SIEMENS Healthineers

2025 COMPANY OF THE YEAR

Driving impact across the customer value chain

RECOGNIZED FOR BEST PRACTICES IN THE NORTH AMERICAN ADVANCED VISUALIZATION APPLICATIONS INDUSTRY

FROST & SULLIVAN

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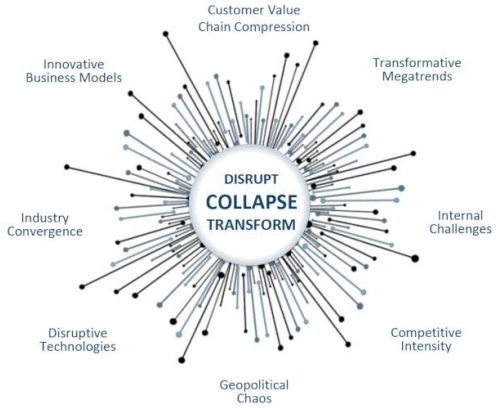
Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Siemens Healthineers excels in many of the criteria in the advanced visualization applications space.

RECOGNITION CRITERIA	
Visionary Innovation & Performance	*Customer Impact*
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Megatrends	Customer Purchase Experience
Leadership Focus	Customer Ownership Experience
Best Practices Implementation	Customer Service Experience
Financial Performance	Brand Equity

The Strategic Imperative 8: Factors Creating Pressure on Growth



- **Innovative Business Models**: A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning
- **Customer Value Chain Compression**: Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables the reduction of friction and the number of steps in customer journeys
- **Transformative Megatrends**: Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives
- **Disruptive Technologies:** New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate
- **Internal Challenges**: The internal organizational behaviors that prevent a company from making required changes

- **Competitive Intensity**: A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance
- **Geopolitical Chaos**: Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security
- **Industry Convergence**: Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

The Transformation of the Advanced Visualization Applications Industry

The North American advanced visualization (AV) applications market is undergoing a significant transformation as medical imaging becomes more complex and central to diagnostic care. The rising adoption of precision medicine has amplified the demand for tools that can deliver high-resolution, multi-modal imaging combined with real-time analysis. In this environment, artificial intelligence (AI) has shifted from a novel enhancement to a core requirement, helping clinicians process vast volumes of imaging data speedily and accurately. This transformation is also fueled by growing expectations for seamless interoperability with electronic health records and cloud-based collaboration tools that can support remote diagnostics and multidisciplinary care teams.

These technological shifts are occurring alongside major policy and reimbursement changes that increasingly reward value-based care. In this context, advanced visualization tools must do more than deliver clinical insights, they must integrate effortlessly into existing workflows, minimize disruptions, and support measurable patient outcome improvements. However, widespread adoption is still hindered by challenges such as complex integration processes, high implementation costs, and concerns over data privacy, particularly for smaller or rural facilities with limited information technology infrastructure.

To overcome these barriers, leading vendors are developing scalable, cloud-native platforms that embed AI and automation at the core. These solutions enable real-time imaging analytics, streamline clinical decision-making, and offer flexible deployment models that support both large hospital networks and smaller providers.

Within this landscape, Siemens Healthineers has emerged as a key innovator. Its Digital & Automation platforms exemplify a modern, integrated approach, offering AI-powered diagnostic tools, dynamic licensing based on procedural volume, and open architecture systems that enhance interoperability. By aligning cutting-edge visualization technology with clinical and operational needs, Siemens Healthineers is helping North American healthcare systems bridge the gap between innovation and real-world impact.

Building on this foundation, Siemens Healthineers' AV portfolio strengthens diagnostic precision and workflow efficiency across imaging specialties. Anchored by the *syngo.*via platform, these solutions provide multi-modality, multi-organ, and disease-specific applications for radiology, oncology, cardiology, and neurology.[1] *syngo.*via integrates seamlessly with Syngo Carbon, Siemens Healthineers' enterprise imaging platform, offering advanced 3D and 4D visualization, AI-powered segmentation, and quantitative

[1]https://www.siemens-healthineers.com/en-us/digital-health-solutions/syngovia Accessed April 2025

analysis tools that support faster, more accurate clinical decisions.[2] Additionally, Siemens Healthineers offers specialized AV applications for emerging technologies like photon-counting computed tomography and dual-energy imaging, enabling healthcare providers to extract richer, more actionable insights from complex imaging data. This comprehensive, interoperable AV ecosystem empowers clinicians to navigate increasingly sophisticated imaging demands while maintaining diagnostic consistency and operational flexibility.

Flexible, Transparent, and Aligned with Clinical Workflows

Siemens Healthineers addresses persistent clinical and operational gaps through a comprehensive development approach that unifies product design, service delivery, and customer engagement. By analyzing inefficiencies across radiology and diagnostics, the company creates tools that directly align with enterprise imaging and workflow priorities. For example, Syngo Carbon, an enterprise imaging platform, consolidates multi-modality, multi-specialty data into a single, vendor-neutral environment. This eliminates traditional data silos, enabling institutions to scale imaging capabilities and streamline reporting without infrastructure complexity.[3] It also gives providers access to Siemens Healthineers' expanding portfolio of advanced visualization, cloud services, and AI-powered tools. This approach creates a fully connected ecosystem that enables smooth data sharing and enhances the coordination of care across different platforms.

> *"Through structured execution, intelligent automation, and adaptive integration, Siemens Healthineers delivers a foundation for consistent performance across markets."*
>
> ***- Ana Victoria Dominguez***
> ***Best Practices Research Analyst***

Strategic foresight informs the company's innovation agenda, aligning technological development with emerging trends in automation, reimbursement policy, and clinical decentralization. Siemens Healthineers' offerings incorporate a structure that accommodates background automation, and intelligent workload prioritization, functions that reflect rising demands for speed, diagnostic precision, and resource optimization. The platform architecture allows institutions to test and adopt new tools through a low-friction model, supporting early experimentation across evolving areas such as photon-counting computed tomography and dual-energy imaging. This adaptability positions the company's offerings as a responsive foundation for care environments facing rapid digital transformation.

Unlike fragmented offerings that rely on external acquisitions, the company's platforms deliver enterprise imaging services through a unified, homegrown platform that consolidates collaboration, data continuity, and decision support. Its shared workspaces and multi-site imaging access strengthen coordination between radiologists, referring physicians, and specialists, ensuring that patient imaging histories are consistently available across the care continuum. Moreover, unified clinical decision support and structured reporting tools help standardize interpretations and support evidence-based diagnostics, reducing variability and enhancing quality. Additionally, Syngo Carbon's embedded data governance and

[2] https://www.siemens-healthineers.com/en-us/digital-health-solutions/syngo-carbon Accessed April 2025
[3] https://www.siemens-healthineers.com/en-us/digital-health-solutions/syngo-carbon. Accessed April 2025

audit capabilities provide healthcare systems with robust tools to manage regulatory, cybersecurity, and data privacy requirements while promoting operational transparency.[3]

The company's customer engagement model further solidifies its market position. Subscription models include continuous education, annual usage evaluations, and tailored onboarding for each deployment. Customers gain technical capabilities and structured support to optimize usage and accelerate value realization. Dedicated customer success managers track implementation progress and utilization trends, supporting institutions through change management and staff readiness. This embedded support strategy sustains long-term partnerships while fostering continuous alignment with clinical and operational objectives.

> *"By continuously translating real-world insights into high-performing solutions, Siemens Healthineers maintains its reputation as a preferred partner across global health systems."*
>
> ***- Anantharaman Viswanathan***
> ***Research Director***

In addition, training and adoption follow a structured onboarding plan adapted to each organization's structure and infrastructure. Built-in education ensures new users receive role-specific instructions, while annual training hours support ongoing staff development. By aligning implementation support with existing workflow patterns, Siemens Healthineers reduces the onboarding process time and improves long-term adherence, driving utilization efficiency and minimizing technical overhead. In this regard, operational transparency remains central to the company as its per-procedure pricing model aligns cost with clinical activity, giving full visibility into value and usage.

Through structured execution, intelligent automation, and adaptive integration, Siemens Healthineers delivers a foundation for consistent performance across markets. The company's ability to unify global development, local deployment, and clinical usability defines its approach to best-in-class healthcare delivery.

Driving Innovation and Efficiency in Healthcare Delivery

Delivering strong value across clinical, operational, and financial dimensions is central to Siemens Healthineers' strategy, ensuring that cutting-edge imaging capabilities remain accessible without compromising performance. Modular software architectures combined with intelligent automation streamline diagnostic workflows while keeping infrastructure costs under control. Flexible licensing frameworks, including subscription-based access to advanced imaging tools, enable providers to scale usage in line with patient volumes and departmental needs. This pricing model supports sustainable investment while giving institutions the agility to adopt new technologies without delay or disruption.

An intuitive user experience drives long-term engagement, with system interfaces and workflow tools designed to mirror real-world clinical behavior. Imaging teams operate within harmonized environments that reduce manual input, accelerate task completion, and enhance consistency across modalities. AI-powered decision support and embedded automation reduce operator variability and increase confidence in high-pressure settings. Role-based configurations further align the platform with clinical routines, supporting faster onboarding and ongoing efficiency without compromising precision.

Responsive service infrastructure supports uptime and system optimization at every stage of deployment. Field engineers and modality-specific support teams deliver high-impact interventions, while remote

diagnostics and software monitoring resolve performance issues before they affect clinical output. Predictive maintenance routines and automated system checks minimize service interruptions, reducing the need for on-site support and extending equipment longevity. This proactive model ensures operational continuity, even in high-demand care environments.

Brand leadership is reinforced by sustained product excellence and strategic partnerships with top-tier healthcare institutions. Through reference networks and co-development initiatives, Siemens Healthineers engages directly with clinical stakeholders to validate performance and shape new functionality. These long-standing collaborations enhance trust, accelerate innovation cycles, and anchor the brand in a culture of shared progress. By continuously translating real-world insights into high-performing solutions, Siemens Healthineers maintains its reputation as a preferred partner.

Conclusion

Siemens Healthineers stands out for its ability to bridge clinical, operational, and financial priorities, ensuring healthcare providers can deliver high-quality diagnostics without compromise. Its modular software architecture, intelligent automation, and flexible subscription models streamline workflows while maintaining cost efficiency. A seamless user experience, powered by artificial intelligence-driven decision support, enhances diagnostic accuracy and operational consistency. Proactive service infrastructure, including predictive maintenance and remote monitoring, maximizes uptime and system longevity. Long-term industry collaborations and customer-focused innovation further solidify its leadership, making the company a trusted partner in healthcare transformation.

With its strong overall performance, Siemens Healthineers earns Frost & Sullivan's 2025 North American Company of the Year Recognition in the advanced visualization applications industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging mega trends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

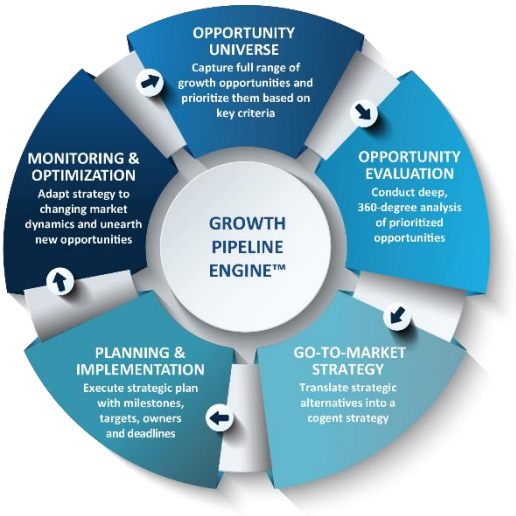
The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)