2013 North American Radiology Informatics Company of the Year Award
Company of the Year Award
Radiology Informatics
North America, 2013

Frost & Sullivan’s Global Research Platform
Frost & Sullivan has over 50 years of business expertise, with a global research organization of over 2,000 analysts and consultants who monitor more than 300 industries and 250,000 companies. This unique position and visibility into the global marketplace enables us to determine how best-in-class companies worldwide manage growth, innovation and leadership. Based on the findings of this Best Practices research, Frost & Sullivan is proud to present the 2013 North American Company of the Year Award in Radiology Informatics to GE Healthcare.

Frost & Sullivan’s Best Practices Awards
Frost & Sullivan’s Best Practice Awards independently recognize companies in a variety of global and regional markets for demonstrating outstanding achievement and superior performance in areas such as visionary innovation, competitive strategy, leadership, technology, and product development. The Best Practices Awards underscore superior planning and execution of business processes including strategic alliances, mergers and acquisitions, distribution strategies, research and development, product launches, and customer service. Specific criteria for each Award category have been developed leveraging the global expertise of Frost & Sullivan analysts and consultants.

As an unbiased, third-party, Frost & Sullivan recognizes GE Healthcare for delivering excellence and best practices in their respective endeavors. The Company of the Year Award is backed by extensive analysis; companies identified, and the quality of their growth strategy, growth implementation, innovation, and leadership are monitored and evaluated through primary analyst research. This stringent methodology positions GE Healthcare as a superior market participant.

The companies that are commended as Best Practices Award recipients are those with the diligence, perseverance, and dedication required to develop a successful business plan and excel in the increasingly competitive global marketplace.

Understanding Frost & Sullivan’s Best Practices Research Process
Frost & Sullivan’s Awards are based entirely on the merit of the company, product, service, or technology being evaluated. The first phase of this stringent research process focuses on key challenges centric to a research area such as a market or
industry. Once these are determined, it is then possible to identify applicable measurements that address those challenges.

4 Step Process for Identifying Award Recipients

The next phase in the best practices research process is based on in-depth primary interviews with market participants. This information is then cross-referenced by interviewing others in the value chain (i.e. industry experts, distributors, opinion leaders, and end users). Finally, a third layer of validation is conducted to check the information given to the analyst team against secondary and public information sources including SEC filings, corporate/investor presentations, articles, and databases. This rigorous methodology allows our research and consulting teams to objectively analyze each company's performance regarding the key Award criteria, and determine the final Award recipient.
**Key Benchmarking Criteria for Company of the Year Award**

For the Company of the Year Award, the following criteria were used to benchmark GE Healthcare’s performance against key competitors:

- Growth Strategy Excellence
- Growth Implementation Excellence
- Degree of Innovation with Products and Technologies
- Leadership in Customer Value
- Leadership in Market Penetration

**Best Practice Award Analysis for GE Healthcare**

The Decision Support Matrix, below illustrates the relative importance of each criterion for the Company of the Year Award and the ratings for each company under evaluation. To remain unbiased while also protecting the interests of the other organizations reviewed, we have chosen to refer to the other key players as Competitor 1 and Competitor 2.

<table>
<thead>
<tr>
<th>Measurement of 1–10 (1 = lowest; 10 = highest)</th>
<th>Award Criteria</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Growth Strategy Excellence</td>
</tr>
<tr>
<td>Relative Weight (%)</td>
<td>20%</td>
</tr>
<tr>
<td>GE Healthcare</td>
<td>9.5</td>
</tr>
<tr>
<td>Competitor 1</td>
<td>9.0</td>
</tr>
<tr>
<td>Competitor 2</td>
<td>9.0</td>
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As demonstrated by Frost & Sullivan’s ongoing monitoring of and research into medical imaging informatics, GE Healthcare has remained the undisputed leader in the U.S. radiology informatics market for over a decade, both in terms of market revenue and installed base.
However, Frost & Sullivan research reveals that growing competition in the U.S. Picture Archiving and Communication Systems (PACS) market, notably from smaller competitors, coupled with the generalized slowdown in market growth and industry innovation over the last few years, had somewhat reduced GE Healthcare’s historic momentum in this market.

In Frost & Sullivan’s opinion, GE Healthcare is effectively reversing this slowing trend with their continued research and development investments over the course of 2011 and 2012 which bore fruit at the end of 2012 when the company launched two important new products, its Centricity Clinical Archive and Centricity PACS with Universal Viewer solution.

**Setting to Achieve Growth through Meaningful Innovation and Leveraging Company Strengths**

These products constitute an advancement of GE’s portfolio for radiology informatics that builds on GE Healthcare’s vast legacy of technology and clinical innovation, and encompass new functionality to help improve efficiencies and productivity in imaging. Indeed, GE Healthcare’s Centricity Clinical Archive solution\(^1\) extends the company’s pioneering efforts in the design of PACS-neutral enterprise image archives to application neutral architecture for multi-ology consolidation. While the Centricity PACS with Universal Viewer product puts clinical insight within reach to help clinicians streamline diagnosis and help improve result turnaround time.

\(^1\)Centricity Clinical Archive includes the following product components: Centricity Enterprise Archive, Centricity Enterprise Web - Patient Information View module, Centricity Enterprise Web, Caradigm eHIE, Centricity Clinical Gateway, NextGate MatchMetrix EMPI, PACSGEAR PacsSCAN™

In use for many years by hundreds of hospitals and hospital networks in the U.S., GE Healthcare’s vendor neutral archive effectively allows delivering a robust solution for imaging consolidation across enterprises and communities. Unlike vendor neutral archives that only support departmental DICOM consolidation, Centricity Clinical Archive unifies patient’s images and documents across the care continuum helping clinicians make more informed decisions with greater efficiency.

Owing to GE’s unwavering commitment to industry integration and interoperability efforts such as integrating the healthcare enterprise (IHE) and Health Level Seven (HL7), Centricity Clinical Archive ultimately helps providers lower cost and streamline enterprise-level and community-wide collaboration.

Additionally, Centricity PACS with Universal Viewer intuitively brings together 3D post-processing powered by AW, breast imaging tools, enhanced streaming performance, and patient history on an easy-to-use, unified reading desktop. A choice of web-based and zero footprint clients provides enterprise-wide access, allowing users to retrieve patient data from PACS, RIS, EMR, and HIS systems across a range of platforms.
GE’s Centricity PACS with Universal Viewer demonstrates the continued commitment to advancing imaging informatics. Included in Centricity PACS with Universal Viewer are several innovations that enhance productivity and efficiencies, like smart reading protocols, which help decrease exam setup time and have the potential to reduce the number of mouse clicks by 70%*.

*GE Global Research Center performed tests in multiple customer facilities of more than 100 CT and MR studies, showing 70% perfect hanging, 20% partially correct, and 10% exceptions. The observed number of mouse clicks for CT spine and upper extremity studies was reduced by 70%, from 36 to less than 10.

Frost & Sullivan firmly believes that the ability to meet such critical high-level objectives as increasing cost efficiency, access to images, streamlining viewing and workflow, and enhancing enterprise integration, through innovative technology, will be the key to vendor success going forward.

**Conclusion**

GE Healthcare’s upgraded solutionset is in perfect alignment with the evolving end user demands and various directions being taken on by imaging providers in the U.S. market today. Combining top quality service, high performance and technology innovation, GE Healthcare’s Centricity imaging solutions, in use by over 3,000 organizations, have a proven track record of allowing providers to lower cost of ownership today albeit while preparing for the challenges of the future. This upgraded value proposition exemplifies GE Healthcare’s renewed vision and focus on delivering innovative radiology informatics solutions as one way of helping providers transition to an integrated collaborative care model.

**About Frost & Sullivan**

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best-in-class positions in growth, innovation and leadership. The company’s Growth Partnership Service provides the CEO and the CEO’s Growth Team with disciplined research and best-practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from more than 40 offices on six continents. To join our Growth Partnership, please visit [http://www.frost.com](http://www.frost.com).

**About GE Healthcare IT**

GE Healthcare provides transformational medical technologies and services to meet the demand for increased access, enhanced quality and more affordable healthcare around the world. GE (NYSE: GE) works on things that matter - great people and technologies taking on tough challenges. From medical imaging, software & IT, patient monitoring and diagnostics to drug discovery, biopharmaceutical manufacturing technologies and performance improvement solutions, GE Healthcare helps medical professionals deliver great healthcare to their patients.