systems.

The main reasons for this lie in the highly variable nature of these business processes through the significant proportion of manual work steps, the variety of patient individual characteristics, as well as a lacking ability to communicate such processes due to missing data collection and description methodologies.

"Surgical Workflows" is a novel scientific methodology to describe surgical procedures. It serves as a base to gain information of surgical steps during an intervention.

The methods are universally applicable for all kinds of surgeries; including pre-, peri-, and post surgical areas, as well as Clinical Pathways.

Based on this innovative approach, a range of new technological research questions and application areas open up:

1. Surgical procedures can be gathered and analysed for each individual patient.
2. A number of patient individual surgical interventions form statistical models for average surgical procedures.
3. Surgical workflows can be analysed systematically in view of research requirements for new, or improved surgical instruments and assisting systems.
4. Even prior to the first step of developing new instruments or systems, propositions regarding their potential success can be made.
5. The impact of clinical usage of newly developed surgical instruments and assisting systems, and their effects on the surgical procedure as a business process become closely quantifiable.
6. Further implications of clinical usage, working conditions of the surgeon, as well as long term-follow-up of patients can be evaluated in detail.

