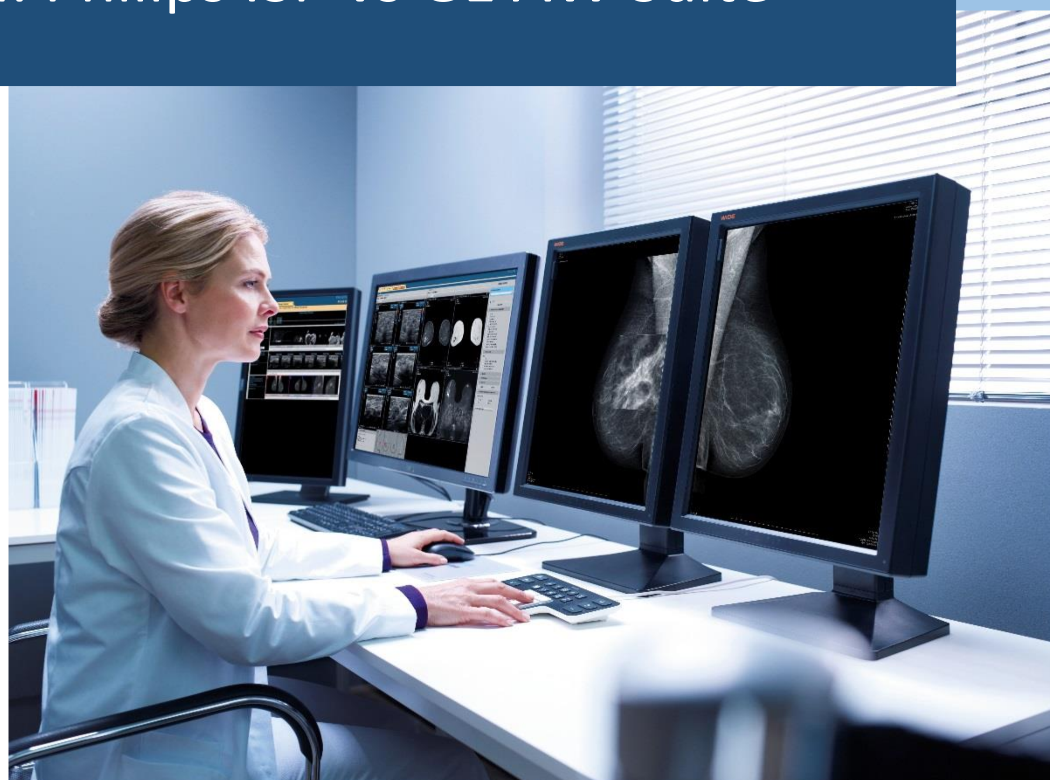
2017

Comparison: Philips ISP vs GE AW Suite



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HI – Sales Enablement Center

10/6/2017

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CONTENTS Pg.

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1. <u>Overview: An Imaging Solution</u>

A. GE Healthcare: Key Product Highlights:

1. GE Healthcare **Concurrency Model** based on:
    - Concurrent Users (CCU)
    - Direct Licensing
    - Both

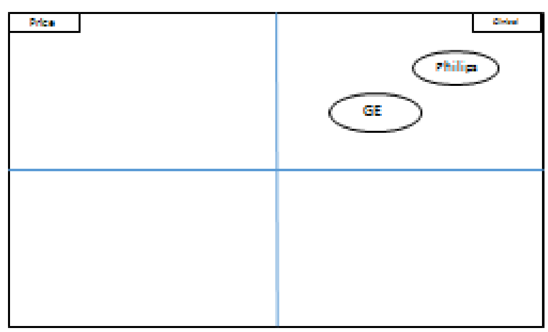
2. **Smart Positioning:** "Universal Viewing Solutions"
    - AW Workstation
    - AW Server (Need for 2 Slave servers)
    - Universal Viewer – AW with PACS:
        - 5 apps of AW + PACS
        - 12 apps of AW + PACS
        - Complimentary AV applications in case of Centricity (AW PACS)
    - Hosted / Cloud Solutions

3. **Clinical strength**
    - Install Base Leader
    - Circle, Arterys [1] & GE signed agreement for cardiac MR post-processing software
    - GE Synthetic MR is integrated in GE MAGiC
    - Collaboration with Vioswork[2] for Cloud-based services
    - GE Healthcare selects Apervita to help expand its advanced analytics portfolio

4. **Implementation & Customer support**
    - Partners with leading System Integrators (SI). To build and deliver customized value added solutions. E.g.: Capgemini & Tata Consultancy Services (TCS), two leading system integrators, work on building customized applications based on the GE Health Cloud
    - 24/7 Remote Support via common support teams (no dedicated AW support). Achieved by leveraging the strong internal alignment with modalities business groups
    - Large, wide-spread direct salesforce & broad distributor network covering not just large cities but also major towns and provinces.

[1] Circle: Circle provides cardiovascular post-processing software for viewing and analyzing CMR & CCT images
[2] Vioswork: 4D Flow CMR exam that can be completed in as little as 8 to 10 minutes—without breath holds

B. <u>Snapshot:</u> Quick Comparison

<table>
<tr><th>PHILIPS</th><th>GE Healthcare</th></tr>
<tr><td>Modality OEM</td><td>Modality OEM</td></tr>
<tr><td>Customer Support:
Mon. – Fri. with ISP/ICAP focus)</td><td>24/7 Customer support by aligning with modalities teams’; provided in major local languages; outside of working hours, English language support is provided</td></tr>
<tr><td>Strong clinical depth</td><td>Limited clinical depth; however with partnership with Circle – this is expected to be a strong area</td></tr>
<tr><td>Strong local presence (esp. in EMEA) in most markets for ISP Sales and Service</td><td>Relatively less dedicated teams for AW in EMEA. Modality colleagues also carry AW revenue targets</td></tr>
<tr><td>Defined roadmap for vendor neutrality</td><td>No concrete plans for vendor neutrality</td></tr>
<tr><td>ICAP at #3 KLAS Report</td><td>AW Server #4 Category</td></tr>
<tr><td>ICAP service contracts priced between 9% to 16% of deal value</td><td>ICAP service contracts priced between 8% to 15% of deal value. Large deals could be as low as 6%.</td></tr>
<tr><td colspan="2">Both organizations face challenges towards deploying hosted/Cloud-based solutions. Especially with regulatory requirements of having the servers located within the country (e.g. UK, Sweden, Norway)</td></tr>
<tr><td colspan="2">
</td></tr>
<tr><td>IntelliSpace Portal 9 Brochure (URL Link)</td><td>GE Healthcare Brochure(URL Link)</td></tr>
</table>

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2. High level feature Comparison

Sl. No.	Philips Application Name	GE Healthcare	Philips	GE Healthcare.
1	Multi Modality Viewer (MMV)	Advantage SIM MD	x	x
2	MR Mobiview:*Multi Modality Viewer (MMV)	BodyView	x	x
3	MR Diffusion:*MR FiberTrak:*MR T2 Neuro Perfusion:*MR SpectroView:*iViewBold:*Multi Modality Viewer (MMV)	BrainView	x	x
4	Multi Modality Viewer (MMV)	Integrated Registration	x	x
5	Multi Modality Viewer (MMV)	READY View	x	x
6	MM Advanced Vessel Analysis (AVA)	Autobone & Vessel IQ Xpress	x	x
7	MM Advanced Vessel Analysis (AVA	Dynamic Shuttle	x	x
8	MM Advanced Vessel Analysis (AVA	MR VesselIQ Xpress	x	x
9	CT Tavi Planning	Tavi Analysis	x	x
10	CT Tavi Planning	Valve Planning	x	x
11	CT Comprehensive Cardiac Analysis (CCA)	CardIQ Function Xpress	x	x
12	CT-MI MPI Cardiac Fusion	CardIQ Fusion	x	x
13	CT EP Planning	CardEP	x	x
14	CT Calcium Scoring	Smartscore 4.0	x	x
15	CT Body Perfusion:*CT Brain Perfusion	CT Perfusion 4D Multi-organs	x	x
16	CT Virtual Colonoscopy	Advantage CTC Pro3D EC	x	x
17	CT Lung Nodule Assessment	Lung VCAR	x	x
18	CT Brain Perfusion	AngioViz	x	x
19	CT Brain Perfusion	CT Perfusion 4D Multi-organs	x	x
20	CT Brain Perfusion	CT Perfusion 4D Neuro	x	x
21	CT COPD	Thoracic VCAR	x	x
22	CT Dental Planning	DentaScan	x	x
23	MR QFlow	Circle CVI Flow[3]	x	x
24	MR Cardiac Temporal Enhancement	Circle CVI Tissue Characterization[4]	x	x
25	MR Cardiac Temporal Enhancement	CardiacVX	x	x
26	MR Mobiview	BodyView	-	x
27	MR T2 Neuro Perfusion	BrainView	x	x
28	MR Fiber Trak	Only some part under BrainView	x	x
29	MR Diffusion	Only some part under BrainView	x	x
30	MR iViewBOLD	BrainWave	x	x

[3] 3rd party apps

[4] 3rd party apps

31	NM Astonish Reconstruction:*Processing Applications Suite	CardIQ Physio	x	x
32	NM Review	PET VCAR	x	x
33	NM NeuroQ Amyloid	Cortex ID Suite	x	x
34	NM JETPack Application Suite	Dynamic Vue	x	x
35	CT Cardiac Viewer, some portion of Comprehensive Cardiac Analysis (CCA)	CardIQ Xpress 2.0 Reveal	x	x
36	CT Liver Analysis	FlightPlan for Liver	x	x
37	CT Liver Analysis CT Liver Analysis	Hepatic VCAR	x	x

Competition Strength and Weaknesses/Counter Strike

Strength:

1. Smart Positioning:
    a. 24/7 Remote Customer Support as part of standard service pricing (common support teams across the entire Informatics Continuum). → DEFLECT[5] →Typically, Radiologists work in specified business hours (not 24x7) so this is more of a selling pitch by GE. Directly/Indirectly, the client has to pay for such services.
    b. Free enrollment to GE's exclusive e-Learning Content → DEFLECT → We provide KnowledgeScape, a workflow-driven learning tool.
    c. Aggressive pricing owing to 'bundled' deals + market-specific custom solutions
    d. Universal Viewer: Light footprint, single solution addressing PACS & Advanced Visualization
2. Strong focus on emerging markets & value-segment is strong. GE continues to be aggressive in its reach out to wider markets and far flung areas – riding strongly on their modalities business and offering deep discounts for bundled, enterprise-level deals.

Countering GE Healthcare:

1. Since GE's modality install base is high – we should highlight our multivendor capability and vendor neutrality to push our ISP solutions
2. Given GE's product architecture where not all applications are hosted on the Server – it at times, becomes challenging to access the applications outside the Radiology department
3. Leverage existing promotions. E.g.: 'Attach-more' promotion & Bundled Deals/Packages. Presently there is large scope for increasing this revenue (since our present attachment rates with DI and IGT are ~39% in International market)
4. RSNA 2015: GE's big buzz on Universal Viewer found no takers for it was lacking in features (they never got a right combination of PACS and AV feature set)
5. GE tends to be going overboard on technology / solution announcements at conferences and seminars (e.g. HIMSS, RSNA, etc.) – but does little to deliver on them. It seems that GE uses such events to do a dip-stick check on what really excites clients.

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

[5] DEFLECT: A 'so-called' area of strength of the competitor can be countered

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