



02 · MARKET & OPPORTUNITY

A high-ARPU segment *the world's software ignored.*

TAM US\$47B · 5,200 TARGET ELITE CLINICS · GULF · MEDITERRANEAN · EUROPE · ASIA

The opportunity is not “clinic software”. It is the **operating layer of elite and longevity medicine** — a fast-growing, premium, under-served market where a generic tool cannot compete.

<p>\$47B</p> <p>TOTAL ADDRESSABLE MARKET</p>	<p>5,200</p> <p>TARGET ELITE CLINICS WORLDWIDE</p>	<p>4</p> <p>PREMIUM VERTICALS SERVED</p>	<p>8+</p> <p>LANGUAGES BY SIGNED TERRITORY</p>
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01 THE FOUR VERTICALS

VERTICAL	WHAT CLINIOS ORCHESTRATES
Premium aesthetics	High-end aesthetic practices: patient memory, journey, multilingual concierge-grade experience.
Regenerative & preventive longevity	Preventive, longevity-oriented medicine — the fastest-growing demand pool and the Vision 2030 pivot.
UHNW clinical longevity	Ultra-high-net-worth clinical longevity, where a €112k platform is proportionate to the patient base.
Medicalised spa & wellness	Luxury medical spa & hotel-spa operations — the CLINIOS wellness-intelligence extension.

02 WHY NOW

- ◆ **The longevity boom.** Preventive and longevity medicine is moving from niche to mainstream among affluent patients worldwide.
- ◆ **AI enters the clinic.** Clinical intelligence and agentic workflows are crossing from promise to deployment.
- ◆ **Gulf health transformation.** Vision 2030 is funding prevention, e-health, AI and private-sector elite care at national scale.
- ◆ **UHNW health spend.** The world's wealthiest are spending more on longevity, in their own language and on their own terms.

03 COMPETITIVE LANDSCAPE

A category is forming and several funded players claim it. We never disparage a competitor; we acknowledge, then re-centre on the ground only we own.

PLAYER	POSITIONING	THREAT
iksa.ai	AI-native OS for longevity clinics; architecturally close to ours.	High · twin
Reya.AI	All-in-one agentic OS for longevity & wellness; targets our spa/resort verticals.	High · verticals
	360° preventive platform; 20 years of data, 5M+ lives.	Mid · data

Longevity AI		
Longevitix	Preventive clinical intelligence; 15 AI specialists per organ.	Mid · narrative
WAJ & Nabd	AI health & wellness SaaS, Dubai; 500+ firms across MENA.	High · GCC
Zenoti / Pabau	Aesthetic & med-spa software, multi-country (~\$160–176/mo).	Indirect · price

04 OUR DEFENSIBLE GROUND

WHAT ONLY WE OWN

Native EN·FR·AR + Gulf cultural codes; pure UHNW focus; medically-led credibility; an introducer network across the Gulf, the Mediterranean and the Maghreb.

THE BEACHHEAD

A scarce founding cohort of 24 elite clinics at €112k ARR, then disciplined territory-by-territory scale — quality over volume, into the \$47B opportunity.

A \$200/month tool manages appointments. CLINIOS orchestrates the entire experience of an elite clinic. One does not compare a sedan with a private concierge service.

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