



ParkwayHealth™

Globalization of Health Care

- A ParkwayHealth's Perspective

Presentation by
Daniel James Snyder
Group Executive Vice President
& Chief Executive Officer

October 21, 2008

// We must ensure that the global market is embedded in broadly shared values and practices that reflect global social needs, and that all the world's people share the benefits of globalization. //

~ Kofi Annan ~

Our Strategy

Leading the way with excellence

MISSION

To make a difference in people's lives through excellent patient care

VISION

To be the global leader in value-based integrated healthcare

Brand Essence • Community • Innovation • Excellence • Confidence • Global Leadership

Values • People • Excellence • Results

People	Quality	Service	Finance	Growth
Attract, Develop, Retain Engaged Employees	Achieve the finest clinical outcomes	Attain the highest levels of service excellence	Meet and exceed our financial goals	Grow the system per our strategic plans
Create competitive compensation & benefit plans	Meet or exceed globally recognized clinical outcomes & benchmarks	"Journey to Excellence"	Exceed international benchmarks for operational efficiency	Singapore Ops
Develop competent staff	Build strong relationships with Doctors & Other Partners	Create patient-focused environments	Increase Bargaining power	International Ops
Enhance safety culture	Build a reputation for clinical excellence	Continuous process improvement	Optimise use of facilities	Grow the REIT
Enhance leadership development & succession plan	Create climate of open communication		Minimise Financial Risks	Develop good networks in target market
Build "Parkway Pride" & employee engagement programs			Improve profitability through bundling	
			Improve marketability of programs	

Our Vision

To be the global leader in value-based
integrated healthcare

Our Mission

To make a difference in people's lives
through excellent patient care

About ParkwayHealth

Our Values

People above all...

By treating those we serve and each other with compassion, dignity, integrity and mutual respect.

Excellence...

By striving for the finest clinical, service and operational outcomes.

Results...

By exceeding the expectations of the people we serve and those we set for ourselves.

Our Strategic Priorities

People: Attract, develop, retain engaged employees

Quality: Achieve the finest clinical outcomes

Service: Attain the highest levels of service excellence

Finance: Meet and exceed our financial goals and targets

Growth: Grow the system per our strategic plans

Our Progressive Global Reach



- New branding launched on 1 Sep 07.
- The new brand identity imbues the value and essence of the ParkwayHealth's brand, so as to visually represent ParkwayHealth as a global leader in value-based integrated healthcare.
- Launch of ParkwayHealth's International Brand Campaign in Nov 07.
- ParkwayHealth's advertisements are now recognisable in the Group's emerging markets such as the US, UK, Russia and the Ukraine, in Southeast Asia, aboard major inflight magazines and the Singapore media.

Corporate Background

- Listed in the Singapore Stock Exchange (SGX, 1974);
- Market Capitalization is near SGD 3 billion;
- Approximately 9,000 employees;
- Total revenues of SGD 870 million (FY2007);
- Launch of SGD 800 million Real Estate Investment Trust (REIT) 7 August 2007.

Our People

Establishing an organization structure built to execute

Our Senior Leaders



Richard Seow Yung Liang
Chairman



Dr. Lim Cheok Peng
Group President & CEO



Justine
Wingrove
CEO REIT



Choo Oi Yee
Group Senior
VP
STRATEGY



Ann Yong
Group Senior
VP, PR



Dan Snyder
Group EVP & CEO



Molly Foo
Group Senior VP
FINANCE



June Tay
GSVP
Legal and Risk



Prof Low
Teck Seng
CEO
Parkway
Education



Fong Choon
Khin
Group SVP
Information

Leadership Behaviour Expectations

Focus on people, excellence and results demonstrated by:

- Enthusiasm, energy and excitement
- “Can-do” attitude
- Mature and principled leadership
- Confidence
- Systems thinking and care about the whole
- Continuous learning and innovation and Global Mindset
- Teamwork

Healthcare Executive Leadership

**“ Inspiring and motivating
people to achieve the
vision and mission... ”**

Our Unique Selling Propositions

Maintaining excellent clinical initiatives aligned
with global industry practices

Our Unique Selling Propositions (USP)

Our Clinical Outcomes

CLINICAL INDICATOR	TARGET	CLINICAL OUTCOME
CABG		
CABG Mortality Rate	3.00%	2.10%
MIS Laparoscopic Surgery (Cystectomy, Myomectomy, Hysterectomy)		
Unexpected Return to OR	Less than 1.00%	0.00%
Conversion Rate to Open Surgery	Less than 1.00%	0.98%
MIS Laparoscopic Cholecystectomy		
Conversion Rate to Open Surgery	Less than 1.00%	0.60%
In Vitro Fertilization (Mount Elizabeth)		
Live Baby Birth Rate	35.00%	40.00%
Clinical Pregnancy Rate	41.80%	48.00%
Stroke Care		
Avg. Time to have CT Scan following admission	120 min	57.2 min
Barthel Indices for Stroke Patients	41.2 (Barthel Score On Arrival)	54.7 (Barthel Score At Discharge)
Total Knee Replacement		
No. of Patients that are able to Ambulate 4 th Post Operative Day	More than 90%	93.80%
Total Hip Replacement		
Surgical Site Infection Rate	Less than 1.00%	0.00%
Acute Lymphoblastic Leukaemia (ALL)		
Initial Response to Remission Induction Therapy	More than 95%	100%

Source: Reflections (A ParkwayHealth Quality Division Publication)

Our Unique Selling Propositions (USP)

Our Processes

- Benchmarking Against The Best (Process):
In ParkwayHealth, as a leading healthcare organisation, quality of care is of utmost importance. Our hospitals and medical centres are benchmarked against world-class facilities globally to improve our systems for safer practices and better outcomes in patient care.
- In 2006, ParkwayHealth's hospitals became Singapore's first private healthcare provider to attain the prestigious Joint Commission International (JCI) accreditation.
- Technology also has the potential to transform and bring healthcare to the next level. ParkwayHealth has invested heavily in state-of-the-art medical equipment such as the Da Vinci Robotic Surgical System and the Aquilion One 320-Slice CT Scanner.

Our Unique Selling Propositions (USP)

Competitive Pricing vs Peace of Mind

- While procedure prices in Singapore are about 20-40% higher than some of our neighbouring countries, it is also 50-100% cheaper than the UK and US
- ParkwayHealth's physician outcomes are as good as or even better than international standards
- Patients receive value-based, ethical, quality and safe care in our hospitals



Our Unique Selling Propositions (USP)

Medical Travel

- Patients travel for complex medical treatment and surgery, not just to save on cost, but to get these procedures done earlier, and sometimes, to access the best specialists available in the field.
- In 2007, ParkwayHealth received the Singapore Tourism Special Recognition Award for the Group's work in helping to create Singapore as a global medical hub.
- Foreign patients continue to be a vital segment of the Group's business mix and a strategic growth area.



Our Patients Mix

Foreign Patients - 30% (N= 240,000)

Local Patients - 70% (N= 560,000)

ParkwayHealth market share is 60% (estimated) of total medical travellers to Singapore in 2007

Foreign Patients Source :

Afghanistan	Brit. Virgin Is.	East Timor	Iraq	Mongolia	Saudi Arabia
Algeria	Brunei	Egypt	Ireland	Myanmar	South Korea
Australia	Bulgaria	Ethiopia	Japan	New Zealand	Spain
Austria	Cambodia	Finland	Kazakhstan	North Korea	Sri Lanka
Azerbaijan	Canada	France	Kenya	Nigeria	UAE
Bangladesh	China	Germany	Kuwait	Oman	Ukraine
Belgium	Coconut Islands	Guinea	Laos	Pakistan	United Kingdom
Bermuda	Columbia	Hong Kong	Libya	Philippines	USA
Bahrain	Croatia	India	Malaysia	Portugal	Uzbekistan
Bhutan	Cyprus	Indonesia	Maldives	Qatar	Vietnam
Brazil	Denmark	Iran	Mauritania	Russian Fed.	Zimbabwe

Our Services

Adopting a holistic approach to provide integrated facilities and expertise globally



Some of the nicest bunch of people we hope you never meet.

No one chooses to get sick. But if you should ever require medical care, you can be safe in the knowledge that you are in good hands at ParkwayHealth.

We are Asia's leading private health-care provider with three of Singapore's premier hospitals including East Shore, Gleneagles and Mount Elizabeth. Our 4,300 strong specialist team in Singapore work seamlessly together to provide comprehensive medical care based on each patient's different needs.

From as near as Indonesia, to as far as Africa, America and Russia, patients come for our specialists' care, but many also come for our advances in preventive medicine and Executive Health Screenings. Now nearly half of all foreign patients who come to Singapore for medical care come to ParkwayHealth.

Our International Patient Care Centres around the world provide medical referral and assistance in over 18 languages. Our global culture means we know and understand our patients from their perspective.

When it comes to healthcare, like you, we are never willing to compromise.

THAT'S THE PARKWAY.



Our Clinical Programs

- Clinical programs bring together facilities and expertise for the comprehensive treatment of specific illnesses / conditions in the program
- Treatment and care that is grounded on good clinical practice
- with excellent clinical outcome indicators → patients benefit
- Treatment and care is delivered in a seamless manner
- Performance measures and benchmarks
- Professional performance reviews

Our 8 Clinical Programs



Primary Care & Chronic
Disease Management



Neuroscience



Heart and Vascular



Oncology



Musculoskeletal



Women and Children



Transplant and
Cellular Therapy



Surgery

Parkway Liver Centre

Services Include:

- Living Donor Liver Transplantation
- Liver Surgery
- Liver Dialysis
- Pancreatic Surgery
- Gall Bladder/Bile Duct Surgery
- Paediatric Liver Surgery & Transplantation
- Radio Frequency Ablation (RFA)
- Transarterial Chemo Embolisation
- Liver intensive care



Haematology & Stem Cell Transplant Centre

Services Include:

- Haematology Consultation services
- Haemotopoietic stem Cell Transplant Program
- Outpatient Chemotherapy
- Blood Transfusion Services
- Biological and Cellular Therapy
- Apheresis Program
- Supportive Care program





When only the best artillery will do.

To achieve the finest clinical outcomes for our patients, ParkwayHealth has invested heavily in the most proven and advanced medical technologies.

ParkwayHealth was the first medical provider in South East Asia to deploy the TomoTherapy® HI-ART® System, the most advanced integrated cancer treatment system in the world. It allows doctors to deliver highly accurate radiation doses with precision, and can capture movement-by-movement images of targeted tumour immediately before and after treatment.

In 2004, we opened the first-of-its-kind Haematology and Stem Cell Transplant Centre in the region and were also leaders in implementing the da Vinci Surgical System, enabling surgeons to operate traditional open surgery through tiny incisions. Our living donor liver transplant programme has surpassed its 100th living donor liver transplant and continues to attract patients from around the globe.

From as near as Indonesia, to as far as Africa, America and Russia, patients come for our specialists' care.

Now nearly half of all foreign patients who come to Singapore for medical care come to one of our hospitals.

ParkwayHealth comprises three of Singapore's premier private healthcare providers including East Shore, Gleneagles and Mount Elizabeth Hospitals. Together, we offer patients medical treatment available in 22 facilities across six countries in Asia.

When it comes to healthcare, like you, we are never willing to compromise.

THAT'S THE PARKWAY.



Our Imaging Services

Aquilion ONE

- ParkwayHealth is the first to install the Aquilion ONE 320-slice CT Scanner in Asia, outside Japan.
- Able to image an entire organ in a single rotation, ensuring greater accuracy and diagnostic confidence.
- Physicians can see 3-D depictions of organs and how the organs' blood flow are dynamically functioning or moving within and around the organ.
- Can perform uniquely comprehensive exams that can reduce overall healthcare costs.



Aquilion One 320-Slice CT Scanner

Our Global Presence

ParkwayHealth's Hospitals, Medical Centres &
International Patient Assistance Centres

Joint Commission International (JCI)

All ParkwayHealth's three hospitals in Singapore are accredited by JCI.



Accredited in Year 2006



Accredited in Year 2006



Accredited in Year 2007



JCI is the international accreditation arm of the Joint Commission on Accreditation of Healthcare Organisations based in the United States.

The accreditation affirms that the processes and procedures we have put in place are of international quality standards. It represents a worldwide consensus on quality patient care and reflects state-of-the-art healthcare practices and healthcare delivery trends.

ParkwayHealth's Regional Hospitals

INDIA

No. of beds

- Apollo Gleneagles, Kolkata 225

MALAYSIA

No. of beds

- Gleneagles Medical Centre, Penang 150
- Gleneagles Intan Hospital, KL 303

8 Pantai Hospitals

- Pantai Medical Centre, KL 264
- Cheras Medical Centre, KL 200
- Pantai Klang Specialist, Klang 60
- Hospital Pantai Mutiara, Penang 250
- Hospital Pantai Ayer Keroh, Malacca 250
- Hospital Pantai Indah, KL 180
- Hospital Pantai Putri, Ipoh 121
- Hospital Pantai, Batu Pahat 50

BRUNEI

No. of beds

- Gleneagles JPMC (Cardiac Centre) 30

VIETNAM

- Parkway Shenton International Clinic

CHINA

No. of beds

- Gleneagles Intl Medical & Surgical Centre, Shanghai 4
- Luwan Inpatient and Specialty Centre, Shanghai 10

SINGAPORE

No. of beds

- Mount Elizabeth Hospital 505
- Gleneagles Hospital 380
- East Shore Hospital 123
- Day Surgery & Medical Centre 38
- ParkwayHealth's new hospital - 'Hospital of the Future' will be completed in 2011

Total Number of Hospitals: 15

Total Number of beds: 3,174

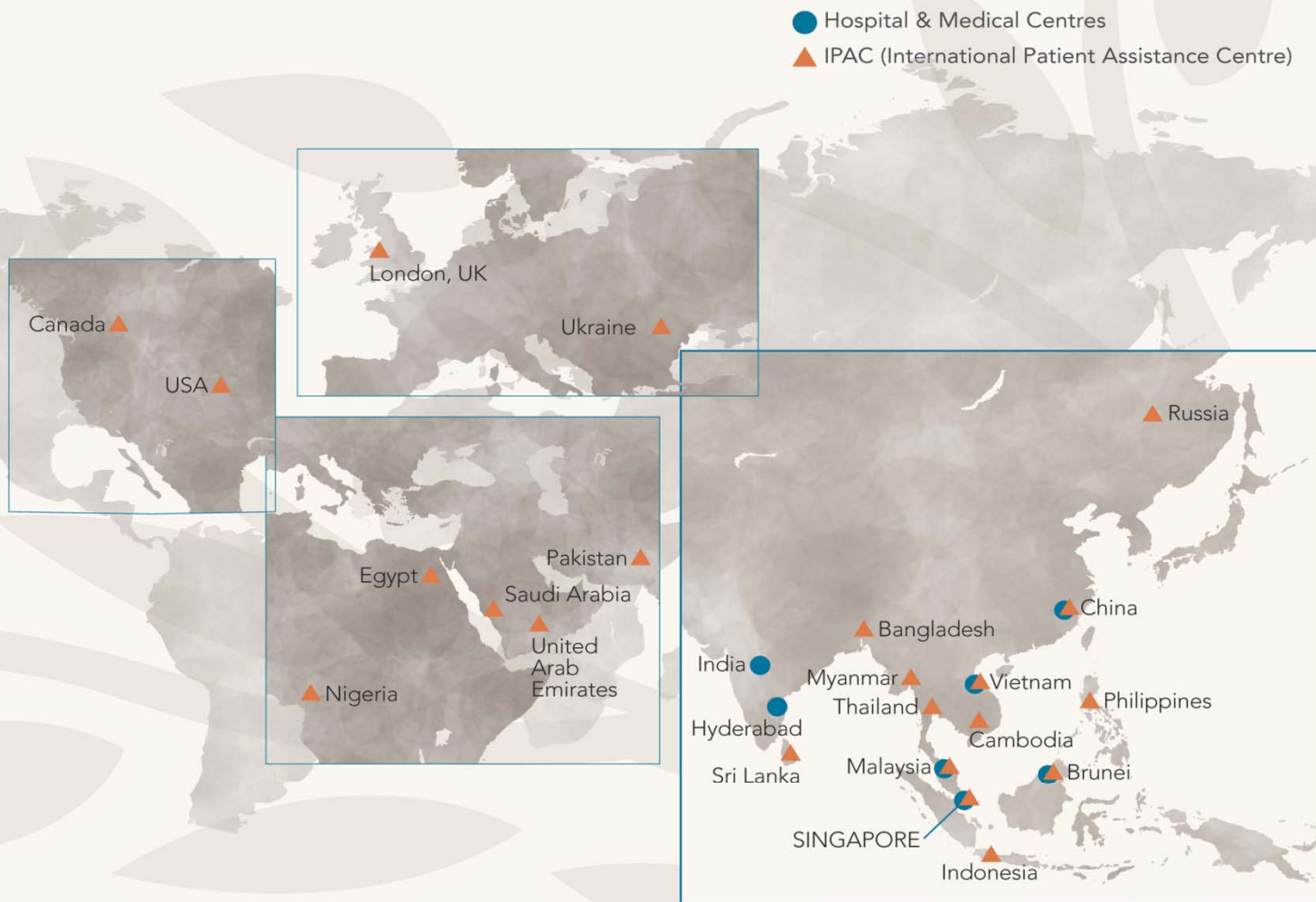
International Patient Assistance Centre (IPAC)

Services Include:

- Hotels Booking (Corporate Rates)
- Service Apartments Booking
- Airport Taxi and Meeting Services
- Limousine, Ambulance
- Daily Visit to Patients
- Interpreter, Food and Personal Needs
- Videoconferencing
- Banking Services Assistance
- One-stop service
- Emergency Care
- Non-Emergency Care
- Inquiry, Information, Feedback
- Specialist Appointment
- Evacuation & Repatriation
- Extending Visa/Flight
- Airport Transfer Arrangements

**24-Hour Helpline:
(65) 6735 5000**





N = 45

You can only manage what you measure...

In healthcare, you must measure everything...
You must link incentives to all measures...

Summary

- Clear on Strategy and Plans
- Organized to:
 - Continue from “Good to Great”
 - Build the Bench
 - Grow Rapidly
- Executing with Discipline, Standards and Professionalism

Thank You