2017

Comparison: Philips ISP vs TeraRecon
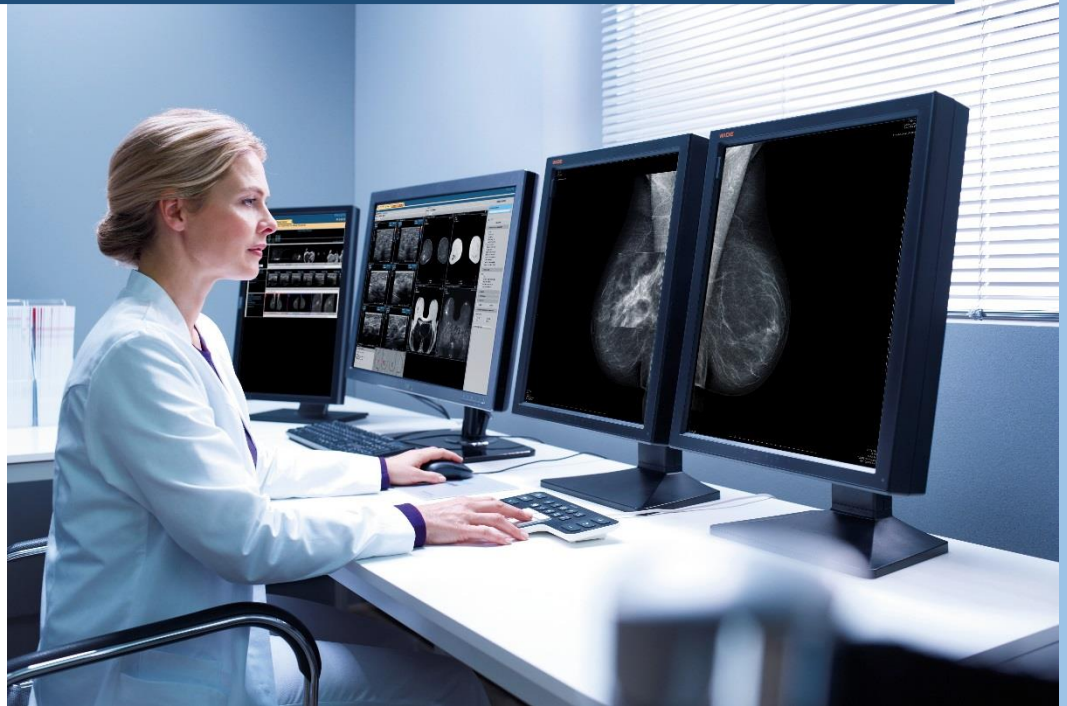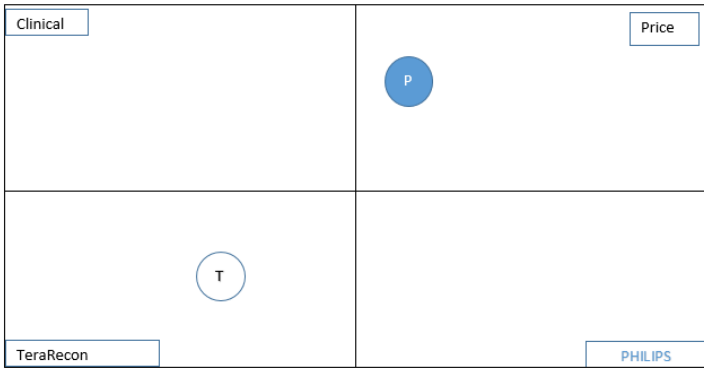
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1. Overview: An Imaging Solution

A. TeraRecon (Tera): Key Product Highlights:

1. TeraRecon **Concurrency Model** based on:
    - Based on CCU
    - Based on reading capacity or slice
    - Both

2. **Smart Positioning:** Tera's technology is based on Graphic Processing Unit (GPU)
    - Each graphic card varies from 4 GB to 8 GB
    - Every single GB is capable of processing 1,500 slices. E.g.: 4 GB = 6,000 slices
    - Hence Tera positions its solution as "Unlimited User" with 6000 slices or so on; hidden underneath – story around number of slices.

3. **Clinical strength**
    - CT Colonoscopy
    - Vessels Analysis.

4. **Core-technology (IT)** background: Enabling application workflow and below areas of strength:
    - HL7, pre-fetching etc.
    - Interface & multi-modality compatibility

5. **Additional feature** functionality
    - Zero Foot Print, 3D Printing & VM Compatibility:
    - Basic Research platform

6. **Customer support**
    - Primarily done by Channel Partners, and IT Support Desks (no on-site Clinical Specialists)

7. **Limited direct** Sales & Support
    - North America / BNLX / UKI / France / IBERIA / IIG / Nordics and DACH.

B. Snapshot: Quick Comparison

PHILIPS	terarecon
Modality OEM	Information Technology / Enterprise AV vendors
End-to-End Clinical Informatics Organization	Pure play Imaging Solution Provider
Strong Clinical depth	Clinical depth limited to imaging
3rd party apps are successful in integration	Focused only on their solution component
Defined road map for Multimodality	Limited modality coverage/roadmap
Strong In-Person Customer Service	Greater focus on remote services
Primary Contact: Philips (e.g. Installation & upgrades done by us using proprietary tools)	Primary Contact: Resellers (e.g. Installation & upgrades done remotely by sharing the URL)
Turnkey solution (incl. hardware, in person site assessment, networking and system integration)	Standalone Imaging Solution
~7048 ICAP Specific customers Globally*	~ 5000 customers Global** Largest market North America Direct Markets (N.A / UKI / France / Italy / DACH and BENELUX) All other markets – resellers /distributors and partners
IntelliSpace Portal 9 Brochure (URL Link)	TeraRecon Brochure(URL Link)

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2. High level feature Comparison

Sl. No.	Philips Application Name	TeraRecon Application Names	Philips	TeraR.
1	CT Comp Cardiac Analysis	Time Volume Analysis(TVA)(CT) / Vessel Analysis	x	x
2	Multimodality AVA	Vessel Analysis	x	x
3	CT Calcium Scoring	Calcium Scoring	x	x
4	IE Enhancement	iGENTLE	x	x
5	Multi-modality viewer	iReview / iEMV (ZFP)	x	x
6	Multimodality AVA/CT AVA Stent Planning	Vessel Analysis	x	x
7	CT EP Planning	Time Volume Analysis(TVA)(CT)	x	x
8	Segmentation (CT/MR)	Segmentation Analysis and Tracking(SAT)	x	x
9	Workflow with Report	Free Basic functionality (iNtuition Viewer)	x	x
10	Multi-modality viewer & CT Viewer	iReview / iEMV (ZFP)	x	x
11	Subtraction	CT/CTA/MR Subtraction	x	x
12	Portal Routine MR	-	x	-
13	MR MobiView	-	x	-
14	Spectral Apps	-	x	-
15	MR Qflow	Flow Dynamic-MR	x	x
16	MR Cardiac	Time Volume Analysis(TVA)(MR)	x	x
17	Pre-Fetch	Free Basic Functionality	x	x
18	CT Lung Nodule Assessment	Spherefinder L	x	x
19	CT Dental Planning	Maxillo-Facial	x	x
20	CT Liver Analysis	Lobular Decomposition(LD)		x
21	CT Advanced Brain Perf	-	x	-
22	CT BP Time Insensitive Maps	TDA – Time Dependent Analysis	x	x
23	MR Neuro Perfusion	TDA – Time Dependent Analysis	x	x
24	MR Diffusion	TDA – Time Dependent Analysis	x	x
25	MR FiberTrak	Only BETA in 2016	x	x
26	MR SpectroView	-	x	-
27	MR iView Bold	-	x	-
28	MR Subtraction	MR Subtraction	x	x
29	CT COPD	LowAtt	x	x
30	Lung Nodule Assessment (V8)	CT Lung	x	x
31	Lung Nodule CAD (V8)	SphereFinder L	x	x
32	LNA LungRADS Categorize Report	-	x	-
33	LNA Risk Calc. (McWilliams)	-	x	-
34	Lung Nodule Assess. Pre-Fill	-	x	-

35	CT Pulmonary Artery Analyses	CT Lung	x	x
36	CT PAA CAD	-	x	-
37	CT Cardiac Viewer	CT Cardiac Viewer (Basic)	x	x
38	CT TAVI Planning	CT TAVI (Advanced)	x	x
39	CT Myocard Defect Assessment	-	x	-
40	CT-NM MPI Cardiac Fusion	-	x	-
41	CT Cardiac Plaque Assessment	CT CTA CCA	x	x
42	CT Dynamic Myocardial Perf	-	x	-
43	Cardiac MR Quantitative Map	-	x	-
44	MR Cardiac Temp. Enhancement	-	x	-
45	MR Cardiac Whole Heart	-	x	-
46	CT AVA Stent Planning	Vessel Analysis	x	x
47	MR MobiView	-	x	-
48	Q-App GI 3DQ	-	x	-
49	Enhanced MMTT	Finding Workflow (CT Only)	x	x
50	MM Tumor Tracking – qEASL	Finding Workflow (CT Only)	x	x
51	CT Body Perfusion	TDA – Time Dependent Analysis	x	
52	CT Virtual Colonoscopy	FlyThrough	x	x
53	CT Virtual Colon CAR	SphereFinder Colon	x	x
54	CT VC Elec. Cleansing	-	x	-
55	CT Liver Analysis	Lobular Decomposition(LD)	x	x
56	MR T1 Perfusion	TDA – Time Dependent Analysis	x	
57	MR Permeability	-	x	-
58	Q-App ROI	-	x	-
59	CT Dental Planning	Maxillo-Facial	x	x
60	MR Cartilage Assessment	-	x	-
61	CT Bone Mineral Analysis	-	x	-
62	CT Acute Multifunctional Rev.	-	x	-
63	MR Echo Accumulation	-	x	-
64	Q-App EQ	-	x	-
65	QApp Elastography Analysis	-	x	-
66	QApp Microvascular Imaging	-	x	-
67	QApp US Vascular Plaque Quant.	-	x	-
68	QApp Intima Media Thickness	-	x	-
69	NM Comprehensive Review	-	x	-
70	NM Enhanced DVD Viewer	-	x	-
71	NM Processing App Suite	-	x	-
72	NM Add'l JETPack App License	-	x	-
73	NM Astonish Recon Suite	-	x	-
74	NM ExSPECT II Vantage	-	x	-
75	Enhanced Zero-Click Performance	APS (Advance Preprocessing Server)	x	x

Business Model Comparison & Counter Strike:

TeraRecon solutions are much cheaper than us because of following key points.

1. Pure-play Medical Imaging Information Technology organization; Investments in R&D for modalities, Patents etc. are extremely less
2. Resellers play a very significant role. Majority of the business is via Resellers / Channels. Deployment, Installation, Upgrade, Support and Service is handled by the Channel. Hence a low cost footprint.
3. Modality agnostic approach: Helps garner better success rates, especially in non-Philips (modality) accounts.
4. Customer support: Primarily done by Channel Partners, and IT Support Desks (no Clinical Specialists)
5. No differentiation between Warranty & Service Contract

Countering TeraRecon:

1. Focus on end-to-end Patient Centric Solution across clinical departments – Aimed at a seamless flow of clinical and administrative data.
2. Strong proven presence in 'Leader' category of Healthcare Providers
3. Impact Healthcare Policy & Regulatory changes – since we actively participate and are a part of various agencies and decision making bodies.
4. Rich legacy of innovative solutions (high patents) and true-multi-modality support – Distinct First-Mover advantage
5. Multiple Levels of Service Options: Right from Telephone Support to 24x7, On-Site Resources
6. TeraRecon provides 1 major upgrades and 6 updates every year; leading to multiple issues like (system down-time, training, data-porting etc.). Philips typically has once-a-year major upgrade thus addressing above issues.

Disclaimer: * As per the data available for Install base.

         ** As per the data available from different sources so it may differ little bit.

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Note: In case of questions / comments or concerns please write at: hit.sec.icap@philips.com