GE HealthCare

2025 TECHNOLOGY INNOVATION LEADER

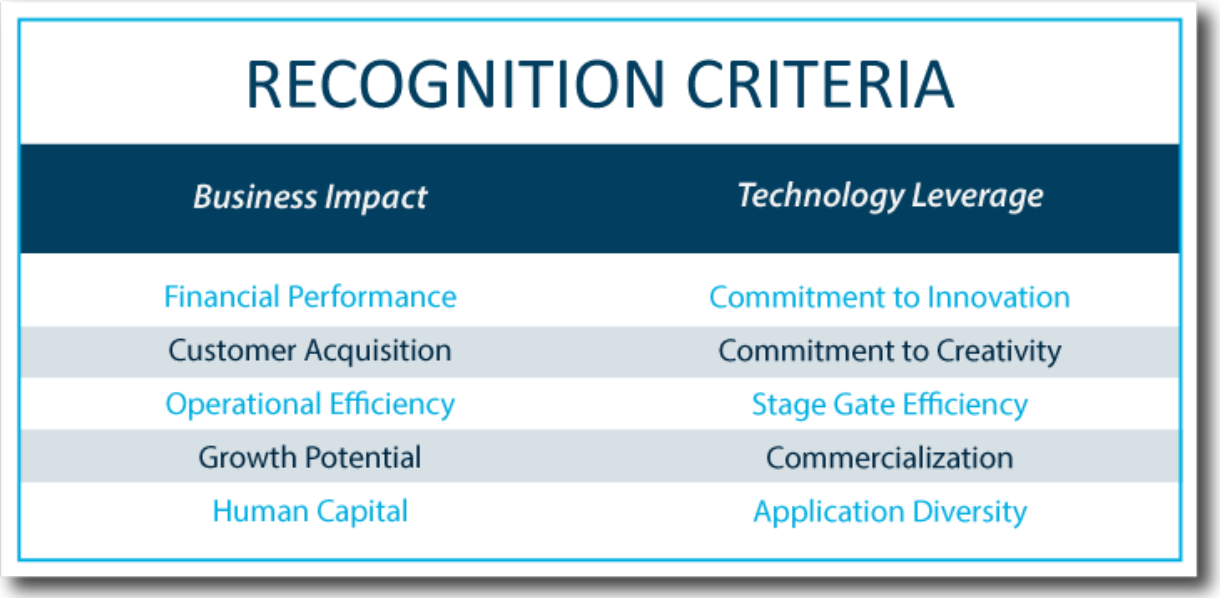
Enhancing Customer Impact Through Powerful Technology Integration

RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL CLINICAL AGENTIC AI PLATFORM INDUSTRY

FROST & SULLIVAN

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. GE Healthcare excels in many of the criteria in the global clinical agentic AI platform space.



Healthcare at a Turning Point in Digital Transformation

The healthcare sector has reached a critical stage in its digital evolution, particularly in the adoption of artificial intelligence (AI), cloud computing, and software-as-a-service (SaaS) infrastructure. Although healthcare systems remain in the early phases of AI and cloud adoption, market forecasts indicate a rapid acceleration. Frost & Sullivan forecasts that generative AI will deliver $94.5 billion in savings for payer and provider IT systems in 2024, with that figure rising to $345.9 billion by 2029.[1] This projection captures only part of the opportunity, as the greater potential lies in AI's ability to reduce labor costs (which represent the largest expense across healthcare systems). By 2029, generative AI will drive $249.25 billion in savings in provider information technology (IT) systems and $81.28 billion in payer IT systems, with both segments showing strong growth through the decade.[1]

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>
> ***- Manuel Albornoz***
> ***Best Practices Research Analyst***

[1] Generative AI in Payer and Provider IT Transformation, Global, 2024–2029 (Frost & Sullivan, November 2024).

In response to this shift, GE HealthCare pursues a comprehensive technology strategy grounded in its D3 approach, which focuses on integrating AI in three key areas: in the device, in the disease state or care journey, and across the digital healthcare enterprise. The company positions clinical agentic AI as a key driver of smarter devices, enhanced clinical decision-making, and improved enterprise performance. As of 2025, the company leads the industry with more than 100 Food and Drug Administration (FDA) authorizations for AI-enabled medical device applications and plans to increase that number to over 200 by 2028.[3] In addition, GE HealthCare has expanded its AI and cloud workforce more than sixfold in 18 months, enabling faster development cycles and creating recurring revenue through cloud-native, software-based solutions.[2]

This strategy reflects a direct response to evolving customer needs and a broader ambition to lead healthcare's digital transformation. GE HealthCare recognizes that many providers have not yet adopted cloud infrastructure; however, the company continues to develop solutions in anticipation of this growing future demand. Its foundation model-driven AI architecture supports faster innovation, while strategic initiatives with Amazon Web Services (AWS) and NVIDIA enhance its ability to scale cloud-first platforms. With digital revenue already exceeding $1.2 billion and a near-term goal to grow by 50%, GE HealthCare aims to shape the next era of intelligent healthcare delivery.[3]

Transforming Devices, Care Pathways, and Enterprise Operations

GE HealthCare anchors its AI strategy in its D3 framework, which targets three core areas of transformation across the continuum of care: within medical devices, across the patient care journey, and throughout the healthcare enterprise. This approach is aimed at equipping clinicians with intelligent tools, delivering insights across specialties, and strengthening the operational foundation of health systems. Each pillar contributes to the company's broader goal to build a connected, AI-powered health ecosystem.

AI in the Device: Smarter Imaging and Real-Time Support

GE HealthCare integrates foundation models into its imaging devices to speed up scan times, improve image quality, and reduce pressure on radiologists and technicians:

- **AIR Recon DL** accelerates magnetic resonance imaging (MRI) scans by up to 50% while maintaining or enhancing image quality.[4] This technology supports over 34 million scans to date, generating measurable value in clinical settings.[5]
- **Sonic DL** reduces scan times by up to 83%, illustrating GE HealthCare's focus on delivering faster diagnostics without compromising accuracy.[6]
- **Precision DL** enhances sensitivity by detecting small, low-contrast lesions that traditional tools often miss.

[2] Ibid.
[3] Ibid.
[4] "MR image reconstruction with AIR™ Recon DL" (GE HealthCare website: https://www.gehealthcare.com/products/magnetic-resonance-imaging/air-recon-dl?srsltid=AfmBOoriLT4Tk2UgJZDJmwmSq9iuH6Z2uU49OZrCxbJ3FDCx4U-oU3Ze)
[5] Ibid.
[6] "Life-speed imaging with Sonic DL" (GE HealthCare website: https://www.gehealthcare.com/products/magnetic-resonance-imaging/sonic-dl-deep-learning-mri-acceleration?srsltid=AfmBOopVjCn-6eHrp9Y2OsXK2smV9Nmi6_ZohNkva-eiSt0Yr0oRCuZV)

- **Organ Segmentation** uses AI to reduce image processing time from hours to minutes, enabling faster identification of at-risk organs.
- **Caption Guidance** provides ultrasound guidance and brings high-quality imaging to non-specialists using portable tools like the Vscan Air. This innovation reflects the company's belief that point-of-care imaging and cloud-based data sharing together create a new frontier in accessible care.

  These advancements leverage advanced AI architectures that enhance speed and consistency in the imaging workflow. GE HealthCare's emphasis on AI-native technologies in its product development pipeline demonstrates its commitment to supporting clinician productivity and data interoperability through the use of AI.

AI Across the Patient Journey: Faster Insights with CareIntellect

The **CareIntellect** suite represents GE HealthCare's most ambitious effort to centralize and act on clinical data across specialties. Built on a shared cloud infrastructure and powered by multi-modal foundation models, the CareIntellect family of applications is designed to integrate data from imaging, waveforms, clinical notes, genomic sequencing, and other structured and unstructured sources. Announced in 2024, CareIntellect for Oncology is a cloud-first application designed to leverage generative AI to analyze complex clinical data, summarize patient histories, and match patients to appropriate clinical trials.

Notably, Tampa General Hospital and UT Southwestern Medical Center are early evaluators of GE HealthCare's CareIntellect for Oncology application, with integration efforts already underway.[10] The objective of CareIntellect for Oncology is to make what once required months of coordination and customization ~~can~~ become possible in a fraction of the time, enabled by the product's modular design and unified data infrastructure.

The CareIntellect roadmap includes future modules in cardiology, neurology, and maternal-fetal care. Each module leverages the same underlying infrastructure, allowing providers to scale without facing repeated implementation cycles. By converting complex data into focused, clinically relevant insights, CareIntellect aims to improve patient intake, speed diagnosis, and support more personalized care planning.

AI Across the Enterprise: Scalable Operational Intelligence

GE HealthCare aims to bring AI into hospital operations through its **Command Center** platform. This solution is designed to help providers optimize patient flow, anticipate capacity challenges, and address operational issues in real time. Leading institutions such as Tampa General, Deaconess Health, and Humber River Health have already adopted the Command Center to improve performance.[11] At Tampa General alone, the platform helped eliminate inefficiencies totaling $40 million in savings, while across the broader user base, it has enabled thousands of additional patient visits annually.[12] GE HealthCare will soon bring its Command Center capabilities into the CareIntellect ecosystem with CareIntellect for Operations, designed to deliver AI-powered tools for patient management, resource planning, and customizable dashboards that support clinical and administrative teams.

GE HealthCare is also advancing **Project Health Companion**, an unreleased and experimental AI platform designed to process trillions of data points through advanced learning agents. The system is meant to be

designed to deliver adaptive insights, real-time alerts, and personalized recommendations to support clinical decision-making. While still in development, this initiative reinforces the company's commitment to building responsible, transparent AI that meets the demands of complex care environments.

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Overcoming Barriers to Scalable and Trusted AI Adoption

Bringing clinical AI into healthcare environments involves more than technological innovation; it requires solving challenges related to data interoperability, clinician adoption, and regulatory oversight. Each of these issues carries implications for safety, trust, and scalability. Within this context, GE HealthCare embeds structural solutions across its D3 strategy to ensure responsible and reliable AI deployment.

Frost & Sullivan stresses that one of the most pressing challenges involves integrating with existing hospital IT systems, particularly electronic health records and electronic medical records. As variability in data formats and standards makes data exchange quite difficult, GE HealthCare develops standardized interfaces and applies custom data mapping strategies tailored to each provider's infrastructure. This approach is meant to ensure that AI solutions receive accurate inputs, enabling consistent clinical decision support.

Clinician adoption presents another key hurdle. Many providers approach AI with concerns about workflow disruption or added complexity. Therefore, GE HealthCare aims to embed AI capabilities directly into existing clinical routines. Its applications automate documentation, summarize patient information, and surface key insights without requiring changes to established processes. Furthermore, to ensure long-term performance, the company plans to introduce an AI operations layer that tracks outcomes, collects clinician feedback, and adjusts models dynamically over time.

Regulatory oversight also adds complexity to the deployment of clinical AI. This technology can involve multiple autonomous components that must meet high standards for validation, patient privacy, transparency, and explainability. To address this scenario, GE HealthCare ensures that each AI-powered workflow includes structured validation, built-in safety checks, and documented decision logic. Human clinicians will remain essential to the workflow and must review all critical recommendations before they inform patient care. The company also maintains detailed system behavior records and aligns development with applicable regional regulatory frameworks, including those from the FDA, Conformité Européenne, and the Medical Device Regulation.

Clinicians face growing pressure to manage complex medical cases across fragmented systems. In high-demand specialties such as oncology, radiology, and surgery, providers must interpret vast volumes of multimodal data under tight time constraints. GE HealthCare addresses this challenge by developing ways of synthesizing information, streamlining decision-making, and automating routine tasks. The CareIntellect suite, for example, is designed to integrate data from radiology scans, pathology reports, lab results, clinical notes, and vital signs into a single, cohesive view. In the oncology care pathway, it brings

together MRI findings, biopsy results, and patient history to generate a real-time summary that supports faster, more informed clinical decisions.

Complex cases often demand close collaboration across clinical specialties. GE HealthCare seeks to support this need, with plans to develop and deploy agentic AI technology, leveraging specialized AI agents for each domain, including radiology, pathology, and surgery. Each agent will analyze its respective data stream and feed insights into a central orchestration layer. This coordinated system is meant to identify correlations, flag potential concerns, and recommend next steps based on clinical context. For example, during a surgical procedure, one agent may track real-time vital signs while another compares lab results against historical patterns to help guide intraoperative decisions.

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>
> ***- Nitin Manocha***
> ***Senior Industry Analyst***

In addition to clinical interpretation, healthcare providers face increasing administrative burdens that limit time for patient care. GE HealthCare is prioritizing automation of routine tasks such as report drafting, form completion, and follow-up scheduling. For instance, in oncology, the CareIntellect platform is being designed to automate the ordering and confirmation of all required pre-treatment tests, helping care teams stay on track and reduce manual workload.

As healthcare systems confront growing complexity and workforce shortages, GE HealthCare's product development leveraging foundation models and agentic AI is aimed at helping bridge the gap between demand and capacity while raising the standard of care.

Envisioned to Work Like Clinicians: Distributed, Collaborative, and Context-Aware

Frost & Sullivan appreciates the way that GE HealthCare's vision for Clinical Agentic AI is designed to stand out by properly reflecting the way clinical teams operate: distributed, collaborative, and context-aware. Unlike traditional AI tools that focus on isolated tasks, these applications will integrate a coordinated network of domain-specific agents, multimodal foundation models, and scalable cloud infrastructure to support care delivery across the continuum.

GE envisions the system to work this way: an orchestrator manages a team of specialized AI agents. Each agent performs a defined clinical function, powered by a model trained for that specific domain. The orchestrator assigns and sequences these tasks based on the clinical scenario. This design mirrors the multidisciplinary structure of modern care teams and generates insights that are more comprehensive and contextually aligned than single-model systems. The orchestrator will apply built-in guardrails and human oversight. Logic layers evaluate the output reliability, determine when to escalate findings for clinical review, and ensure that each recommendation follows a structured and transparent process. The system recognizes when to act, when to defer, and when to pause, an essential capability in clinical environments.

A key differentiator of GE HealthCare's vision for Clinical Agentic AI will be its ability to process and correlate multimodal healthcare data in real time. It integrates structured inputs such as lab results, unstructured text from clinical notes, waveform data from patient monitors, and imaging from diagnostic scans. By analyzing these diverse data sources in parallel, the system can identify connections that might otherwise be missed. For example, in a lung cancer case, a language model agent may detect a reference to a suspicious mass in a radiology report, while a vision model agent independently flags a lesion on a computed tomography scan. The orchestrator combines these findings into a single, actionable clinical insight, providing a more complete and timely view of the patient's condition.

GE HealthCare's suite of CareIntellect applications is designed to operate on a secure, multi-tenant cloud infrastructure that delivers the computing power required to run advanced AI models, manage large data volumes, and support concurrent deployments across health systems. This foundation is designed to enable centralized updates, allowing enhancements such as new models, clinical protocol updates, or performance optimizations to reach all users instantly. Smaller hospitals stand to gain immediate access to sophisticated capabilities without needing to manage complex infrastructure. In contrast, larger systems are poised to benefit from consistent performance, streamlined compliance, and unified governance across their networks.

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Expanding Impact Across Clinical Settings

GE HealthCare is actively validating its AI-enabled hospital operation center application across diverse care settings, where early use is helping shape its broader clinical potential. Clinicians and administrators continue to deliver strong, positive feedback on GE HealthCare's AI-powered technologies, reporting measurable improvements in accuracy, decision speed, and team coordination. Validation teams confirm the application's performance across healthcare settings. Overall, the system integrates smoothly into existing workflows and delivers real-time results. Providers regularly highlight the software's ability to accelerate time to insight and reduce the burden of complex, data-intensive tasks.

Whether reducing MRI scan times, matching cancer patients to trials, or increasing inpatient capacity without building new facilities, GE HealthCare consistently proves value before scaling.

At Deaconess Health System, AI-driven insights improved capacity utilization and enabled care for 2,000 additional patients each year.[7] Humber River Health in Toronto reduced the average length of stay and unlocked the equivalent of 35 additional beds by implementing the Command Center.[8] Looking ahead, GE HealthCare is expanding its roadmap to include AI-driven patient placement tools that anticipate staffing constraints and suggest actions to prevent operational bottlenecks.

[7] "Case Study: Deaconess Health System Increases Regional Access to Care" (GE Healthcare website: https://www.gehccommandcenter.com/articles/case-study-deaconess-health-system-increases-regional-access-to-care?utm)
[8] "Humber River Command Centre Improves the Quality and Speed of Patient Care" (GE Healthcare website: https://www.gehccommandcenter.com/outcomes/humber-river-command-centre-improves-the-quality-and-speed-of-patient-care?utm)

By combining technical innovation with strategic focus and a clear return on investment, the company positions AI as a foundational tool for the future of care delivery.

Driving Adoption through Safety, Transparency, and Trust

GE HealthCare approaches clinical AI development with a clear commitment to safety, transparency, and reliability. Rather than positioning AI as a replacement for clinicians, the company designs its technology as a supportive tool. A vital component of this approach is the company's Responsible AI governance framework, bringing together experts in clinical science, data science, legal, and regulatory affairs. These teams take care to build AI models on traceable data pipelines, follow international best practices such as the National Institute of Standards and Technology AI Risk Management Framework and the European Union AI Act, and require solutions to pass rigorous testing before release.

Altogether, the company follows seven guiding principles that shape its AI development[9]:

- **Safety:** Every system must avoid unintended outcomes or harmful applications and align with environmental and social sustainability goals.
- **Validity and Reliability:** Models must deliver consistent performance under real-world clinical conditions and stay within defined parameters.
- **Security and Resilience:** All systems are designed to withstand cyber threats, unauthorized access, and operational disruptions.
- **Accountability and Transparency:** Each model follows a defined governance structure and will include documentation that supports regulatory review and clinician trust.
- **Explainability and Interpretability:** Clinicians must be able to understand how AI systems reach conclusions, enabling meaningful oversight.
- **Privacy-Enhanced Design:** AI systems include strong data controls that protect patient confidentiality and respect autonomy.
- **Fairness with Harmful Bias Managed:** The company trains all models on diverse datasets to reduce bias and expand equitable access to care.

Industry experts guide every stage of development. They label training data, design agentic workflows, and evaluate outputs to ensure clinical relevance and accuracy. Before scaling any model, GE HealthCare runs a multi-tier validation process. The team starts with internal testing using curated datasets that include diverse cases. They then move the system into simulation environments built on real clinical data to test performance under dynamic conditions. After meeting applicable benchmarks, the company launches pilot programs in live care settings, where clinicians supervise the AI and track its performance. GE HealthCare uses insights from these pilots to refine each solution before expanding deployment.

[9] "Responsible AI in Healthcare: From theory to practice" (GE Healthcare website: https://www.gehealthcare.com/insights/article/responsible-ai-in-healthcare-from-theory-to-practice?srsltid=AfmBOor8Aozydc_AseIEZKSqNbebVNgDn1iK0U03KGar4QCJWvcb16c3)

For foundation models and other advanced tools, the company defines clear intended use cases early in development. This approach reduces the risk of misuse and ensures alignment with regulatory standards. Each model includes thorough documentation covering data sources, decision logic, and system behavior.

After validation, GE HealthCare deploys its solution through a secure cloud-based infrastructure. During the rollout of AI-enabled solutions, the company provides hands-on training for clinical and IT teams to support smooth adoption.

By combining expert oversight with structured validation and continuous improvement, the company seeks to ensure that each AI solution meets the demands of modern healthcare without compromising safety or performance.

Accelerating the Shift to Cloud-based, Software-driven Healthcare

GE HealthCare is transforming its commercial strategy to lead the healthcare industry's shift toward software-defined, cloud-native delivery. At the core of this transformation is a phased go-to-market roadmap. GE HealthCare launched its first SaaS delivery organization in 2024 and plans to scale to more than 40 SaaS offerings by 2028.[18] This evolution responds to a clear and growing need: healthcare generates approximately 32% of the world's data, yet nearly 92% of that information remains unused.[10] GE HealthCare is building the infrastructure to convert this underutilized resource into actionable intelligence through its data fabric and foundation model architecture.

Central to GE HealthCare's cloud-first strategy is the CareIntellect suite of applications. Each product is planned to run on a unified infrastructure designed to deliver a consistent, modular, and scalable customer experience. SaaS products built on GE HealthCare's CareIntellect ecosystem are designed to deploy quickly, update remotely, and scale without the complexity of legacy system integration. Strategic initiatives with technology leaders such as AWS and NVIDIA strengthen this delivery model by providing high-performance computer environments, built-in security, and access to the latest tools for AI development.[11]

The go-to-market approach aligns with the broader direction of the healthcare sector. Providers increasingly seek intelligent systems that support automation, interoperability, and adaptability. GE HealthCare meets this demand while building the infrastructure required to power the next generation of data-driven health systems.

[10] Ibid.
[11] Ibid.

Conclusion

Frost & Sullivan applauds the way that GE HealthCare is transforming the future of care delivery through clinically grounded, artificial intelligence (AI)-enabled innovation. By uniting domain expertise with a robust vision for an agentic AI ecosystem, the company aims to deliver scalable solutions that improve outcomes, streamline operations, and relieve pressure on clinical teams. This strategy reflects a strong commitment to safety, trust, and long-term impact. With a clear roadmap, proven customer adoption, and a cloud-first delivery model already in place, GE HealthCare is not just responding to industry change. It is building the infrastructure that health systems need to succeed in a data-driven, intelligence-powered future.

With its strong overall performance, GE HealthCare earns the 2025 Frost & Sullivan global Technology Innovation Leadership Recognition.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Leadership 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 Technology Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

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)