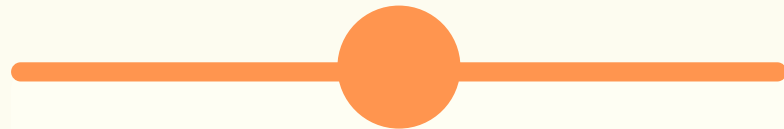


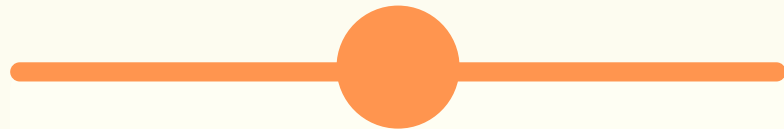
The UK Radiology System Is Running Out of Capacity

Structural demand growth, worsening specialist shortages, and a broken outsourcing model create a clear opening for a new approach.



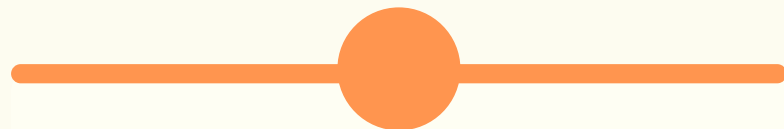
50M+

Imaging tests processed annually in England — and rising.



30% Shortfall

Radiologists critically undersupplied, especially at peak hours.



Zero Scale

No outsourcing model today is auditable or built to scale.



Nights & Weekends

Coverage gaps widen sharply when demand is hardest to meet.



THE SOLUTION

ClearRead Replaces Opaque Outsourcing with an Auditable, Human-Verified Reporting Chain



Transparent Marketplace

Open pricing — better rates for radiologists, real cost savings for hospitals.



AI Matching, Human Sign-Off

AI ranks the best-fit radiologist. Every report verified by a credentialed human — no exceptions.



Local Clinical Control

The requesting physician retains final sign-off. Governance stays at the point of care.

From Scan Upload to Signed Report



Upload

Scan submitted with modality, subspecialty, and priority.



AI Match

Best-fit radiologist surfaced by quality, availability, and price.



Report

Structured preliminary report delivered in standardized format.

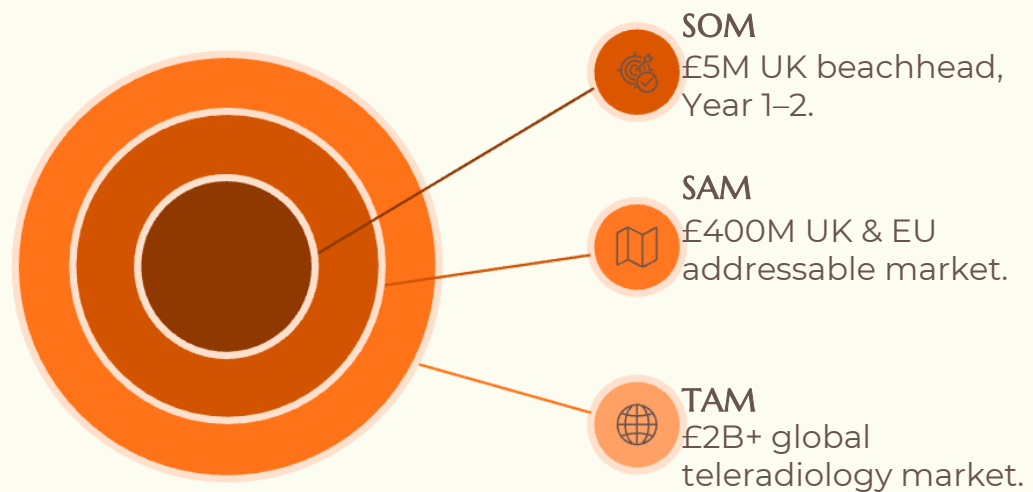


Approve

Local physician signs off — governance preserved at the institution.

A £200M–£400M UK Market, Growing 8–12% Annually With a Clear Beachhead Entry

Market Sizing



Market Context

£1.1B NHS outsourced radiology spend annually — growing under workforce pressure.

7M+ imaging cases waiting across England post-pandemic.

1 in 10 consultant radiologist posts currently unfilled in the UK.

France: similar structural shortage — natural first EU expansion market.

Why Now

Structural radiologist shortages with no near-term supply relief.

Aging populations driving sustained imaging volume growth.

8–12% CAGR backed by NHS digitization and post-pandemic backlog.

No Competitor Covers the Full Reporting Chain — ClearRead Does

No competitor combines marketplace model, AI-first matching & scoring, human verification, local traceability, and performance intelligence, democratizing cross-border tele radiology

Player	AI Enabled	Human Verification	Local Traceability	Performance Engine	Labor Economics
Traditional Teleradiology — Everlight / Medica / 4ways	X	Partial	X	X	X
Workflow Vendors — Lifetrack / Sectra / GE Healthcare	X	X	Partial	X	X
AI Point Solutions — Aidoc / Qure.ai / Lunit	✓	X	X	X	X
Rad AI	✓	Partial	X	X	Partial
ClearRead	✓	✓	✓	✓	✓

ClearRead is the only player with all five capabilities in a single auditable chain.

Three Phases From UK Beachhead to Global Radiology Infrastructure

