



Global Health Connector Village @ HLTH23

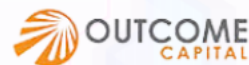


OCTOBER 8-11 2023 | LAS VEGAS USA

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USA

How Ageing Demographics are Changing the World



hlth.



Jon Warner
US Ambassador at ECHAlliance



The Global Health Connector

The Demographics of Aging

Jon Warner



HLTH. Las Vegas, 2023

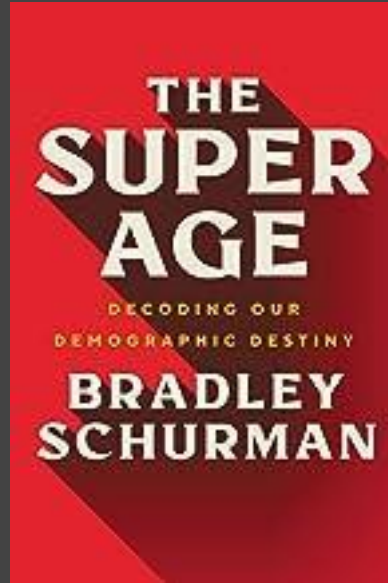
Demographic Drivers

- In 1881 German Chancellor Bismarck introduced a pension after retirement age of 70 -the average life expectancy at the time in Germany was **50**
- In 1901 'western' world average life expectancy in Europe as was **52**
- In 1921 (affected hugely by WW1) 'western' world average life expectancy was **54**
- In 1945 (affected hugely by WW2) 'western' world average life expectancy was **64**
- In 1981 (The year the PC was created) 'western' world average life expectancy was **74** (this 20 year 'jump' in just 60 years mainly coming hugely from much better sanitation, much lower infant mortality and the widespread deployment of antibiotics and immunization).
- In 2023 world life expectancy is **73** (**79** in the 'western' world) but children born at 2,000 or later are expected to live to **100**.

In 2030, almost 1 in 6 people in the world will be 65 or older or 1.4 Billion People (Double from 2020 or in just 1 Decade!)

Where are we in 2023

Lower birth rates Increased longevity



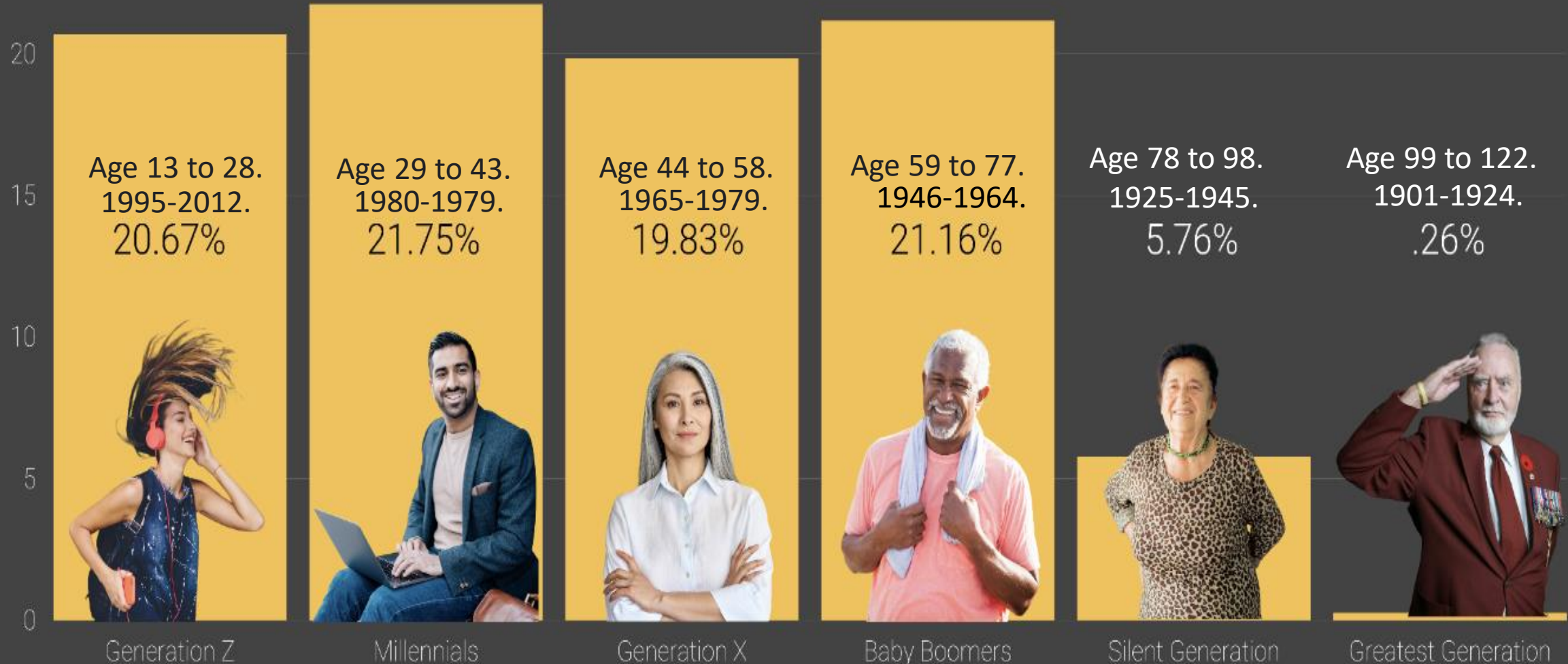
THE
SUPER
AGE®



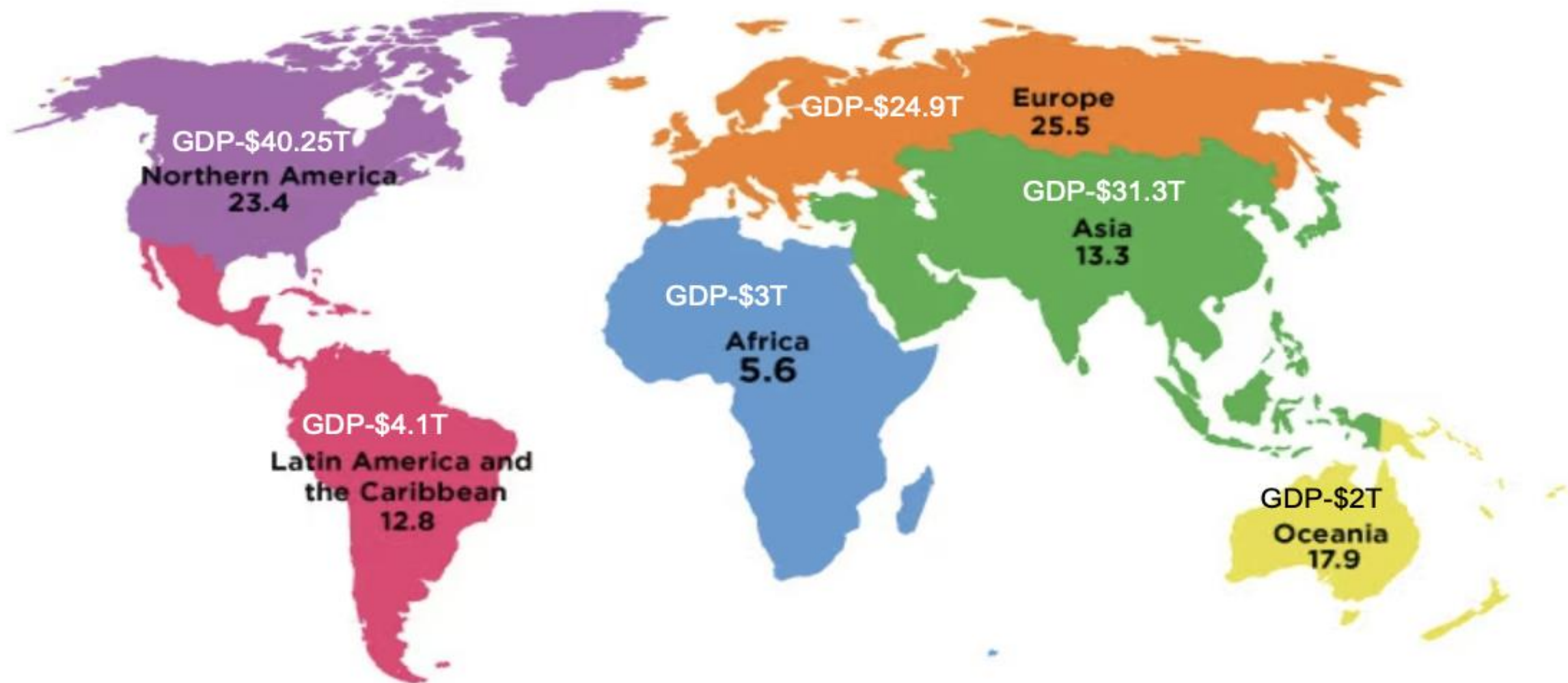
Growing parity amongst generations (U.S.)

25

BUT “STAGE” and NOT “AGE” PERHAPS A BETTER WAY TO THINK ABOUT THIS

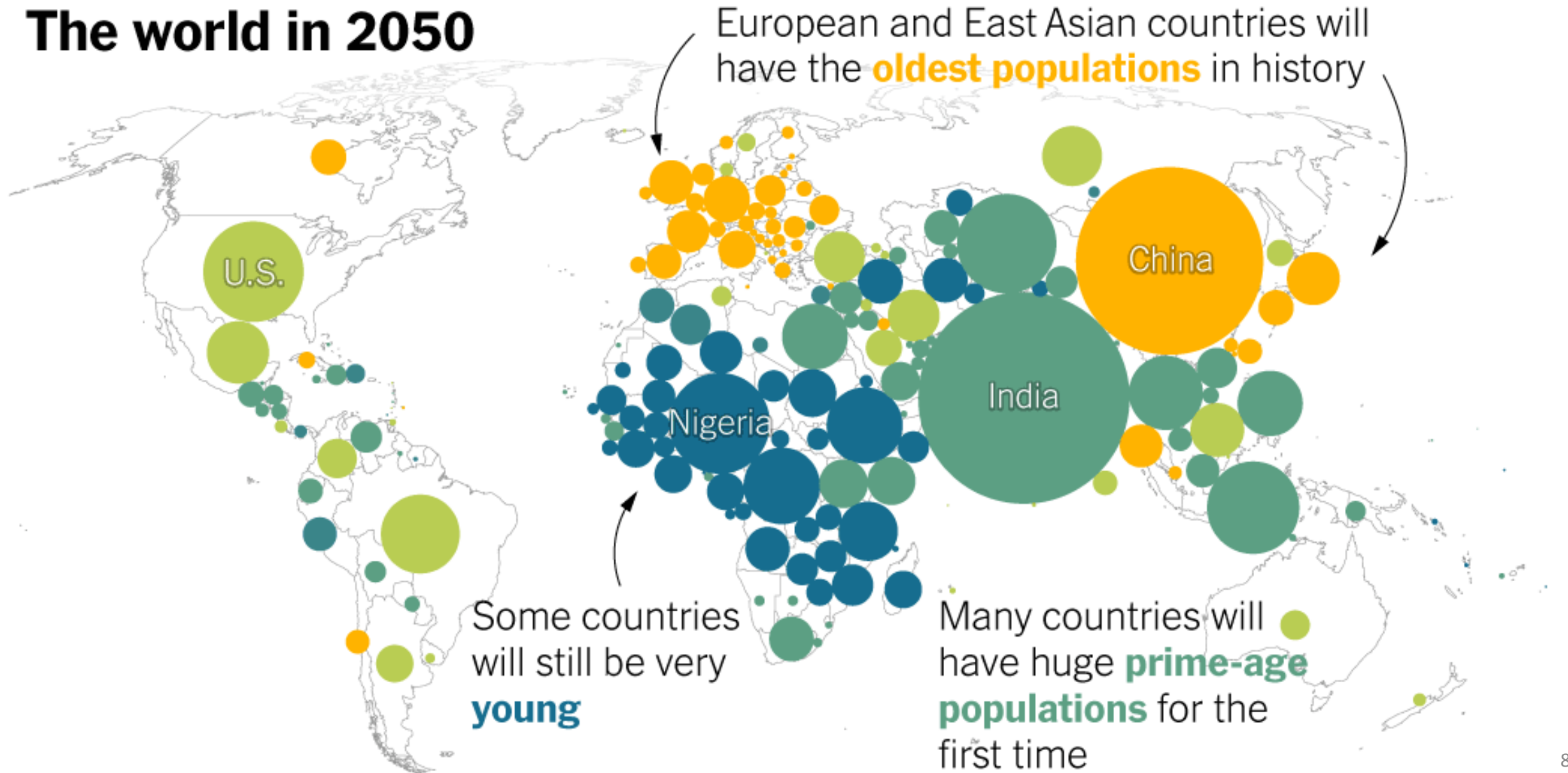


Percent of Population 60 and Older for World Regions: 2020 (+GDP numbers)



And the world's population will change dramatically on the next 25 years

The world in 2050



Countries/territories with the highest share of people aged 65 and older*

Europe Asia Carribean

2022

29.9% Japan

24.1% Italy

23.3% Finland

22.9% Puerto Rico

22.9% Portugal

22.8% Greece

22.4% Germany

22.4% Bulgaria

2050

Hong Kong 40.6%

South Korea 39.4%

Japan 37.5%

Italy 37.1%

Spain 36.6%

Taiwan 35.3%

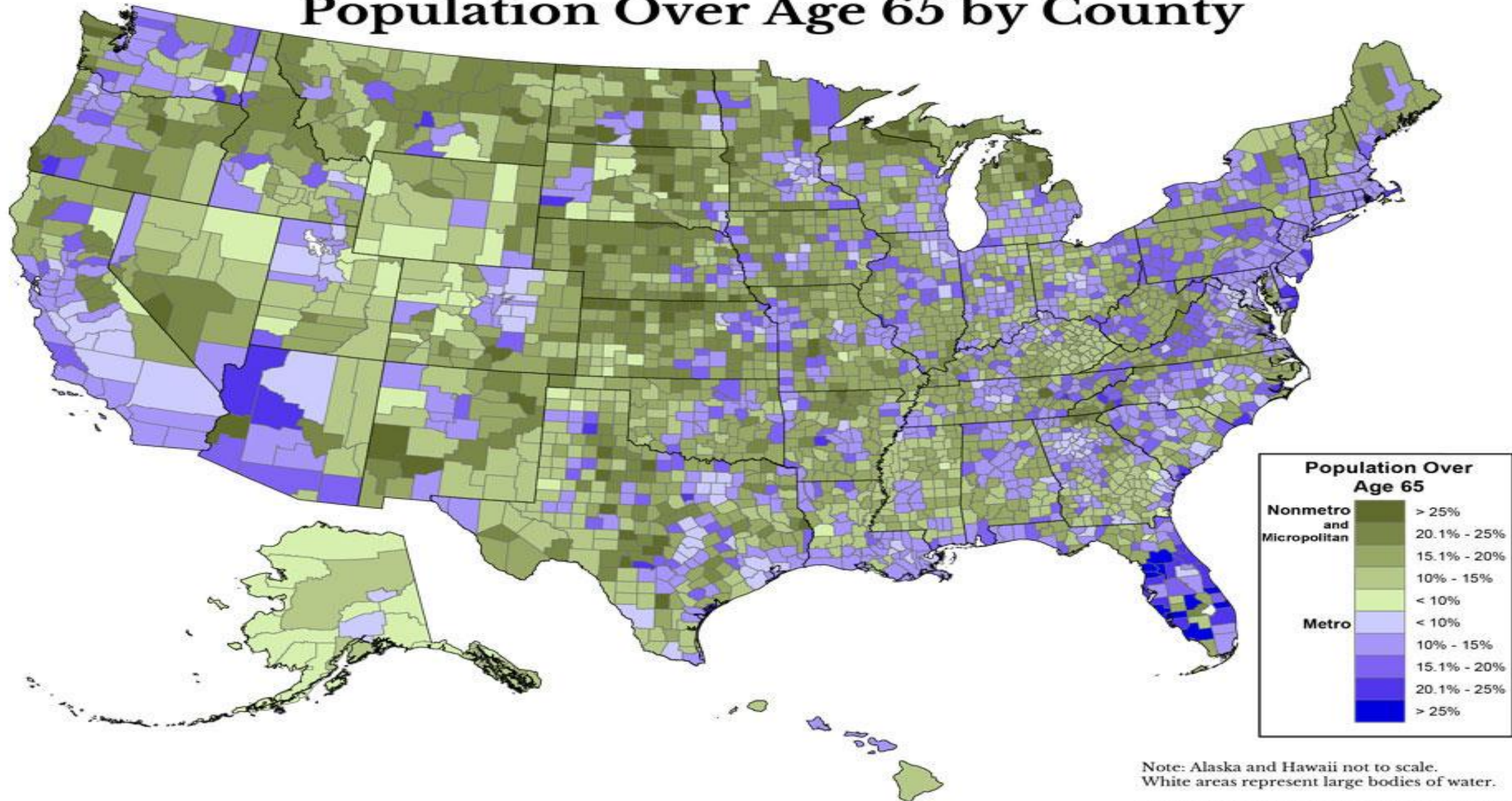
Greece 34.5%

Portugal 34.3%



As at 2022, the US has 16.3% of people at 65 or older. By 2050 it will be 22.3% (so look like Italy today)

Population Over Age 65 by County

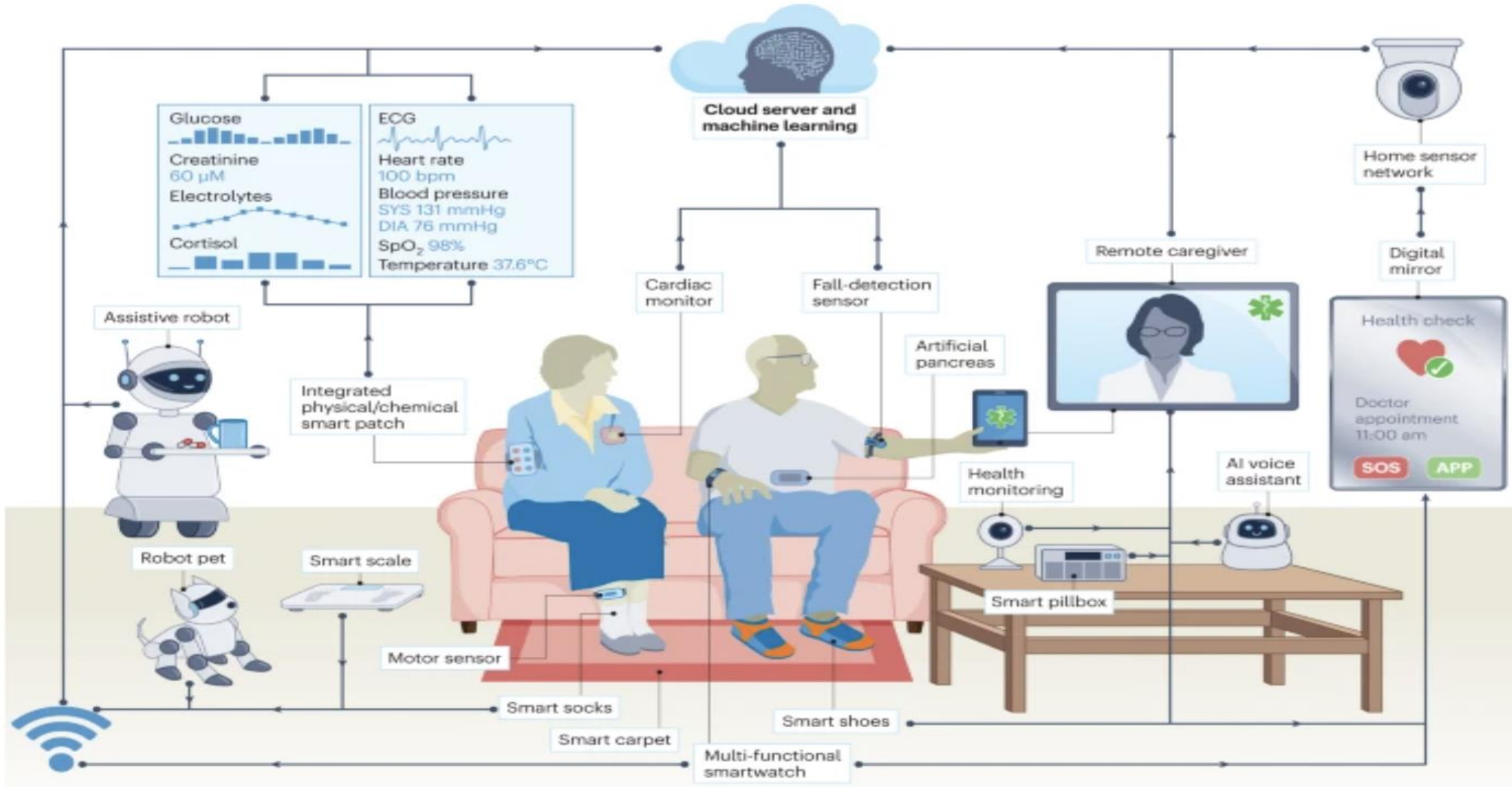


Source(s): U.S. Census Bureau, 2010 Decennial Census, Summary File 1

What Do older adults want today/tomorrow (generally)? (and therefore what do we need to strategize, plan and innovate around?)

Personal security/safety <ul style="list-style-type: none"> • House/Home safety and security • Fall vulnerability • Elder abuse/ageism • Fraud/Extortion • Cyberattack/ID theft • Financial security/ saving • Investment • Insurance 	Accessible assistance when needed <ul style="list-style-type: none"> • Home maintenance • Research/Insights • Relocation • Medications/Drugs • Forms/Paperwork • Tax/Social security • Finance/Legal • Pets (real and tech) 	Ready Mobility and Transportation <ul style="list-style-type: none"> • Walking • Using personal Car • Renting cars reading • Ridesharing • Bus/Train travel • Over water/seas travel • DME • Assistive mobility devices 	Appropriate Guidance on Innovation/technology <ul style="list-style-type: none"> • Technology awareness • Technology education • Ratings of quality and effectiveness • Discovering/using device functionality • Teleconferencing • Developing new solutions
Greater wellness <ul style="list-style-type: none"> • Exercise/Fitness • Sleep/Relaxation • Diet and Nutrition • Preventive medicine • Food as medicine • Genetics guidance • Self-optimization • Environmental health 	Good mental health <ul style="list-style-type: none"> • Mindfulness and Meditation • Emotional stability • Stress management • Relaxation options • Dealing with isolation and loneliness • Brain health/dealing with dementia 	Effective and accessible healthcare <ul style="list-style-type: none"> • Equity • Ready access to HCPs • Health insurance • Care support • Managing chronic conditions • Dealing with disease/ infections 	Self-actualization <ul style="list-style-type: none"> • Pastimes/Hobbies/clubs • New Relationships • Friendship and Love • Spirituality • Entertainment • Travel • Work/Volunteering • Learning

- Technology will assist us but we need to make it accessible, wanted and as frictionless to use as possible



- An aging population across most regions of the world, has many areas of impact, for older adults themselves, younger people and for communities and society, as the chart below lists:

Business and Entrepreneurship	Governance, Safety and Security	Population Health
Caregiving (and care-receiving))	Health, Healthcare and Drug Supply	Poverty and Hunger
Climate change	Housing/accommodation	Saving and Investment
Defense and War	Information systems and data	Scientific research
Discrimination, Equity and Access	Insurance (personal and public)	Social determinants of Health
Education/Training	Intergenerational relationships	Social security/pensions
End of life planning	Isolation and loneliness	Taxation/Tax planning
Energy/Sustainability	Land management	Technology and Innovation
Farming and Agriculture	Leisure and Entertainment	The Environment
Finance and Banking	Mental Health	Transportation
Food production	Migration	Travel/Tourism
General Government policy	Pay/Earnings	Work/Staffing (type and location)



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**Expanding our impact:
How developments in digital
measures and novel data
sources influence how we
'get ahead' of disease**



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Women in Health



Nicole Althaus
ECHalliance



Joanne O'Doherty
Kinsetsu



Nadia Adams
Blue Agilis



Jessa A.
Orion



Meg Samek-Smith
MultiPLAI



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BUSINESS FINLAND

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GLOBAL HEALTH
CONNECTOR
PARTNERSHIP
The global arm of ECHAAlliance Group

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FINLAND

Why Finland is so strong in healthcare innovation

Charlie Schick, PhD

Senior Advisor, Healthcare
Business Finland, Invest in Finland
charlie.schick@businessfinland.fi

Titta Houni

Senior Advisor, Healthcare
Business Finland
titta.houni@businessfinland.fi



#1

**HEALTH TECH IS
THE LARGEST AND ONE OF
THE FASTEST-GROWING EXPORT
SEGMENTS OF HIGH-TECH
FINNISH INDUSTRY**

Healthtech Finland 2019

#1

**DIGITIZATION AND ONE OF
THE BEST EU COUNTRIES IN
THIS DOMAIN**

Digital Economy and Society Index 2018,
Country Report Finland, European Commission

#1

**AVAILABILITY OF
SCIENTISTS AND ENGINEERS**

World Economic Forum Global
Competitiveness Report 2017–18

100%

**OF PATIENT RECORDS IN
ELECTRONIC FORMAT**

kanta.fi

#1

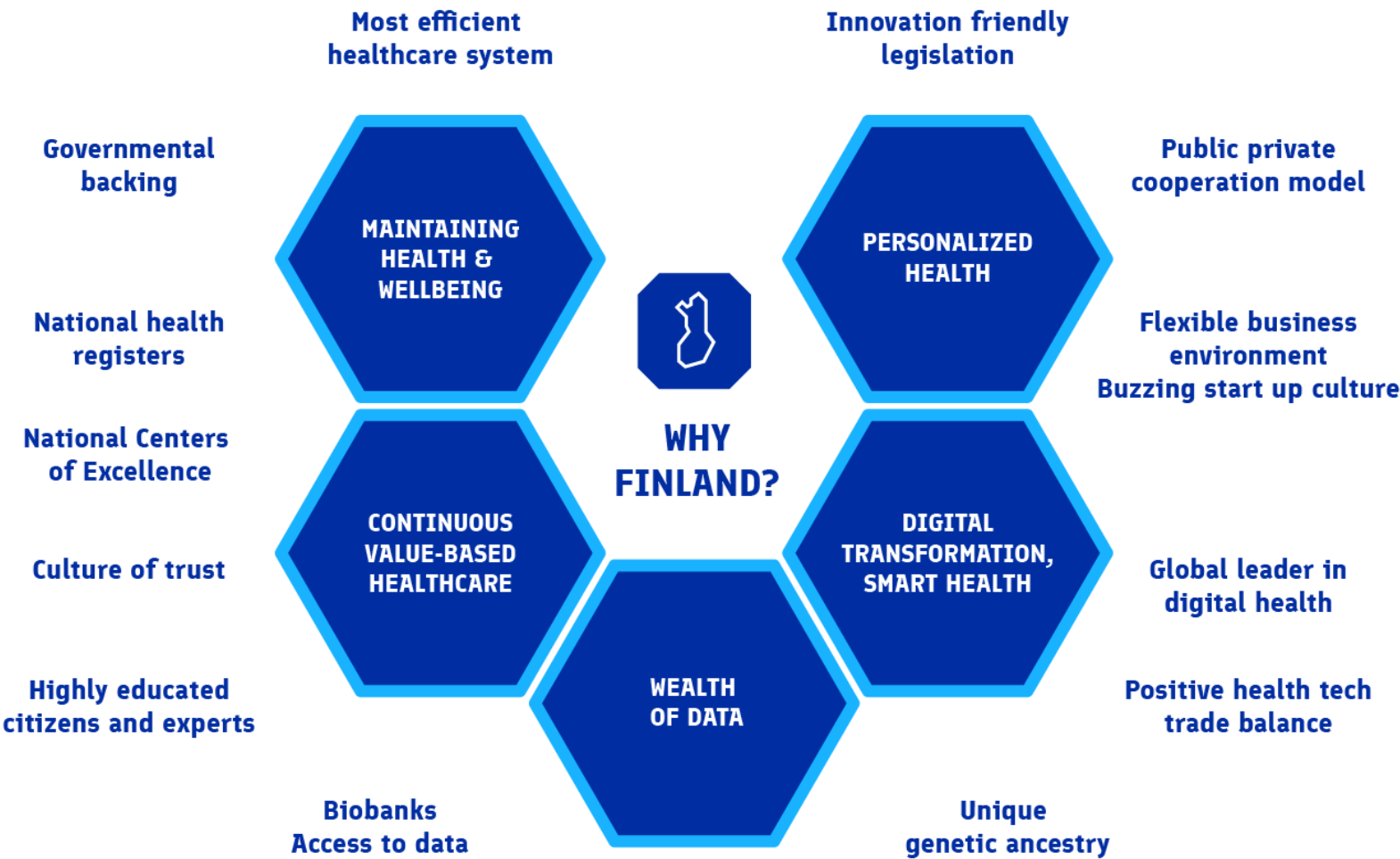
**AVAILABILITY OF
LATEST TECHNOLOGIES**

World Economic Forum Global
Competitiveness Report 2017–18

**INNOVATION-FRIENDLY
LEGISLATION -ACT ON THE
SECONDARY USE OF DATA**

stm.fi

WHY FINLAND?



FINLAND

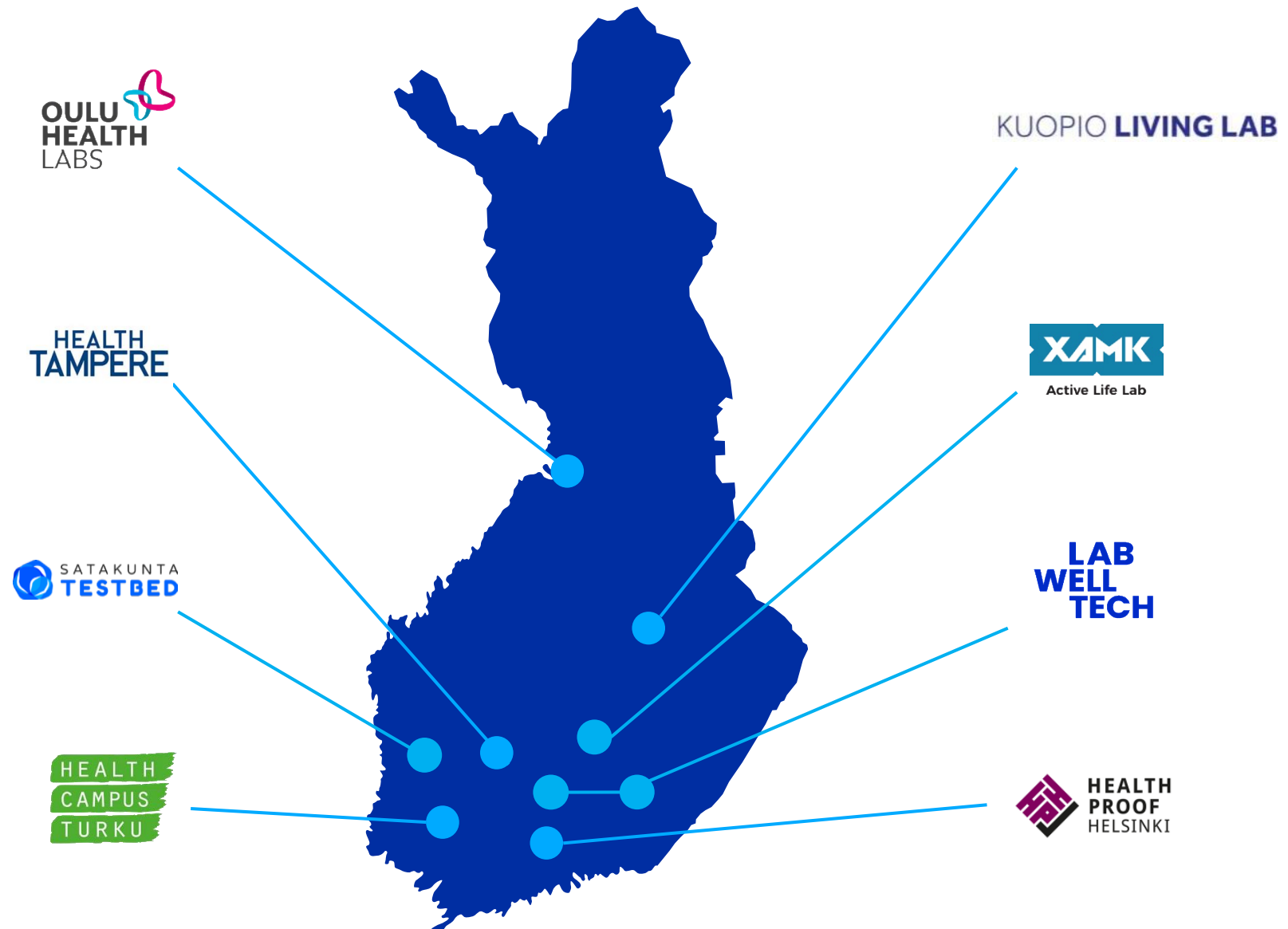


HEALTH TECHNOLOGY EXPORTS



One of the fastest growing high-tech
export sectors in Finland

8 HEALTHCARE TESTBEDS IN FINLAND



FINLAND



Thank you

Charlie Schick, PhD

Senior Advisor, Healthcare

Business Finland, Invest in Finland

charlie.schick@businessfinland.fi

Titta Houni

Senior Advisor, Healthcare

Business Finland

titta.houni@businessfinland.fi

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3D BIOMANUFACTURED HUMAN MODS

Enhanced Regenerative Performance



CEO

**SUCCESS
LEADER**

Tom Alapaattikoski
(M.Sc, MBA)



**HARDWARE
MASTERMIND**

Tomi Kalpio
(M.Eng)



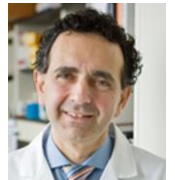
**BIOENGINEERING
SUPER STAR**

Dr. Eva Mueller
(Ph.D)



**SCIENCE OPERATIONS
GRAND MASTER**

Dr. Matthew Brovold
(Ph.D)

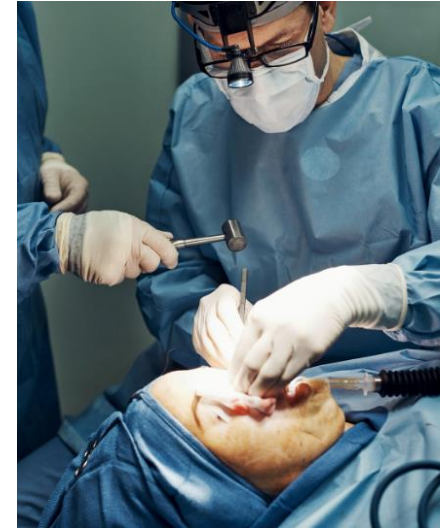


**INVENTED 3D
BIOPRINTING**

Dr. Atala
(MD, Ph.D)

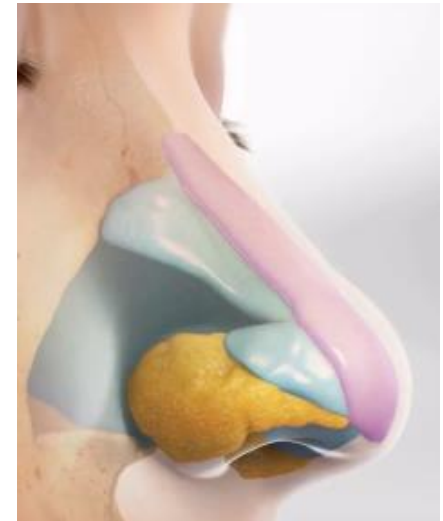
PROBLEM:

INDIVIDUAL
CARTILAGE
IS EXPENSIVE TO SOURCE, HARD TO
MANUFACTURE & SLOW TO REGENERATE



SOLUTION:

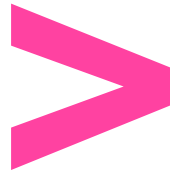
WE
ENGINEER
REGENERATIVE, PERSONALIZED
CARTILAGE*



BRINTER

\$10B MARKET FOR OUR CARTILAGE BIO-MODS (US)

1. MULTI-MATERIAL 3D BIOPRINTER



2. UNIVERSAL CARTILAGE BIOINK



= FIBRO-CARTILAGES



= HYALINE CARTILAGES

- BIO-SYNTHETIC
- ANIMAL-DERIVED
- 100% BIODEGRADABLE
- ENABLES REGENERATION
- NATIVE MECHANICAL PROPERTIES
- REDUCES REJECTION & INFLAMMATION

3. BIO MODS

Septal nose defect (NBI™)

\$1.0B (CAGR 15.9%)



Knee focal defect (ABI™)

\$1.2B (CAGR 6.9%)



Partial meniscus tear (MBI™)

\$2.7B (CAGR 8.9%)



+ Degenerative disc disease & socket tears

2024: FACIAL RECONSTRUCTION

2025: SIMPLE ORTHO

2026: COMPLEX ORTHO

2027: JOINTS

2023-2026

2025-2027

2026-2029

4. NOSE-MOD (NBI™) FIRST STRATEGY



**FAST & LOW COST
REGULATORY PATH**



**PREDICATE SPEEDS
OTHER PRODUCTS**



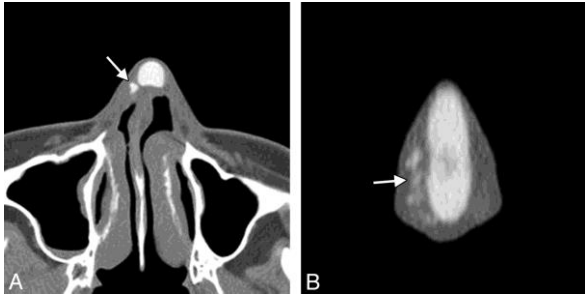
**REDUCES FUTURE
R&D COSTS**

COMPETITION

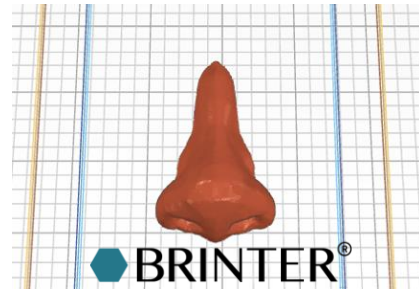


**Synthetic =>
Infections and
complications**

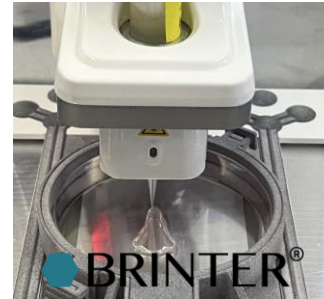
MAKING OUR CARTILAGE MODS:



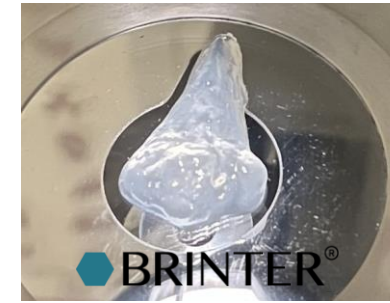
1. SCAN OF THE REGION OF INTEREST



2. BUILDING 3D MODEL



3. BIO-MANUFACTURING



4. TRANSFER



5. SURGICAL IMPLANTATION

**SAME DAY DELIVERY
(ACCELERATED WITH A.I.)**

USPTO PATENTS FOR ABOVE PROTOCOL PENDING

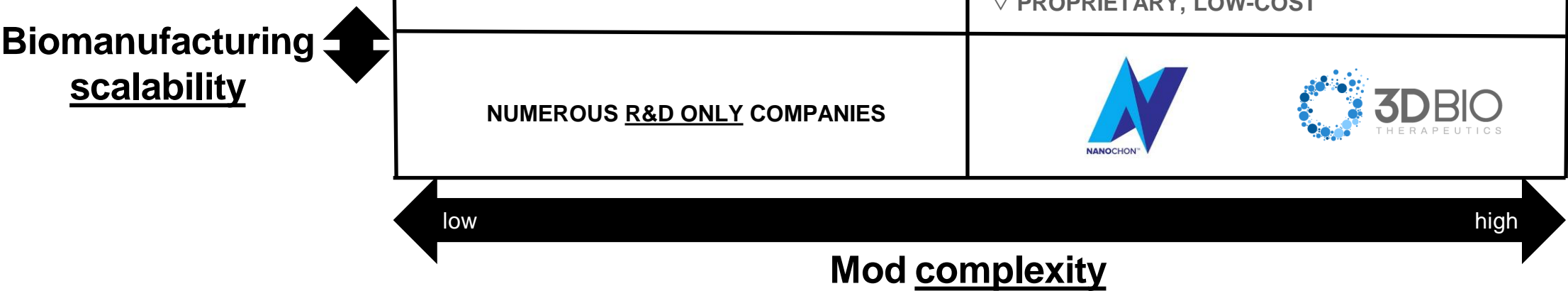
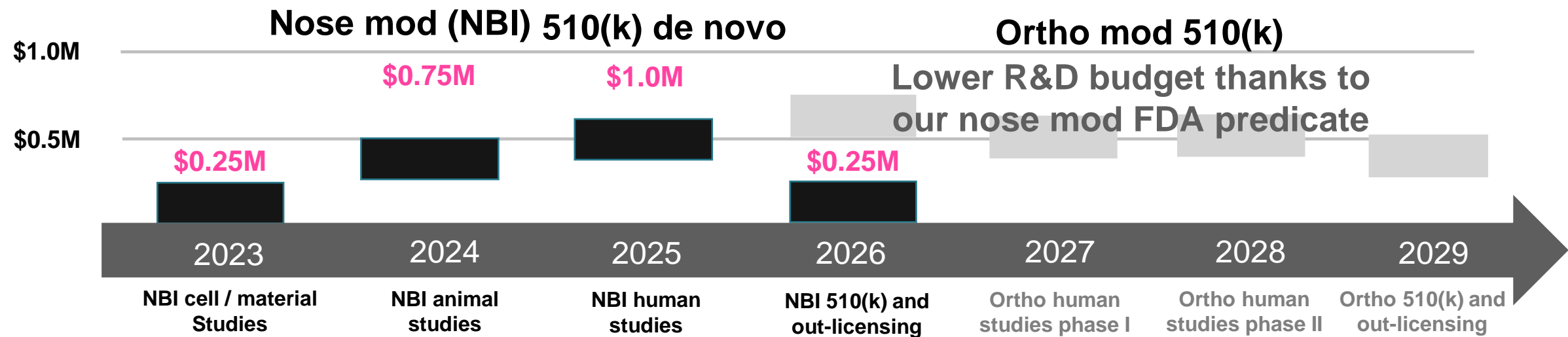


Potential protective similarities
with IPR fortress patents.

DETAILED PROTOCOL IPR INFO UPON REQUEST (DATA ROOM)

BRINTER

2.25M BUDGET AND COMPETITION



STORY AND VALUATION MILESTONES:

2018-2020

2021-SEP/2023

OCT/2023-2024

2025-2026

2027-2028



Accelerated
from
Finland.
 TURKU
BIOSCIENCE

\$1M

Proof of tech by
R&D sales.



\$4M



\$4M grants +
\$2M seed
raised.
 WFIRM
Wake Forest Institute for
Regenerative Medicine

\$6.1M

Nose dev starts.
2+7 USPTO
patents.



\$12.5M

RAISING \$2.25M
Nose animal trials
start.



\$15M

Nose animal trials
completed.



\$35M

A-round.
Nose human trials
start.



\$80M

Nose
commercial.



\$200M

Ortho human
trials start.



\$500M

Possible IPO or
acquisition



\$1B

OPEN ROUND OF \$2.25M AS OF OCT 2, 2023

**USE OF FUNDS IN 2023-2025
FOR NOSE-MOD (510(k) de novo)**

- ^\$0.25M Cell studies 2023**
- ^\$0.75M Animal trials 2024**
- ^\$1.00M Human trials 2025**
- ^\$0.25M Commercial 2026**



TH  NK YOU!

BRINTER

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Olo

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Next session starts at 12:50 p.m



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**Move fast together:
How DCT and regulatory
strategies can collaborate to
adopt advanced technology
early in development lifecycles**



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International Healthcare Opportunities with ECHAlliance and The Digital Health Society



Bleddyn Rees
The Digital Health Society



Andy Bleaden
ECHAlliance





hlth.

The Digital Health Society

October 2023

Bleddyn Rees

Chair at The Digital Health Society

 www.echalliance.com
 bleddyn@echalliance.com

@ECHAlliance
@BleddynRees



What is the Digital Health Society (DHS)?



- Created during the 2017 Estonian EU Presidency to promote digital health & the Estonian Xroad
- Multi-stakeholder involvement
- 200+ organisations participated
 - Patients, citizens, consumers representatives
 - Policy-makers: member states national ministries, regions, cities
 - Healthcare providers and professionals
 - Universities and research centres
 - Insurers (public and private) and their EU platforms
 - Companies (large and SMEs/start-ups)
 - Standards organisations
 - EU networks related to health, wellbeing and technology

The ECHalliance Group



DHS enables multi-stakeholder dialogue on healthcare data policies and practices. As a legacy of the Estonian Presidency of the Council of the European Union in 2017, it was formed to promote the adoption of digital health and the use of health data.
thedigitalhealthisociety.com/



GHCP connects global health communities targeting health inequalities, skills and data. The GHCP Council includes leading organisations from USA, Africa, Commonwealth, Australia, India and Europe. We launch high-level events on 4 themes: Disparities Globally, Digital Skills Workforce, Data & Digital Services and Green Health.
echalliance.com/the-global-health-connector-partnership/

International projects

Our Innovation Team delivers Research & Innovation projects in health and data sharing/governance, scouts funding opportunities for our community, builds consortia and designs project proposals involving our ecosystems and members.

As project partners we carry out policy and socio-economic studies, market analysis, exploitation and dissemination tasks and can lead on stakeholder engagement to ensure the project sustainability.





...bring together a permanent community of stakeholders to develop a joint health agenda, aiming to address and find common solutions to regional health challenges

Match Need and Solution

The main benefit of working together in an Ecosystem is the multiplier effect of collaborating in our International Network of Ecosystems.

- **break down silos,**
- **transform healthcare delivery,**
- **create economic growth**

ECHAlliance International Network of Digital Health Ecosystems



Thematic Innovation Ecosystems (TIE)

We have developed a brand new set of ECHAlliance Group Thematic Innovation Ecosystems that target cross-border themes led by our ecosystems and members to match need and solution and foster collaboration.



Argentina	Denmark Scandinavia Nordic Health 2030 SouthernDenmark	Germany Hess Nuremberg Rheinland Stuttgart & Neckar-Alb	Malta	Romania North East Transylvania South West Oltenia	Sweden Health & Welfare Technology North Sweden Life Science
Australia Melbourne	England London Manchester North West Coast Yorks/Humber South West Coast	Greece Athens	Mexico	Serbia	Turkey
Austria	Estonia	Hungary West Hungary	Moldova	Scotland Highlands & Islands Scottish Digital Health & Care	Ukraine
Belgium Brussels Flanders	Finland Central Finland Helsinki Kuopio Oulu Ostrobothnia South Ostrobothnia	India	Netherlands Health Valley Friesland	Slovenia	Uruguay
Bulgaria	France Bretagne Hauts-de-France Lille Nice Normandy Nouvelle-Aquitaine Paris	Israel	Northern Ireland	Spain Castilla y León Catalonia Basque Country Extremadura Galicia Com. Valenciana Madrid	USA Central Florida Massachusetts
Canada Canada Age Well Quebec		Italy Treviso	Norway Health Tech Cluster Smart Care Cluster	Sri Lanka	Wales
Chile		Lithuania	Poland		Zimbabwe
Czech Republic		Luxembourg	Portugal Digital Health Portugal Health Cluster Portugal SHAFE Portugal		
Croatia			Republic of Ireland		



- Thought leadership activities focused on digital and health data e.g the Round Table Programme
- Annual DHS Virtual Summit
- Digital and health data activities of the ECHAlliance Global Health Connector initiatives
- AI Club
- Providing expertise for EU funded research & development projects
- Planning Hospital clubs (benchmarking , collaborations for innovation and research and commercial activities).



Calls to Action on Health Data Ecosystems

RECOMMENDATIONS FROM
MULTI-STAKEHOLDER ROUND TABLES



Multi-stakeholder consensus recommendations

1 **Raise the digital, literacy & skills of all stakeholders**

2 **Generate and value trustworthy Real World Evidence**

3 **Accelerate interoperability across Europe and globally**

4 **Demonstrate benefits to society from data access, use and reuse**

5 **Adopt a risk stratification approach**

6 **Build a trustworthy framework for data access and use**

7 **Adopt a transformational approach to health data**

Multi-stakeholder consensus reports: scaling up health data ecosystems

Multi-stakeholder events and reports 2020-22,
joint with Digital Health Society, sponsored by MS, J&J and MSD



Read the DHS Round Table published reports



- The 5th Summit in 2023
- Moved to Virtual Summit 2-day format during the pandemic
- In 2022 almost 1,000 registrations from 95 countries!
- Industry, Academia, Policy Makers & NGOs
- Showcases innovations, capabilities of countries and informs and addresses key health policy subjects

#DHSSUMMIT23

5th DIGITAL HEALTH SOCIETY SUMMIT

14-15 NOVEMBER 2023

Register
free today



the
digital health
society

The data arm of
ECHAlliance Group



- Invite only & Chatham House rules apply to meetings
- Launched in 2022/23
- Chaired by Professor Rachel Dunscombe, UK AI Council & DHS Director.
- Industry (Tech, Pharma, Medtech), Academics, Clinicians, & Regulators are members
- 4 virtual meetings a year and some virtual email working. Spin off from Round Table Digital Health Programme.
- Discussing shared challenges, possible solutions and sharing know-how and information
- About to publish its first paper on AI in healthcare



Thank you!

To get involved with DHS
become an ECHAlliance
member



Bleddyn Rees

Chair at The Digital Health Society

 www.echalliance.com
 bleddyn@echalliance.com

@ECHAlliance
@BleddynRees



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Yellow Schedule

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Who we are //

We are global healthcare
scheduling experts

We are **Yellow** Schedule.

// experienced
// dependable
// transformative



OUR AMBITION

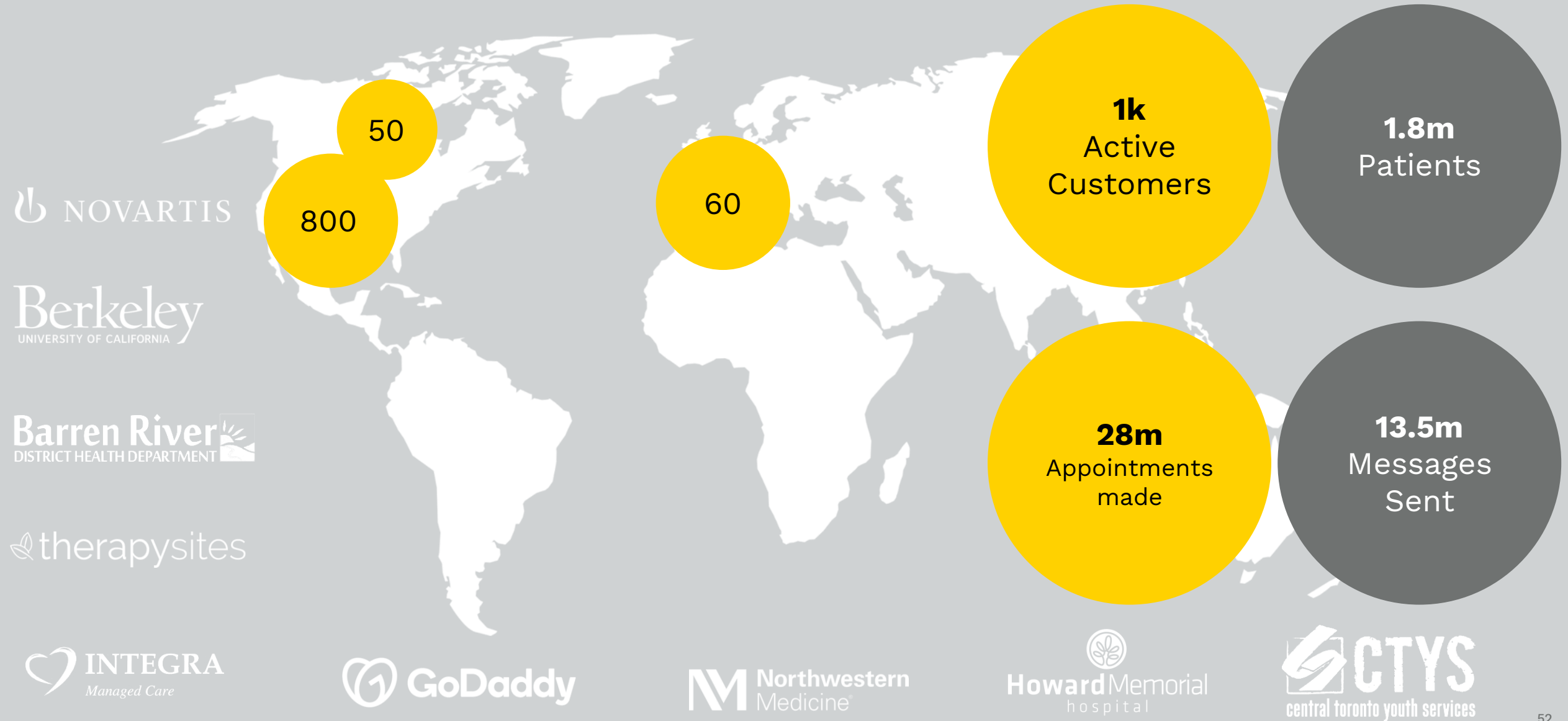
**To democratise
healthcare by
powering 20 million
appointments
annually.**

What we do //

Yellow Schedule provides modular and end-to-end solutions for:

- **Scheduling**
- **Visitor Management**
- **Patient Communications**
- **Workforce Scheduling**
- **Queue Management**
- **Waiting List Management**
- **Intake & Consent Forms**
- **Unified Bed Management**
- **Check-in Kiosks**

Who we do it for //



Martina Skelly

martina@yellowschedule.com

Kiosk #3441-16

We are **Yellow** Schedule.



// experienced
// dependable
// transformative

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Innovation Norway

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A scenic view of a Norwegian fjord, with steep, forested mountains rising from the water. The sky is blue with scattered white clouds. In the foreground, the water is calm, reflecting the surrounding greenery and the distant peaks.

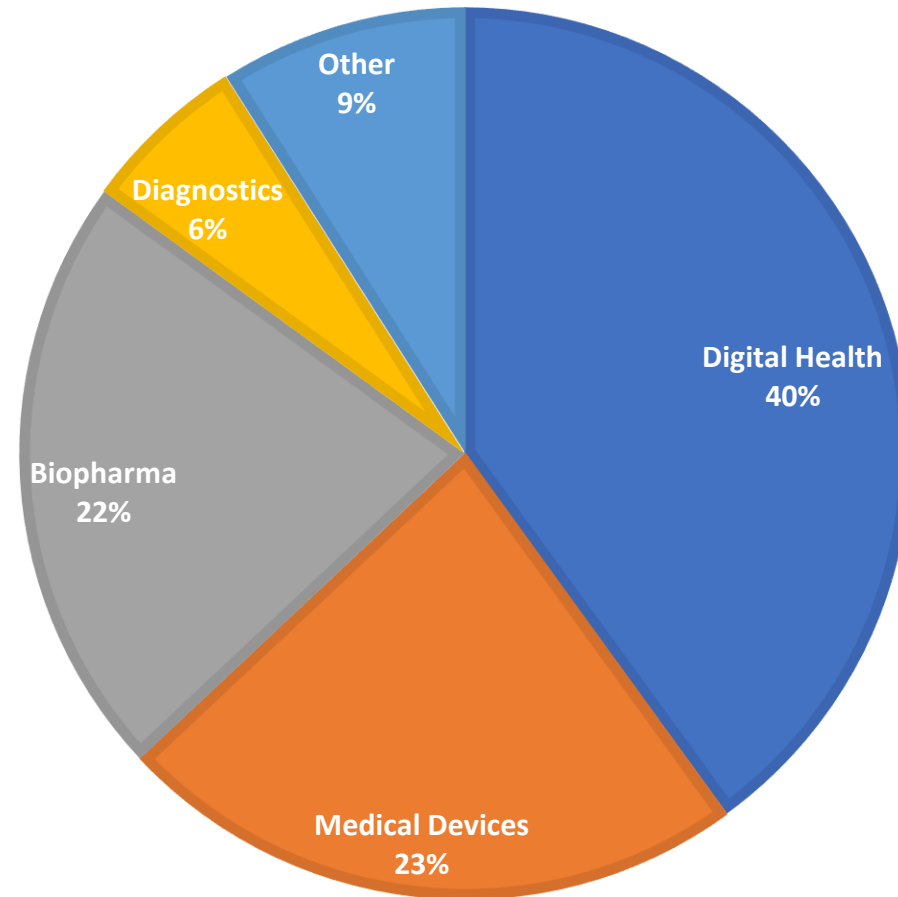
**Population of 5.5
million**

**Universal Health
Care**

**GDP of \$580
billion**

**Annual
Healthcare
spend \$58 billion**

NORWEGIAN HEALTHCARE MARKET





Digital Health:

- Education
- Healthy Ageing
- Remote Care
- Mental Health
- Dental



Medical Devices:

- Sensors/ Monitoring
- Wound Care
- Infection Control
- Surgical



Biopharma:

- Oncology
- Radiopharmaceuticals
- Personalized Medicine



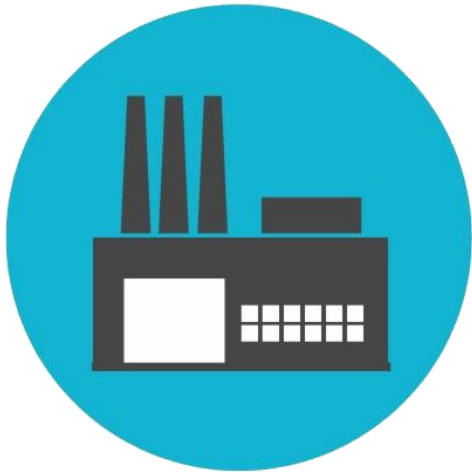
Diagnostics:

- Oncology
- Cardiovascular
- Remote Testing



Other:

- Hospital Improvement
- Aquaculture
- Utilization



Norwegian
Smart Care
Cluster



Norway
Health Tech



OSLO CANCER
CLUSTER



Market Research and Business Model Advisory	Healthcare Market Navigation	Secondary	Primary
Business Development	Service Provider Navigation	Capital Strategy and Access	Corporate Access
	Hospital Relationships	Payer Relationships	Conferences and Receptions (external and internal)
General Market Access Research and Advisory	Incorporate / Partner / Distributor	Logistics and Warehousing	Hiring, Insights and Strategies

Questions?

John Vislosky, Senior Advisor: john.vislosky@innovationnorway.no

Zach Holm, Health Advisor: zacharias.holm@innovationnorway.no

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Universal Genomic Screening for Cardiovascular Disease

Meg Samek-Smith
meg@multiplaihealth.com
+1 (410) 271 4994

Millions of people are at risk of coronary artery disease without knowing it

18m

deaths / year
#1 cause of mortality

15x

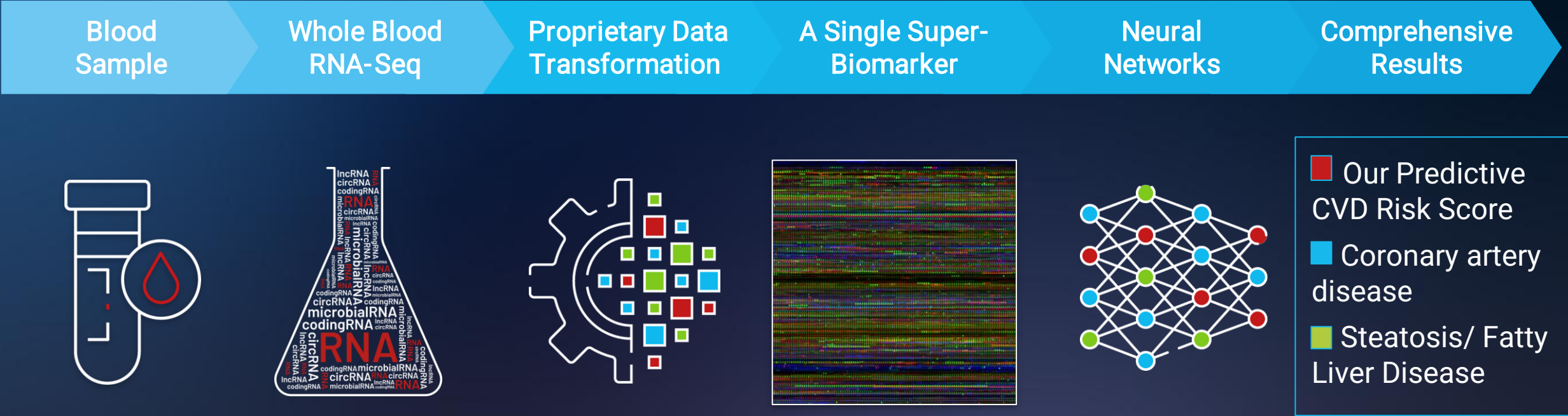
more women die of it
than **breast cancer**

#1

reason for waste in
healthcare spending

Traditional clinical risk stratification tools
misclassify 40-50% of people as low risk.

We Are Digitizing the Blood: Proprietary Process Perfected Through Six Clinical Studies



Administered
virtually
anywhere

Digital processing
of all biomarkers
in the blood

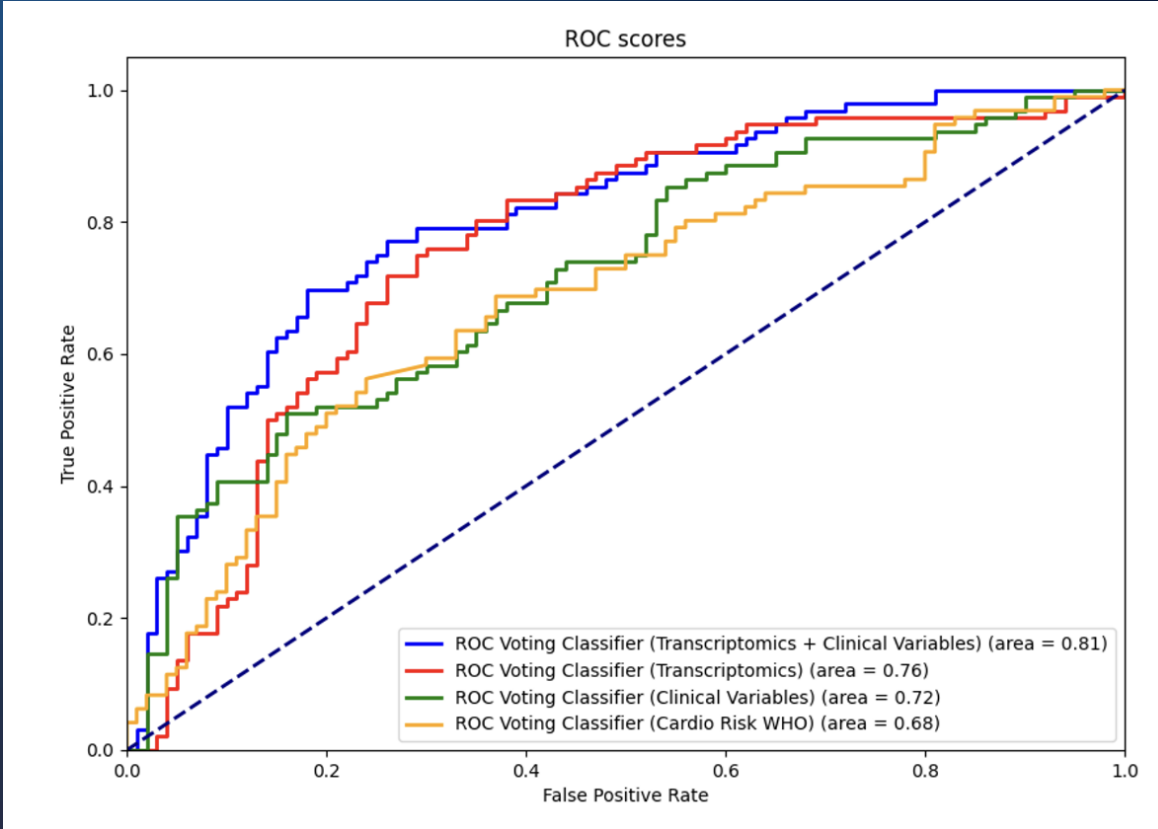
High processing
ability needed to
prepare data

1M pixel image
format ideal for
algorithmic analysis

Specifically
calibrated neural
network analysis

Guide decisive
& personalised
intervention

Our results are already 20% Better than the Clinical Standard in CAC detection:



Pilot Study Results **AUC 0.81** vs 0.68

- Higher accuracy in predicting coronary calcifications compared to the traditional approach
- Better performance guiding doctors with decision making

The Ask: What We Need to Keep Competing for Early Mover Advantage

Clinical Studies

Partners
and funding

Commercializing

Product
development
expertise

Series A

\$10 million,
lead investor
by Q3 2023

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Meg Samek-Smith
meg@multiplaihealth.com
+1 (410) 271 4994

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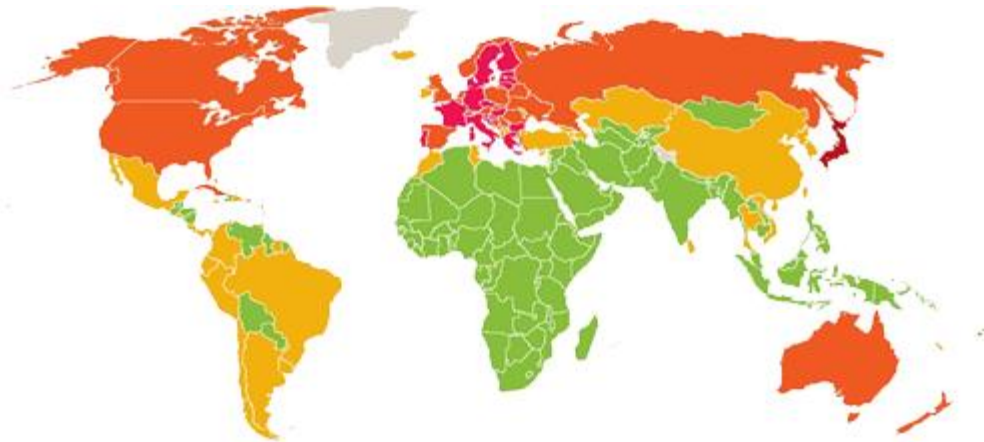
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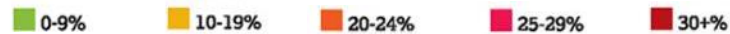
Digital Healthcare for Aging World



2015



2050



Dementia and Early Diagnosis

Dementia Cases

3x
(150m)

Potential Cost Saving
Of Early Diagnosis

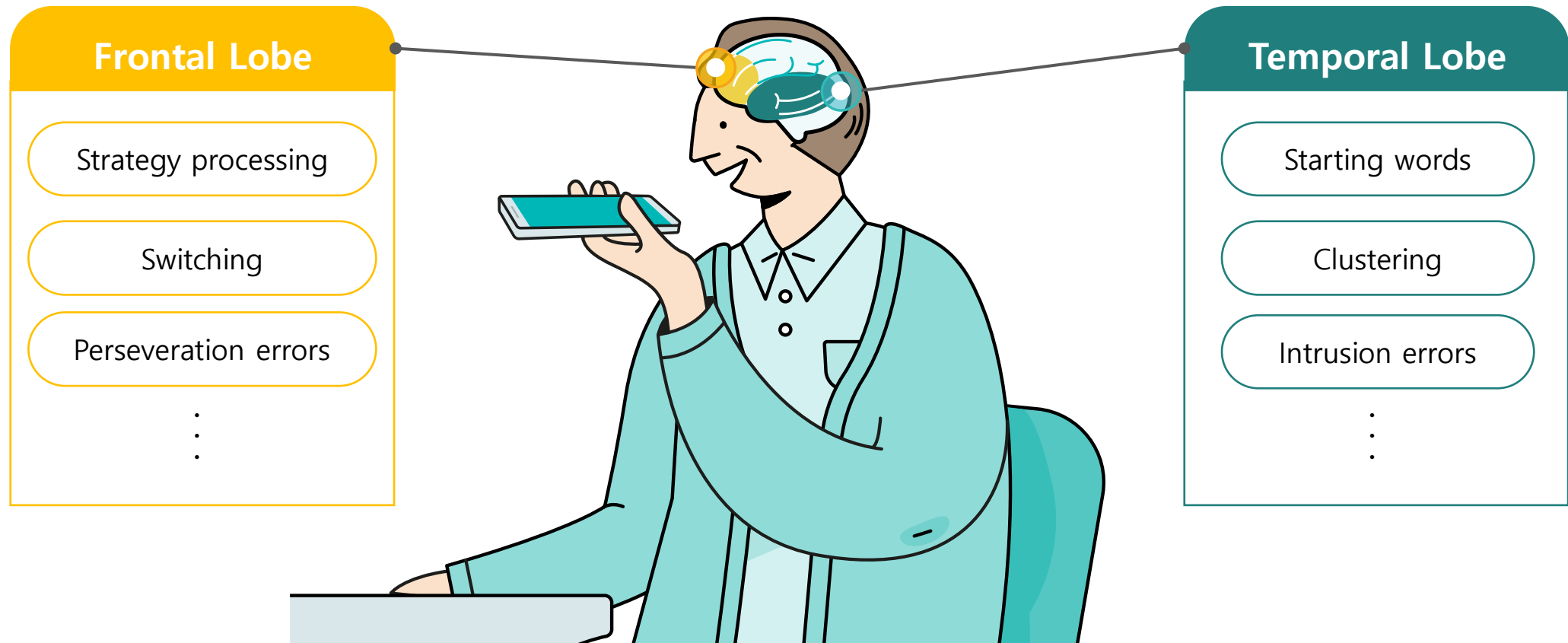
US\$7tn

Undiagnosed
Ratio in the US

91%



- Easy 1-min screening for dementia
- Analyzing verbal fluency and semantic memory
- 20 AI-algorithm for humanless screening



High accuracy despite short test time

- 3 clinical studies at Seoul National University Hospital + a 3rd party test
- Recognized for its innovation and originality by being published in three international papers
- Comparison of test results according to the severity of dementia
 - 100 patients with CDR < 1 vs. 100 contrast group : AUC (0.861)
 - 50 patients with CDR > 1 vs. 50 contrast group: AUC (0.944)



AUC

0.944

0.861

Response	Percentage
Yes	78%
No	18%
Don't know	4%

CDR < 1

CDR>1

Mar 2013

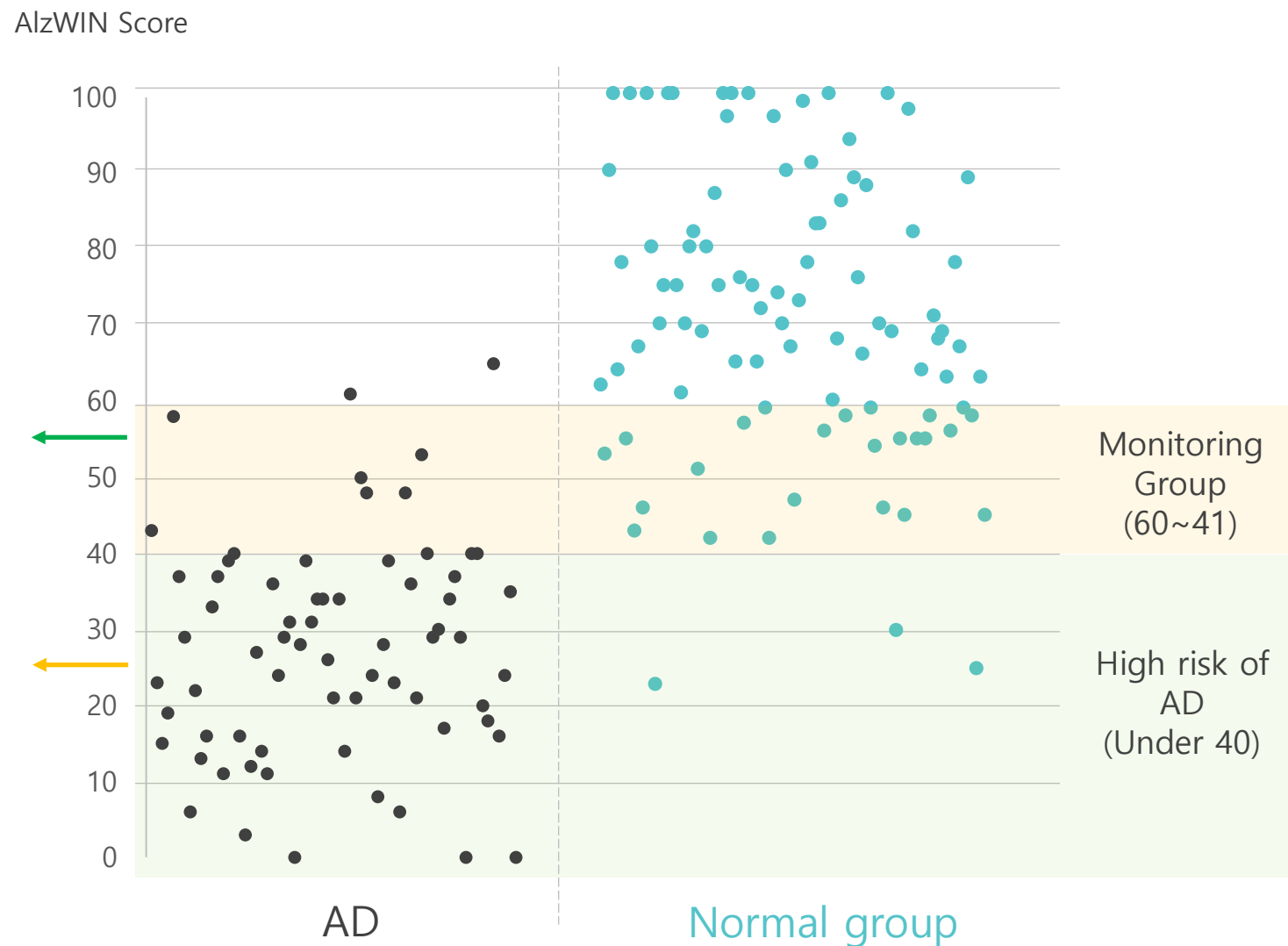
Jan 2014

July 2021

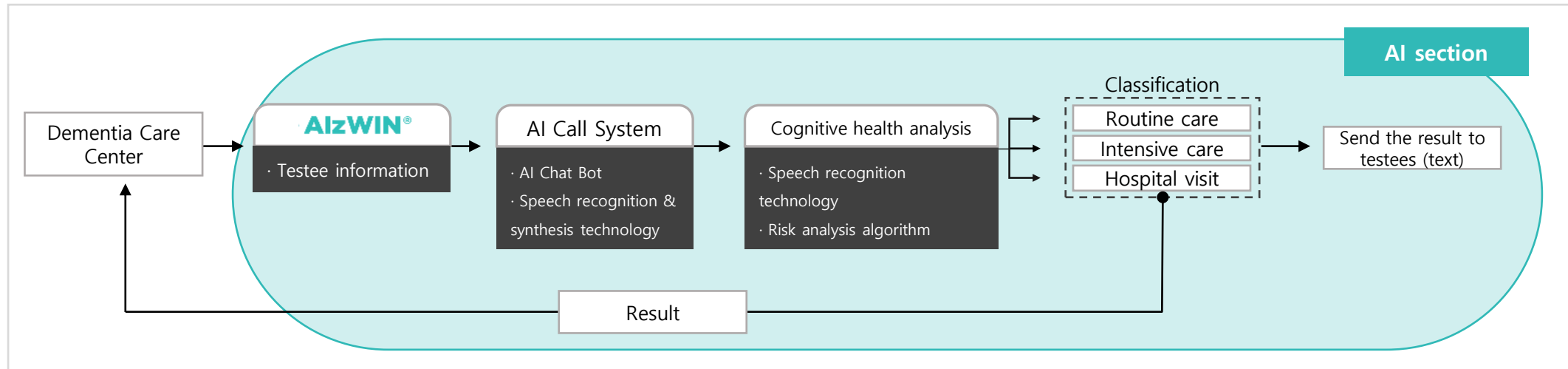
Oct 2022 test report

AlzWIN Algorithm Data (AD VS Normal group)

- The remaining is identified as high-risk group of dementia
- Most people with dementia score below 40
- Only 3 in the normal group scored below 40



I AlzWIN AI Call process



I 1st pilot project in Gyeonggi-do

AI Call recipient	1,011
Recommendation to visit the hospital	66
Elderlies visiting the hospital	64 (98%)

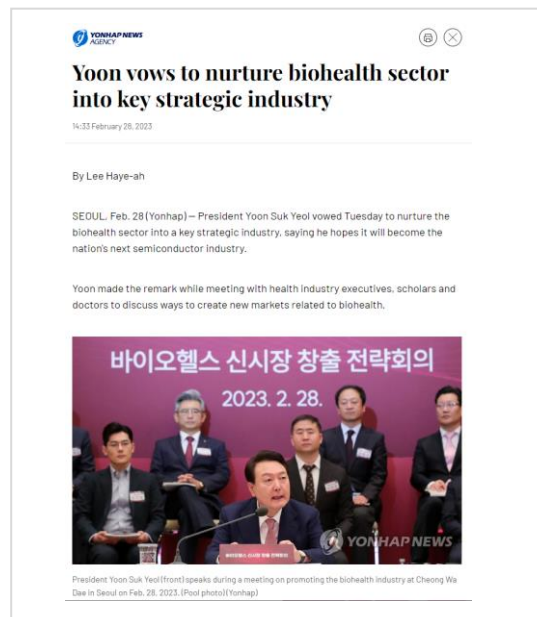
I 2nd pilot project in Gyeonggi-do

AI Call recipient	1,555
Test complete	460
Recommendation to visit the hospital	96

160 high-risk dementia group found

Domestic and international appreciation of AlzWIN

Presidential mention



- Presidential commendation



■ CES2023 Innovation Award



I Gyeonggi-do's excellent policy



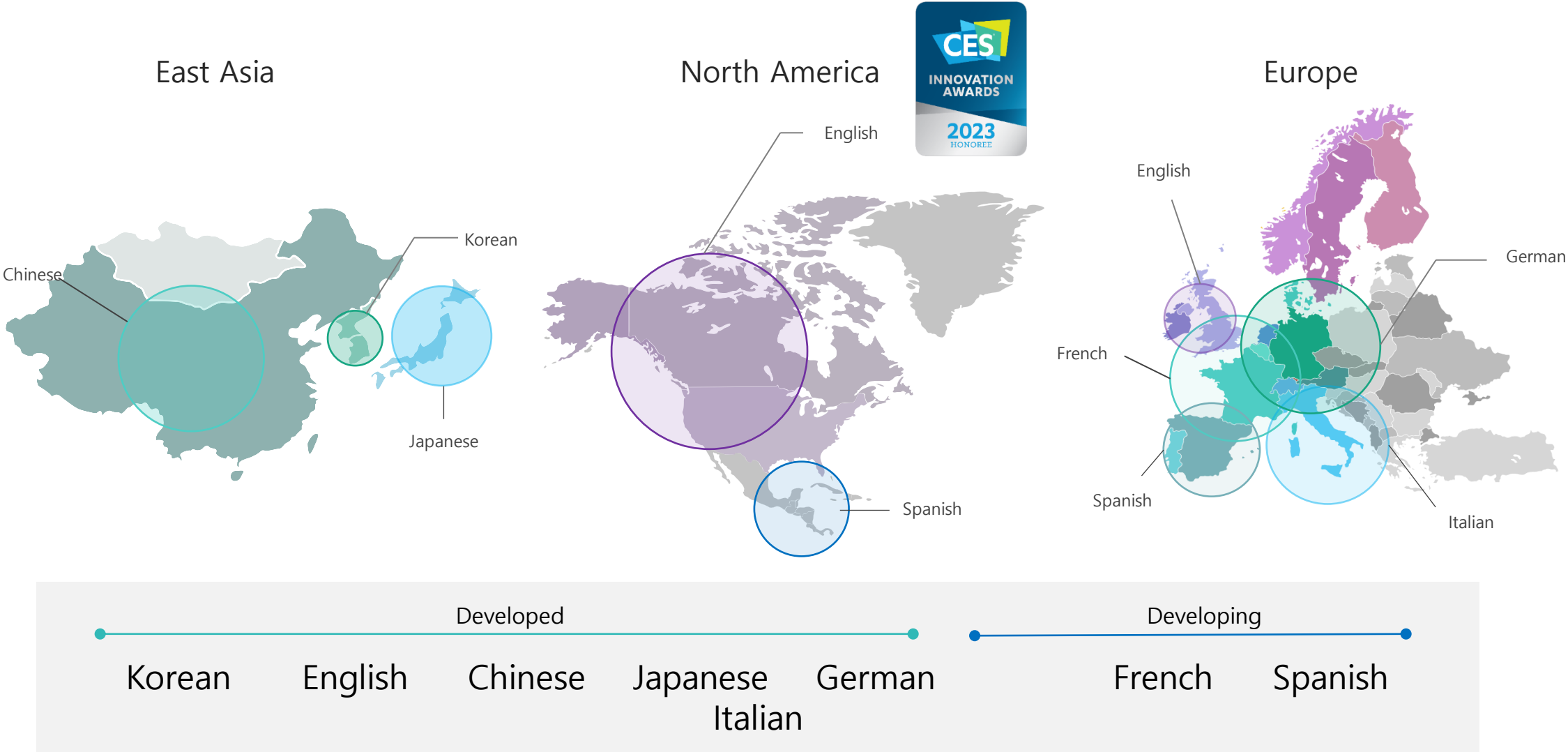
1st Business Development : Wellness Screening (Insurance)

I Samsung Life

I Hanwha Life

I Lina Life (Cigna)

Building global partnerships





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Best Pitching Prize #4YFN



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Barcelona 26 – 29 February 2024

Powering startups



785

Startups & Exhibitors

39

Countries
Represented

250

Startup
Pitches

88,500

MWC/4YFN
Attendees

Almost

1,000

Investors and
VCs attended
4YFN from 39
countries

€41B

of funds
represented

4YFN Award

1 Winner /  PAYFLOW

375

Conference
Speakers

116

Hours of
Content

39%



Female Speakers

8

4YFN Programmes

Digital Health
Tech & Planet
Frontier Tech
FinTech
EdtechInvestors
Partner
Programmes
Founders
Programme

Powering startups

26 — 29 Feb 2024

We're shaking up the world of Digital Health

Join us at 4YFN24.

4Y
FN



#4YFN24

4Y
FN



Welcome to
the 4YFN24
Health
Selection!

Prize package HLTH pitch winner

Highlights

- **4-day startup pod** at the heart of the Digital Health zone at 4YFN, 26-29/02/2024
- **MWC Discovery Pass** with access to 4YFN and MWC
- Access to the **Digital Health and Wellness Summit**, co-organized by ECHAlliance

And much more...

- Pitching opportunities
- Access to 4YFN exclusive lounge
- Invites to exclusive networking activities with investors
- Visibility and promotion

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HLTH Europe June 2024, Amsterdam



Sam Nicholl

HLTH Europe



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