

# SIEMENS Healthineers

A graphic consisting of a cluster of orange dots of varying sizes, arranged in a roughly circular pattern, positioned to the right of the word 'Healthineers'.

RSNA 2016  
Media Breakfast

# Disclaimer

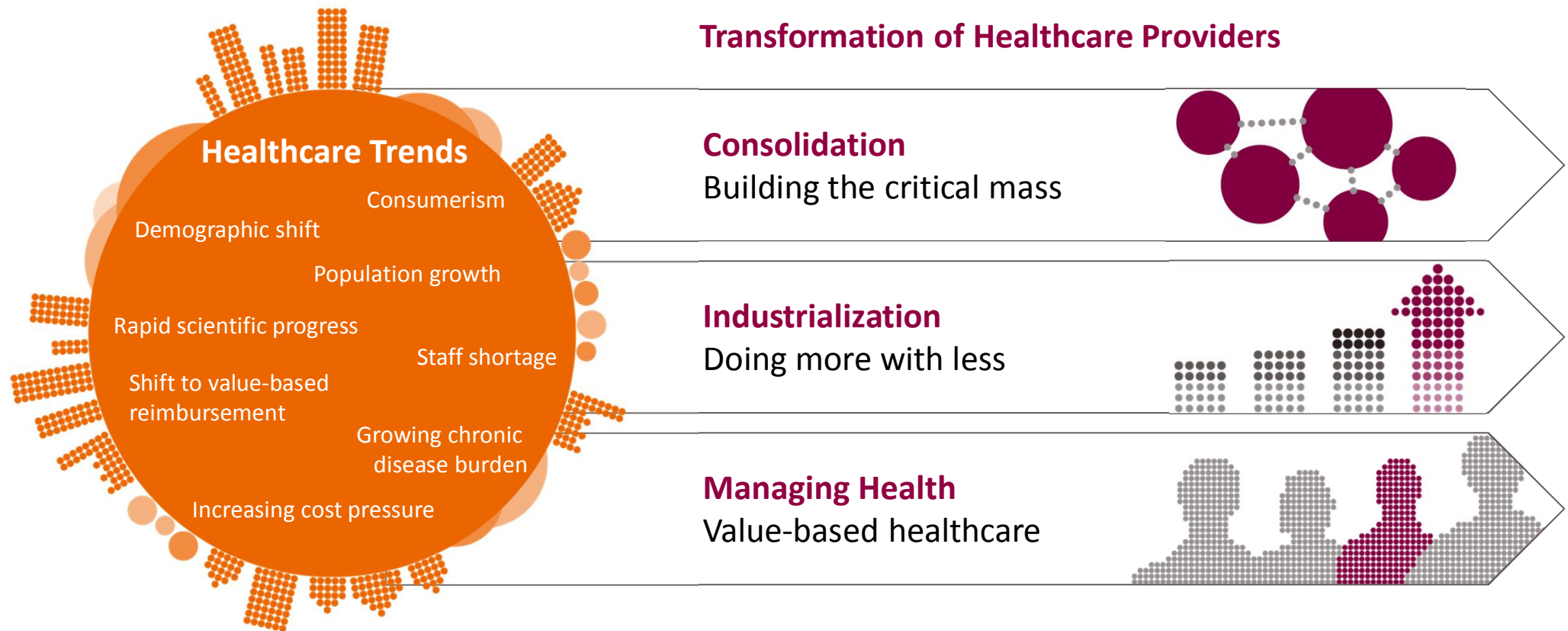
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# Global Dynamics in Healthcare



# Providers today need suppliers / partners that understand C-level challenges and address broad issues

## Race for Relevance

### Healthcare 20 years ago

#### Single Hospital

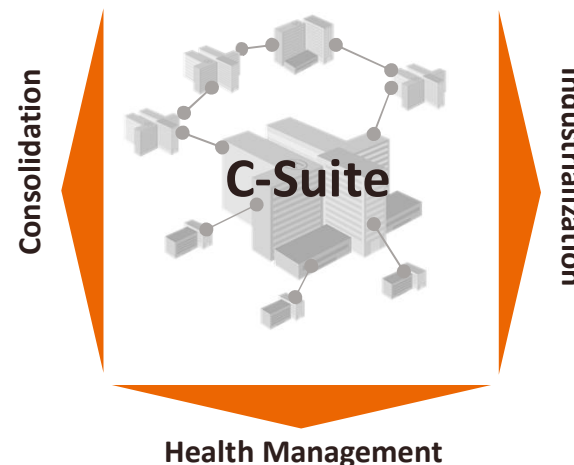
Emergency	OR
Outpatient	Orthopedics
OB-GYN	Cardiology
Oncology	Rehab
Radiology	Laboratory

- Department / specialty focus
- Clinicians drive purchase decisions
- Length of stay not a large concern
- Volume-based incentives

**How to win:** Most innovative technologies on a department level

### Healthcare today

#### Multi-hospital provider systems

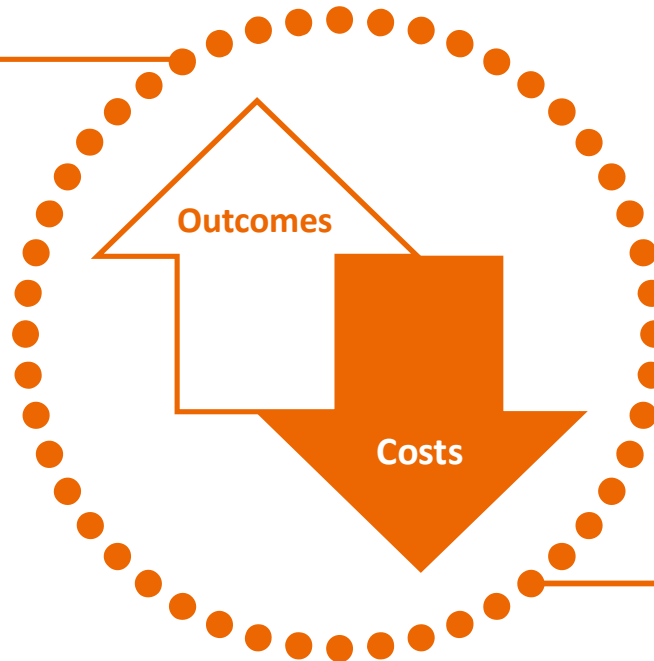


- System-wide focus
- Typical challenges: Minimize length of stay, reduce re-admissions, ...
- Team-based care
- Quality / outcome-based performance incentives

**How to win:** Ability to solve system-wide challenges with relevance for C-suite

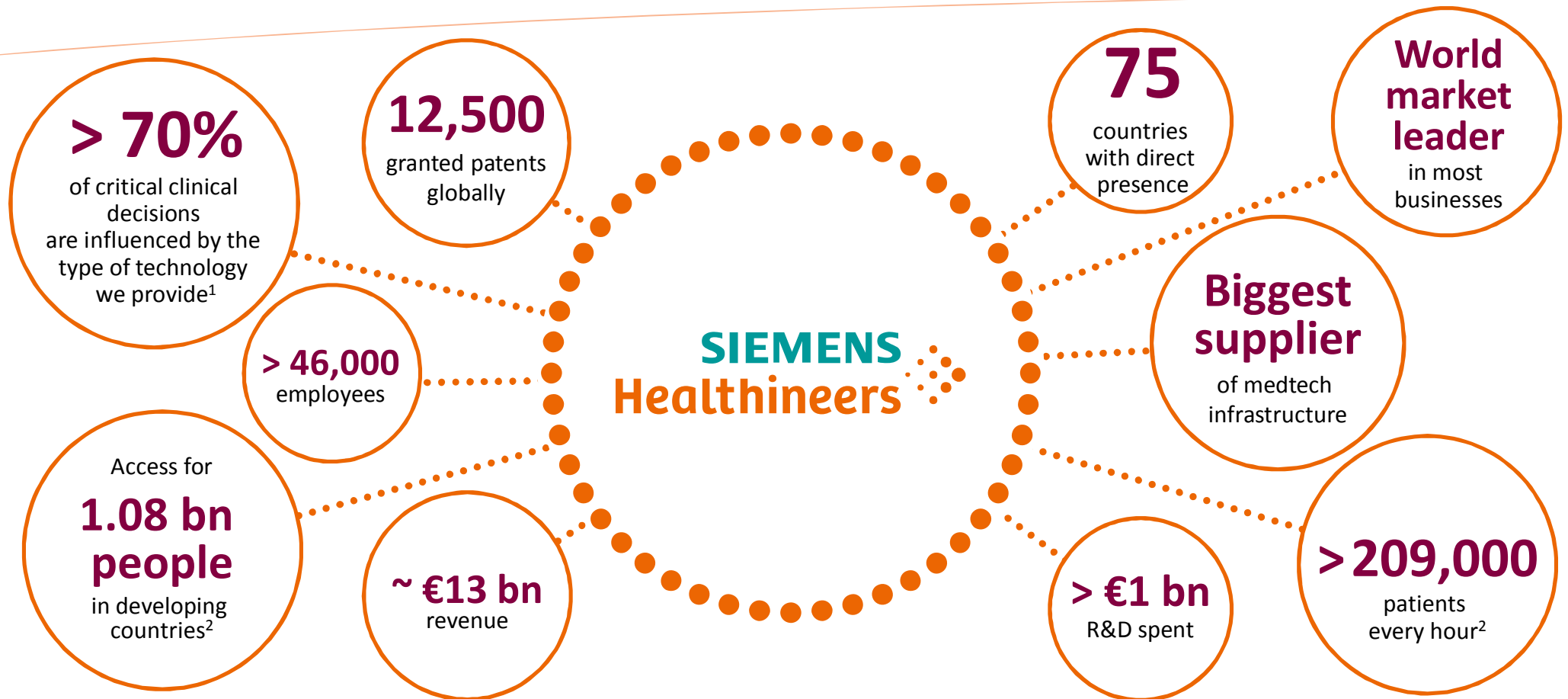
# Our Purpose is to Make Healthcare Providers Succeed

Enabling  
better outcomes



at  
lower costs

# Who We Are

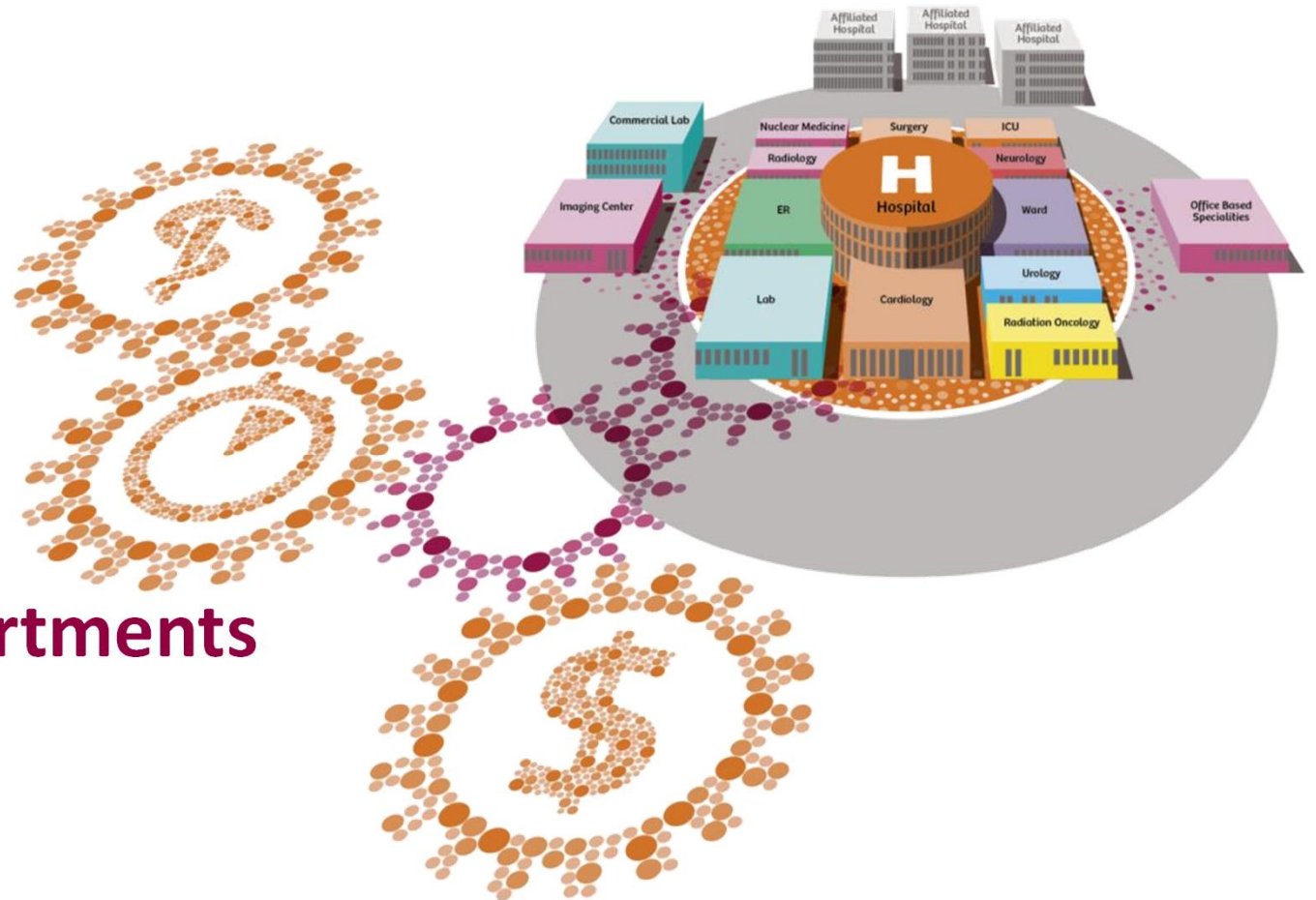


1 AdvaMedDX, "A Policy Primer on Diagnostics", June 2011, page 3

2 Siemens AG, "Sustainable healthcare strategy - Indicators in fiscal 2014", page 3-4

# Engineering Success

Innovations  
Transforming Departments



# Our Innovations - 120 Years Track Record



**1901**  
Nobel prize winners (Physics + Medicine)

**1896**  
Industrially manufactured X-ray appliance for medical diagnostics

**1956**  
CLINISTIX – dry chemistry testing for glucose in urine

**1957**  
Fully automated discrete chemistry analyzer for whole blood or serum

**1967**  
First real-time ultrasound scanner

**1975**  
First Siemens CT scanner

**1982**  
First acridinium ester based chemiluminescence immunoassays

**1983**  
First Siemens MRI scanner

**1998**  
First Siemens track-based laboratory automation system

**1999**  
First intuitive medical IT platform from Siemens

**2001**  
First PET/CT system from Siemens

**2005**  
First Dual Source CT scanner

**2006**  
Diagnostic analyzer integrating four technologies in one system

**2008**  
Robotic-assisted angiography system

**2008**  
Digital radiography, wireless flat panel detector

**2009**  
Multi-modality 3D imaging network

**2011**  
First integrated, simultaneous whole-body MRI and PET

**2015**  
Wide-angle image acquisition breast tomosynthesis

**2014**  
teampay

**2014**  
“Free breathing” CT scanning with dual X-ray sources & detectors

**2012**  
Wireless transducers for ultrasound

**2016**  
Liquid biopsy

**2015**  
First Twin Robotic X-ray scanner for enhanced patient care and productivity

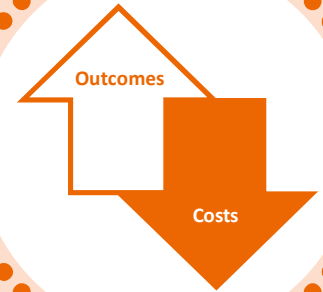
**2016**  
Atellica<sup>1</sup>

Enterprise Services

Advanced Therapies

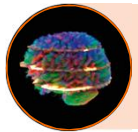
Molecular Diagnostics

Digital Health Services



Future

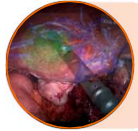
# Engineering Success – With Broadest and Deepest Portfolio



## Diagnostic Imaging

Computed Tomography, Magnetic Resonance, Molecular Imaging, Radiography & Fluoroscopy, Imaging IT

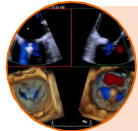
**Undisputed market leader  
in diagnostic imaging**



## Advanced Therapies

Cardiology, Interventional Radiology, Radiation Oncology, Surgery

**Empowering innovative  
therapy concepts**



## Ultrasound

Cardiology, Radiology

**Versatility and functionality  
across clinical questions**



## Laboratory Diagnostics

Immunoassay, Chemistry, Hematology, Hemostasis, Specialty Testing, Automation, IT and Services, Molecular Diagnostics

**Delivering clinical and  
workflow excellence**



## Point of Care

Blood Gas, Diabetes Urinalysis, Coagulation, Cardiology

**Lab-accurate, actionable,  
timely results at the point of care**



## Services

System Services, Education, Enterprise Services, Digital Services

**Transformative services to maximize  
opportunities and minimize risks**

**We support  
to raise ...**



**clinical  
excellence**



**operational  
efficiency**



**financial  
profitability**

# Innovations Transforming Departments



**Diagnostic confidence  
at the point of care**



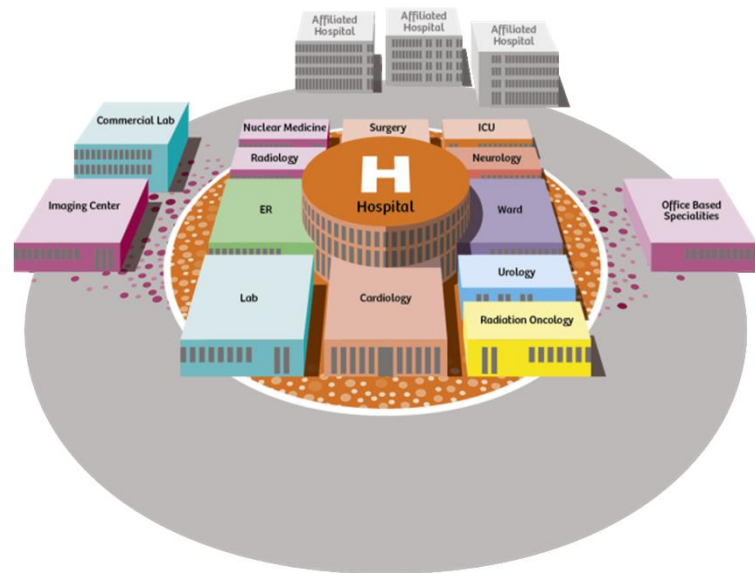
**Highest diagnostic  
quality and efficiency**



**Fast triaging**



**Clinical and workflow  
excellence in the lab**



**Efficient monitoring  
of chronic diseases**



**Customized care for  
specific patients &  
disease**



**Safe and effective  
min. invasive therapies**



**Precise state-of-the-art  
radiation therapy**

# Atellica Solution – Game Changer in In-Vitro-Diagnostics

- Engineered based on our **customers' needs** and extensive **research of market trends**
- Game changing solution delivering **control** and **simplicity** for driving **better business and clinical outcomes**
- Patented, **bi-directional magnetic sample transport technology** is **10 times faster** than conventional conveyors<sup>1)</sup>
- **Immunoassay analyzer** delivers the **industry's highest productivity per square meter<sup>2)</sup>** — more than **400 tests per hour**

1) System under FDA review. Not available for sale. Any features listed are part of the development design goals. Future availability cannot be guaranteed. 2) Versus leading IVD market competitors



# Artis pheno – Innovative Robot-supported Angiography System for Minimal Invasive Surgery

- Enabling personalized, minimally invasive surgery for **multimorbid patients** to account for the **changing disease pattern**
- Developed for use in **minimally invasive surgery, interventional radiology and interventional cardiology**
- **Versatile software applications** make even **challenging examinations** easier



ARTIS pheno is pending 510(k) clearance, and is not yet commercially available in the United States or in other countries. Due to regulatory reasons, its future availability cannot be guaranteed.

# Acquisitions to Strengthen Growth Areas and Broaden IVD Portfolio



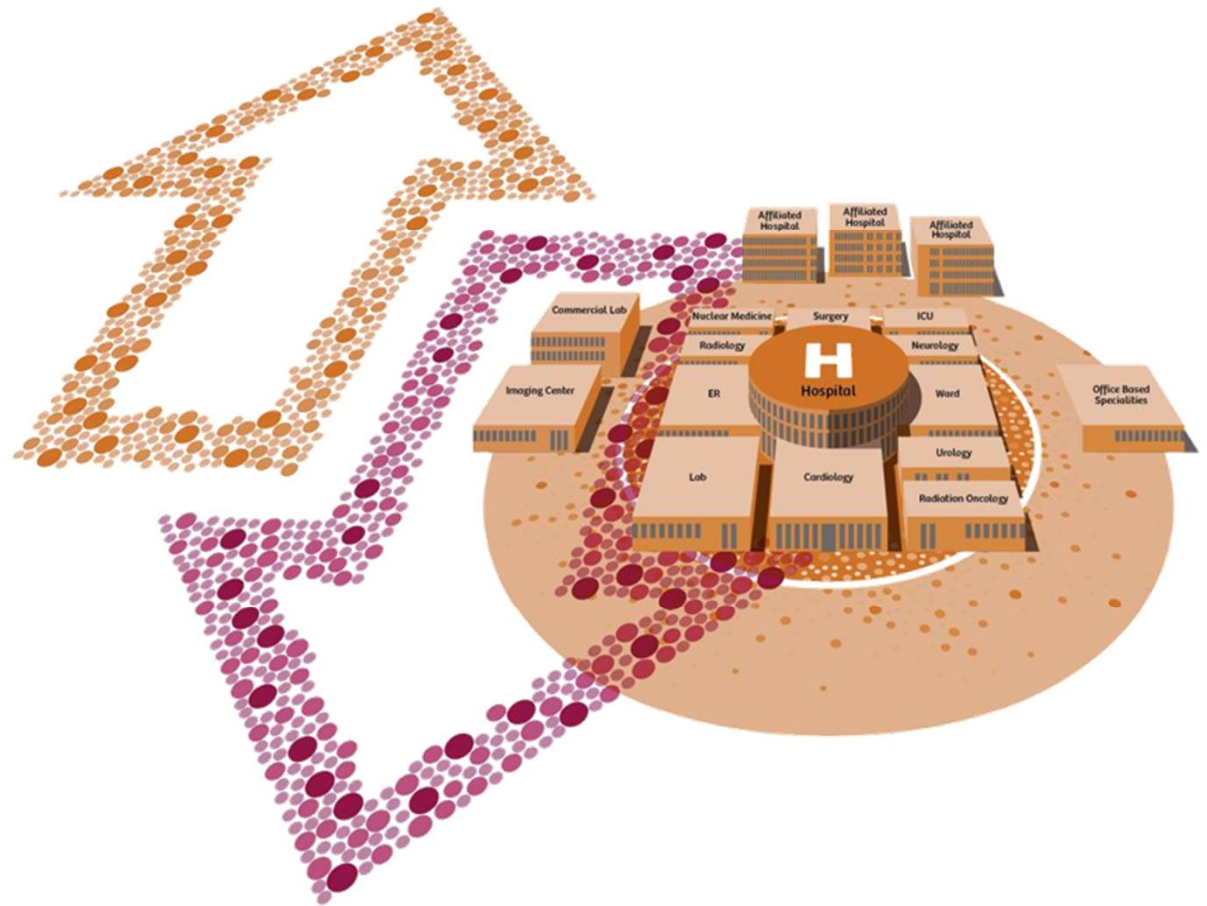
- Expansion of Diagnostics and Molecular Services Portfolio with molecular testing related services and technologies for oncology and genomics
- Entry point into NGS-based genomic testing and expanding capabilities in precision medicine and companion diagnostics



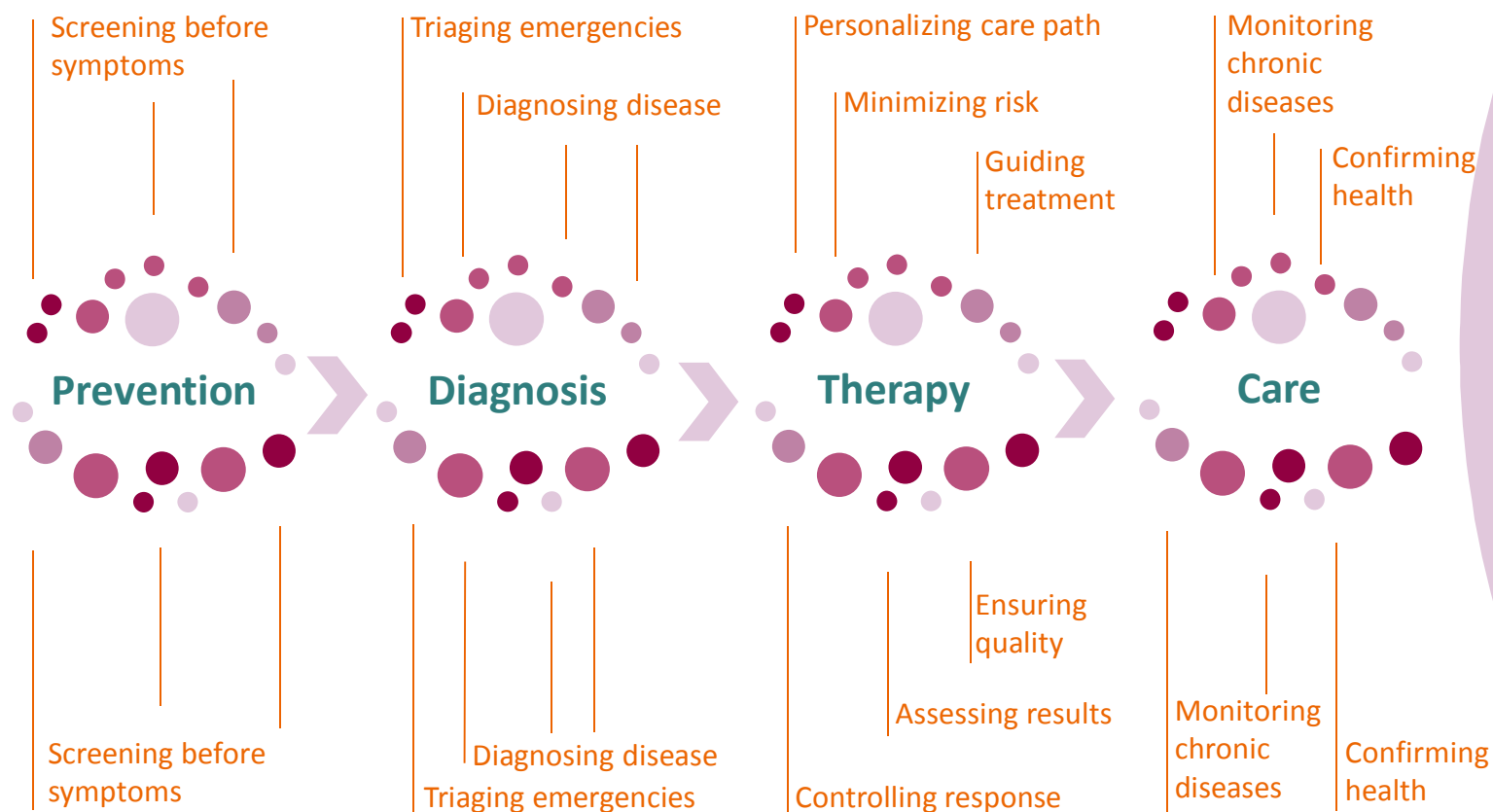
- Consolidation trend in healthcare , resulting in emerging healthcare networks ask for seamless integration of hundreds of decentralized devices that are spread across dozens of sites
- Common point-of care informatics portfolio delivers open connectivity offerings, enabling seamless data integration from any manufacturer's point-of-care analyzer—managed by a single informatics solution to streamline operations and access to data

# Pioneering Healthcare

Services Transforming  
Systems



# Our Technology – The Nervous System for Healthcare Providers

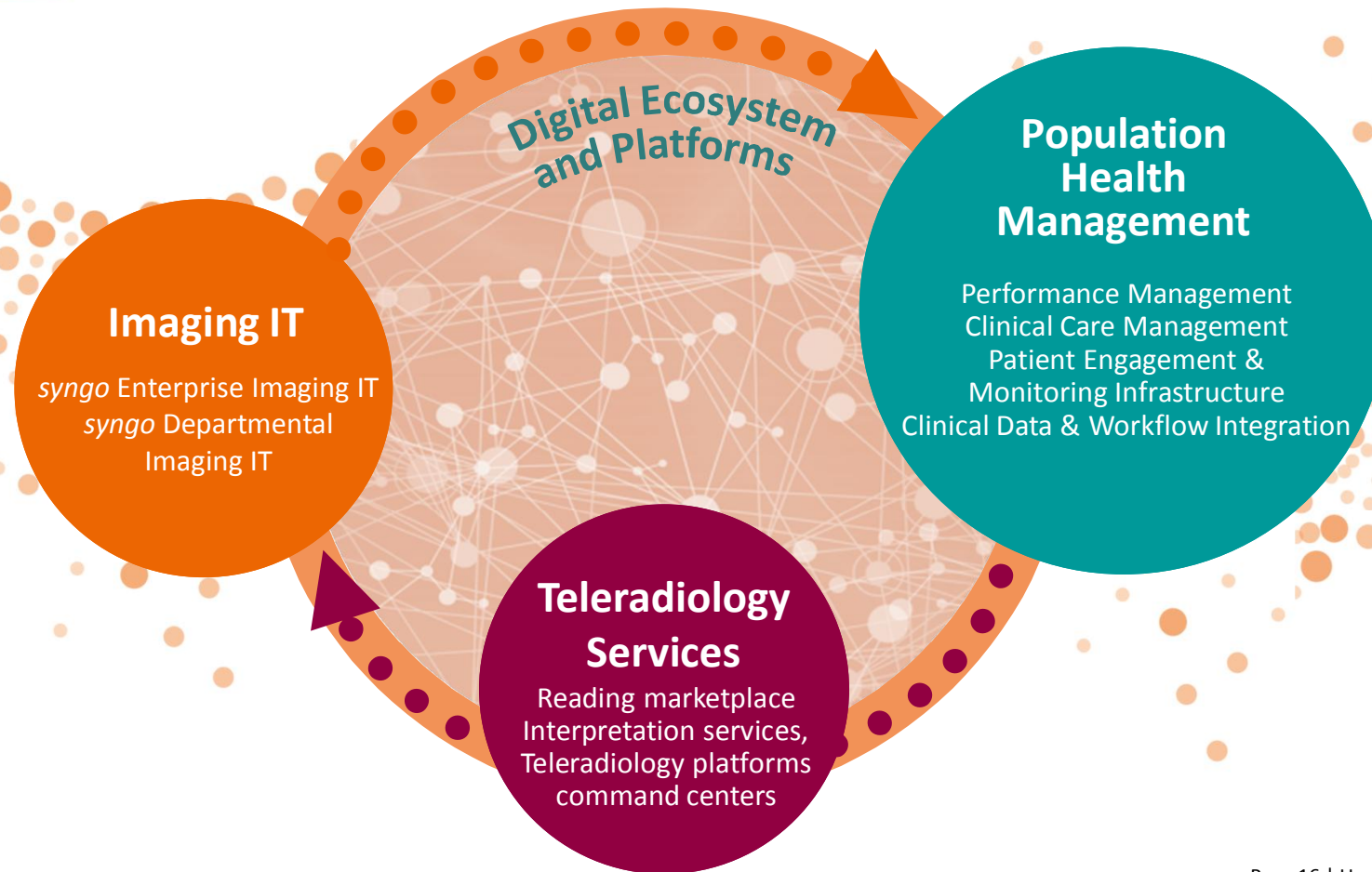


**> 70%**  
of critical clinical  
decisions influenced  
the type of technology  
we provide

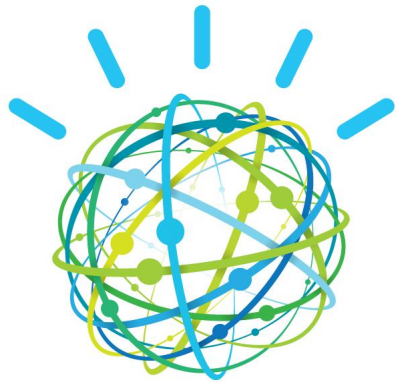
**2%**  
of budget touching  
almost every patient

**covering all major  
disease states**

# Pioneering Healthcare – Through Digital Services



# Siemens Healthineers and IBM Watson Health partner on Population Health Management (PHM)



IBM Watson Health

The new alliance is to **support healthcare providers** seeking to **improve outcomes and reduce costs**

Five year, global strategic alliance in PHM to jointly **develop innovative solutions and services** to expand portfolio

We will augment the existing IBM PHM offerings with **lab and imaging assets and services** and will sell it into the **global Healthcare Provider space**

# Pioneering Healthcare – Through Enterprise Services



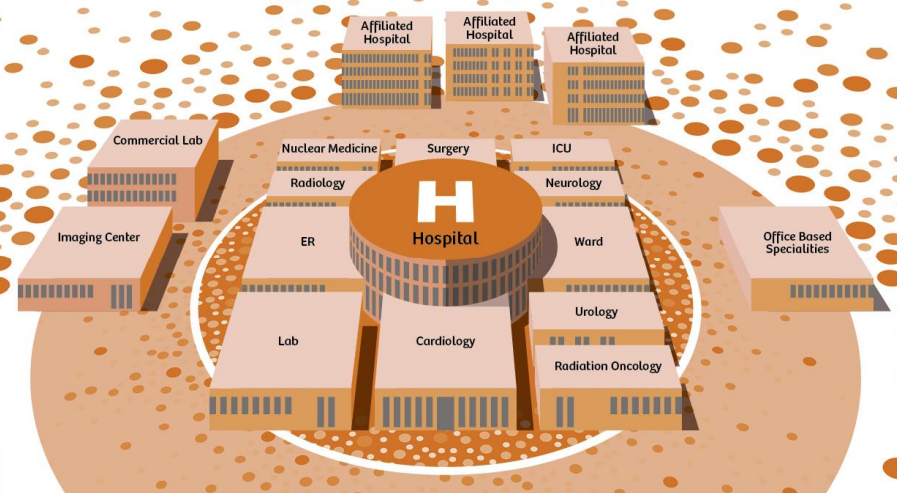
## Siemens and Dutch hospital ADRZ to jointly build and manage new operating theaters

- Providing the customer with **medical systems and service** and **updating** their equipment for ten years
- **Special financing model** makes it possible to build six new ORs
- Siemens Healthineers will **act as lessor**
- Biggest hospital in the Zeeland Province in the southern part of the Netherlands: 2,200 employees and 23,000 hospitalizations annually
- Expected completion date: February 2017
- Executing on our customized, **long-term MES partnership strategy**



# Together

People Transforming  
the Industry



# Our People – Engineers. Pioneers. Passionate for Healthcare.

**10%**

of employees  
with clinical  
background

**1,474**

invention  
disclosed  
in 2015

**7,660**

**R&D employees**

17% of  
entire company



“A day without  
**passion for  
healthcare** is a  
lost day”

**≥85%**

employee  
engagement

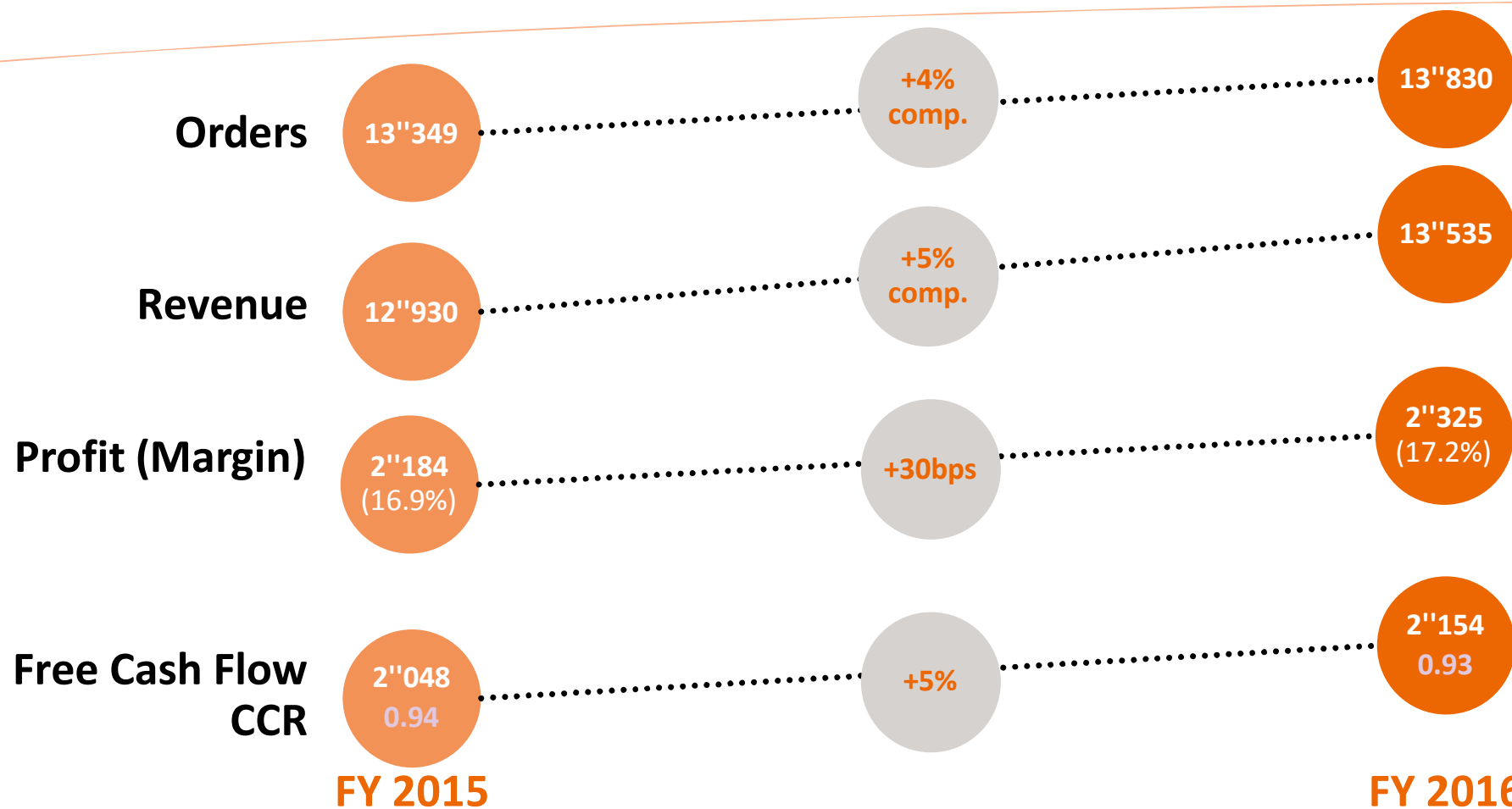
**50%**

of employees  
globally  
with Siemens  
Healthineers  
**> 10 years**

**92%**

of employees  
committed  
to go the  
“extra-mile”

# FY2016: annual results



# Preparing listing of Siemens Healthineers to strengthen leadership position

## Transformation in the healthcare market continues...

- **Paradigm shifts visible: Transition** from
  - **product business** to **solving hospital system wide challenges**
  - **fee for service** to **managing outcome based health**
- **Race for customer relevance intensified**
- **Competitor & provider consolidation ongoing**
- **Investments required to respond to paradigm shifts**

## ... listing best suited to manage transition

- **Strengthen and build position in identified growth fields**
- **High strategic flexibility and capital allocation in light of changing healthcare market**
- **Focus on key success factors continues**



**STRENGTHEN HEALTHINEERS BUSINESS  
IN SIEMENS**

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