Moving forward
with fortitude.

BEST IN KLAS®

GLOBAL SOFTWARE 2023

Recognizing the software organizations that excelled in helping
healthcare professionals deliver better patient care

Finding Fortitude in the Face of Uncertainty

As we've come out of the pandemic's peak, the phrase "new normal" has been used a lot. Virtual options are the new normal. Wearing a mask when you're sick is the new normal. But what will the new normal look like for the healthcare industry?

During the height of the pandemic, everyone in healthcare was sprinting—they had to communicate and innovate in completely new ways to help deliver patient care. However, sprinting is not a sustainable pace. A CIO recently shared with me, "My team needs a breather." And who can blame them? Due to staffing shortages, many teams have fewer seasoned coworkers they can lean on, and the pandemic has tested healthcare workers in other unprecedented ways.

To sustainably maintain momentum, both healthcare organizations and vendors must fortify themselves and evaluate what is and what isn't helping. Healthcare organizations can't revert to old, pre-pandemic workflows. Vendors can't stretch themselves to meet customer needs only to let their performance slip shortly thereafter. As an industry, we have to keep improving patient care by utilizing new tools and partnering with patients.

It's hard to say what the new normal will look like for healthcare, but if we are to move forward with fortitude, we can't stick to the status quo. Determining your organization's next steps may not be as obvious, quick, or easy as it once was. There are lots of initiatives organizations can focus their finite resources on—like partnering with patients, addressing staffing shortages, and reducing revenue cycle friction. But realistically, organizations can tackle only a few at a time. Choose your initiatives with courage and then double-down on your efforts, refusing to be intimidated by what's to come.

My hope is that this Best in KLAS report can help you maintain momentum as you chart your course. We take great pride in ensuring our data collection and reporting are of the highest quality and integrity. Just recently, we faced an unprecedented situation when we discovered a miscategorized survey in our Best in KLAS data. We had already closed data collection and begun compiling the report, but after correctly categorizing the survey, we realized the great impact it had on vendor rankings. Because we seek to be an organization of integrity, we chose to do the hard thing—the right thing—and notify a vendor that they are not, in fact, a 2023 Best in KLAS winner. As difficult as this situation has been, it has underscored our need to have clear rules for addressing data issues, stay true to our core values, and realize our mission.

This report exists because many of you make time in your busy lives to speak with KLAS and share invaluable insights. I feel privileged that KLAS can share this data with the industry and hopefully aid you in defining your next steps forward.

Thank you for instilling hope and courage in us, even in the face of uncertainty.

Adam M. Gale

Adam M. Gale
CEO
KLAS Research

Understanding This Report

KLAS makes thousands of proactive calls each year to collect the research necessary for this report. In every instance, the KLAS methodology includes screening for bias to ensure as clean and random a sample as possible. To learn more about KLAS' research process and methodology, please visit our website.

Ranked Solutions

Ranking and Overall Performance Score: For each market segment in this report, the software products eligible to compete for Best in KLAS are ranked by their overall performance score (100-point scale). These scores are based on customer responses to 16 numeric ratings questions and 4 yes/no questions, all weighted equally. Overall scores are calculated by averaging all evaluations collected for a given product over the last 13 months. Only one product from any given vendor may be eligible for Best in KLAS ranking within any given market segment. This product will always be the vendor's most recent version. In instances where a vendor has multiple products of similar age (through acquisition, etc.), only the most comprehensive product (i.e., the product the vendor would lead with in the segment) is eligible.

Trend: Where available, trend data is included to indicate the percentage by which a score has changed from the previous year's Best in KLAS report. "N/A" in the trend column indicates that a product was not included in the previous Best in KLAS report or was not a ranked solution in that report.

Software grading scale for customer experience pillars

A+	95.0+
A	91.0–94.9
A-	88.0–90.9
B+	85.0–87.9
B	81.0–84.9
B-	78.0–80.9
C+	75.0–77.9
C	71.0–74.9
C-	68.0–70.9
D+	65.0–67.9
D	61.0–64.9
D-	58.0–60.9
F	< 58.0

Customer Experience Pillars: To enable readers to more quickly understand high-level differences in vendor performance, the questions from the KLAS evaluation are organized into six customer experience pillars—culture, loyalty, operations, product, relationship, and value, with vendors receiving a letter grade in each (see grading scale above).

Category	Culture	Loyalty	Operations	Product	Relationship	Value
Standard **software** evaluation metrics	Proactive service Keeps all promises Product works as promoted	Part of long-term plans Would you buy again Likely to recommend Forecasted satisfaction Overall satisfaction	Quality of training Quality of implementation Ease of use	Product quality Product has needed functionality Supports integration goals Delivery of new technology	Quality of phone/web support Executive involvement	Money's worth Avoids charging for every little thing Drives tangible outcomes

Solutions Not Ranked

Solutions in the categories below are not eligible for Best in KLAS ranking, though overall performance scores and customer experience pillar grades are still displayed.

- **Limited data (*)**: Solutions whose sample sizes do not meet KLAS' required thresholds for Best in KLAS ranking but do meet lower "limited data" thresholds. See "Sample Sizes" below for more details.
- **Newly rated [NR]**: Solutions are newly rated. This status was achieved after the deadline for solutions to be included in the Best in KLAS report.
- **Not eligible [NE]**: To be eligible for Best in KLAS ranking in regions outside the US, acute care EMR solutions must have evaluations from two or more countries within the region, and at least one customer in the region must be a HIMSS Level 6+ customer as confirmed by KLAS. PACS solutions outside the US must also have evaluations from two or more countries within the region, and at least one customer in the region must be using the PACS to manage 300,000+ images per year, demonstrating that the solution can scale for organizations with larger imaging needs.
- **Not primary [NP]**: Solutions that may still be purchased but are not a vendor's lead solution in a market segment. In some cases, these solutions may not be actively sold in the listed market segment.
- **Regional [R]**: Solutions for which the majority of data comes from organizations in a small, specific geographical area.

Sample Sizes

KLAS requires that the sample size for any given product reach certain thresholds before data can be reported.

Total evaluations vs. unique organizations: The sample sizes displayed throughout this report (e.g., n=16) represent the total number of *individual respondents* who submitted an evaluation ("total evaluations") for a given product. To allow for the representation of differing perspectives within any one customer organization, these samples may include individuals from the same organization. However, in order for a product to be eligible for Best in KLAS ranking, feedback must have been received from a certain number of *unique organizations* (see "data thresholds" below). This is done to prevent any one organization's feedback from disproportionately impacting a product's score.

Data thresholds for non-US regions: Within each region in KLAS' global research, sample sizes of 6 or more *unique organizations* are considered fully rated, and sample sizes of 3–5 unique organizations are marked as limited data. If the sample size is less than 3, no score is shown. It should be noted that a vendor's sample size may vary from question to question as some respondents choose not to answer particular questions.

What's New in Best in KLAS?

1. **New Market Segments**
   KLAS consistently reviews the market segments highlighted in the Best in KLAS report to ensure we are measuring vendor performance in the areas of most interest to healthcare providers. This year, we have added a new segment—Clinical Portals. Data in this segment currently comes only from organizations in Europe.

2. **Acquisitions and Name Changes**
   Occasionally, you might not find the vendor you are looking for in KLAS data. In some cases, this is due to a name change caused by a merger, acquisition, or rebranding. Please note the following changes since last year's Best in KLAS report:
    - Allscripts' hospital and large physician practice business was acquired by Harris and rebranded to Altera Digital Health
    - Cerner was acquired by Oracle and rebranded as Oracle Health

For recently published reports visit
klasresearch.com/reports

KLAS Advisory Board

The KLAS Advisory Board, comprised of some of the best and brightest in healthcare, guides our efforts to measure and improve the world's healthcare technology. This group of dedicated leaders exemplifies the very best healthcare has to offer.

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MD, MSc, FHIMSS

CMIO
Tire Devlet Hastanesi
Turkey

"The efforts of this board have had a deep impact on the direction of KLAS. Thank you all for your guidance throughout the years."
—Adam M. Gale, CEO, KLAS Research

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Collaborate for Real Change

KLAS RESEARCH | Arch Collaborative

When it comes to solving healthcare's biggest challenges, don't go it alone.

Through the Arch Collaborative, you can collaborate with peers to improve clinician satisfaction with any EHR. Instead of ripping and replacing, use Arch Collaborative best practices to help you lift where you stand.

Backed by data from over **353,000 clinicians**, learn how to:

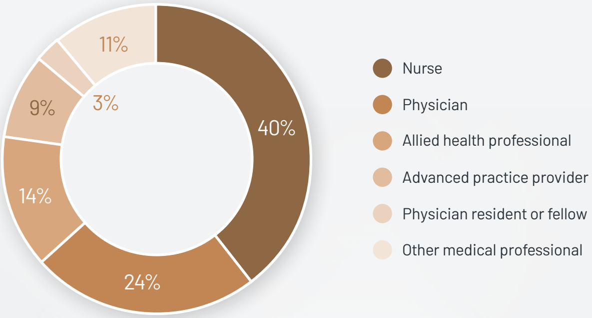
- Optimize your EHR
- Improve your clinicians' satisfaction
- Reduce EHR-related burnout

We can make healthcare better, together.

Learn more at
klasresearch.com/arch-collaborative

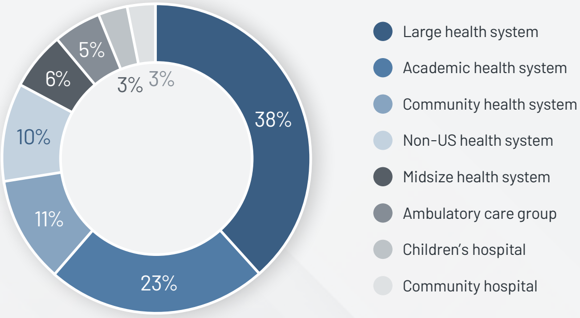
Arch Collaborative Respondents

By clinical background (n=353,052)



Arch Collaborative Participants

By organization type (n=290 organizations)



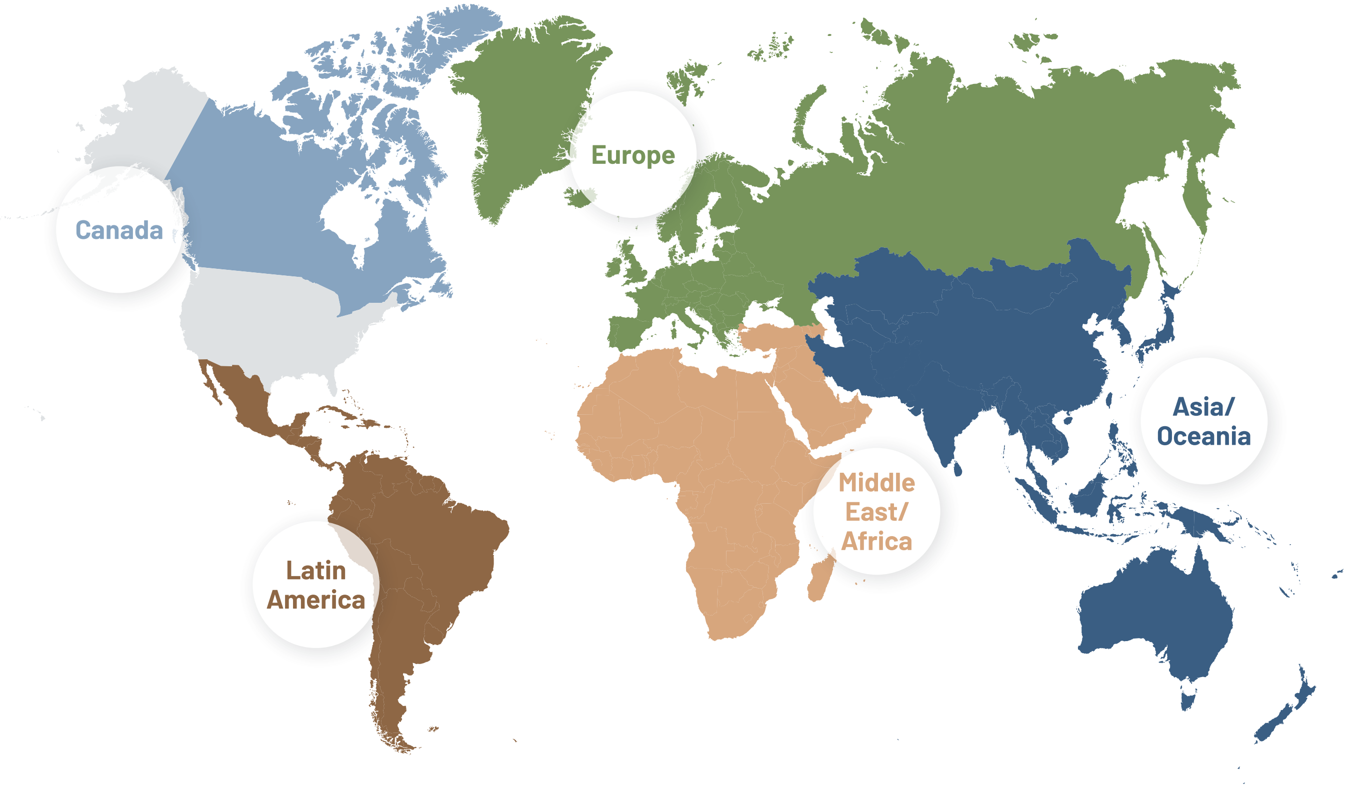
KLAS RESEARCH

Introduction

Executive Insights

The Global Best in KLAS report examines the performance of multinational healthcare information technology (HIT) products and vendors in regions outside the United States, including Asia/Oceania, Canada, Europe, Latin America, and the Middle East/Africa. Country-specific and custom solutions are not included in the data.

Regional Breakout



Key Learnings from 2022

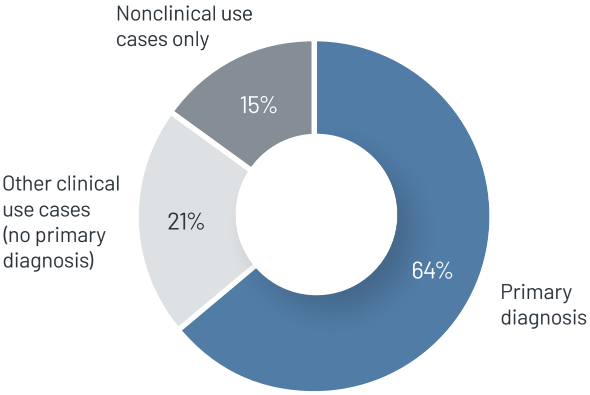
1 Digital Pathology Continues to Expand

After explosive growth in Europe in 2021, adoption of digital pathology solutions continued strong in 2022, fueling rapid uptake in the US as well. Healthcare organizations in both Europe and the US report that they are considering a large number of image management, scanner, and AI solutions, as vendors vie to establish themselves as market leaders. 2022 also saw advances in cytology slide imaging; historically, only histology slides have been scanned and read digitally.

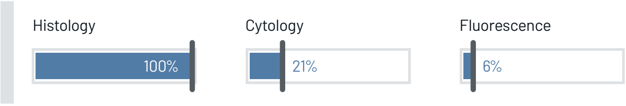
Note: KLAS' most recent report on digital pathology focused specifically on the US market, but its insights (see chart below) are relevant to the European market as well.

How Is Digital Pathology Being Used by Provider Organizations in the US?

Organizations live with digital pathology (n=33)



Types of Slides Being Read Digitally (n=33)

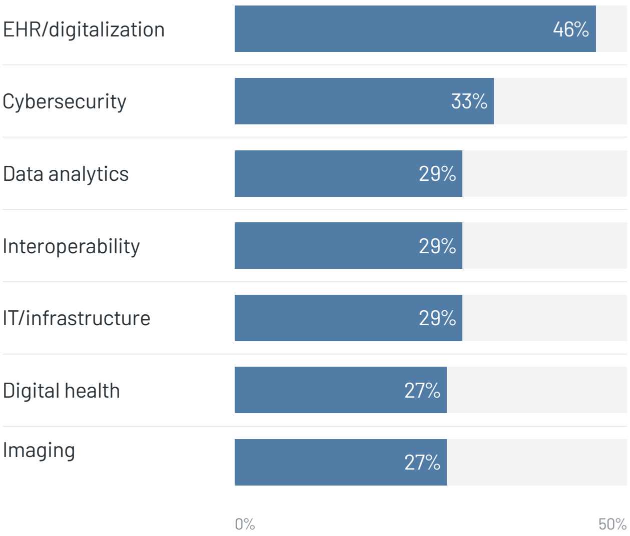


2 Providers Are Playing Catch-Up Post-Pandemic

The last few years have necessarily seen healthcare organizations focus primarily on pandemic-related technologies, such as virtual care platforms. However, with the peak of the pandemic past, organizations have turned their attention back to more foundational needs. In a midyear snapshot taken for KLAS' annual global summit, areas such as cybersecurity and IT infrastructure were much higher on organizations' IT priority lists than they had been in 2019. In recent months, digital health has gotten more attention, following a cooling period at the tail end of the pandemic (a full report on this area is slated for publish in March 2023).

What Are the Top Three Priority Areas of IT Investment for Your Organization/Department?

Respondents could select more than one answer (n=132)



3 Interoperability and Regional Data-Sharing Efforts Gain Speed

Interoperability continues to receive significant attention from healthcare organizations. This includes regional health initiatives aimed at consolidating care providers or sharing data between providers—these initiatives are being rolled out in places like Belgium, Canada (with new health exchanges in Ontario), France, Germany, and the UK (with newly formed integrated care systems). This is the first year KLAS is measuring health information exchange technology—referred to here as clinical portals—in the Global Best in KLAS report (see page 17).

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The Best in KLAS award is given to vendors to recognize their outstanding efforts to help healthcare professionals deliver better patient care. Global awards are given in the following software market segments: (1) acute care EMR, (2) clinical portals, (3) digital pathology, (4) PACS, and (5) virtual conferencing platforms.

Acute Care EMR

Asia/Oceania
IQVIA Arcus Air HIS 85.1

Canada
Epic EpicCare Inpatient EMR 89.3

Europe
Epic EpicCare Inpatient EMR 84.9

Latin America
Philips Tasy 78.7

Middle East/Africa
Oracle Health (Cerner) Millennium PowerChart 86.7

Clinical Portals

Europe
InterSystems HealthShare Unified Care Record 85.0

Digital Pathology

Europe
TRIBUN Health CaloPix 90.7

PACS

Asia/Oceania
Sectra PACS 79.0

Canada
Sectra PACS 92.8

Europe
VISUS JiveX 91.2

Latin America
Fujifilm Synapse 91.0

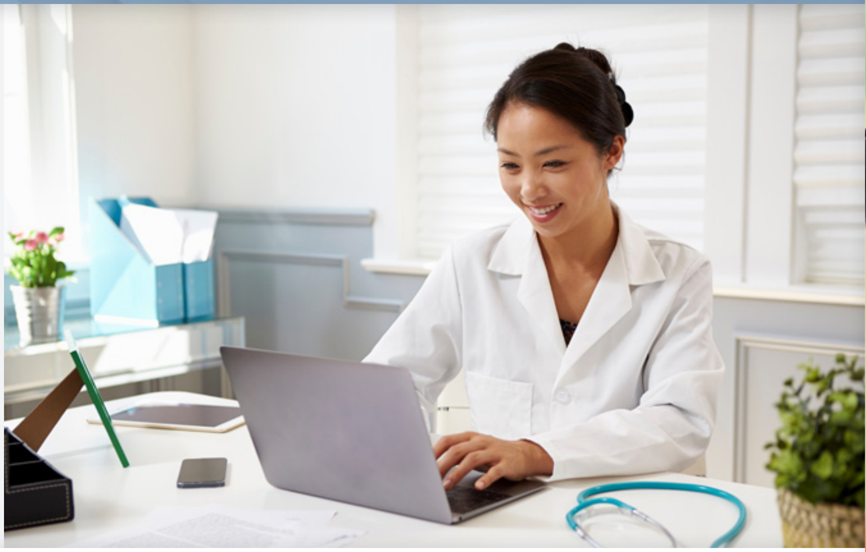
Middle East/Africa
Agfa HealthCare Enterprise Imaging for Radiology 87.0

Video Conferencing Platforms

Middle East/Africa
Microsoft Teams 91.0

Be Heard, Be Counted

Share your voice, and learn from another's



Give a little feedback on the tools you're using and get a lot of insights in return via free access to KLAS ratings, commentary, and market trends.

- See how healthcare IT vendors compare
- Find ratings on vendor performance
- Learn about new and emerging technology

Speak up and share your experiences! We can't change healthcare without you.

24,000+ **evaluations from healthcare professionals** across the globe who shared feedback regarding the software and services they use. The vast majority of these evaluations came from on-the-phone discussions, resulting in deep, insightful feedback.

4,500+ **healthcare organizations** across the world whose feedback is represented in KLAS research. The voices of these professionals give us not only the scores you see in this Best in KLAS report, but all the scores and commentary we publish online and in other reports throughout the year.

1,000+ **healthcare technology products and services measured** in KLAS' scores, commentary, and reports. If you're making a software or services purchase decision in healthcare, take advantage of the hindsight of those who have walked a similar path.

> ***"We use KLAS quite a bit whenever we are trying to make market decisions or just get the pulse of what other folks are dealing with. Oftentimes, we look up the comments and think that we could have written them. So KLAS is very helpful for sure."*** —Director, small acute care facility

Share your voice:
klasresearch.com/evaluation

KLAS RESEARCH

Global Software Rankings

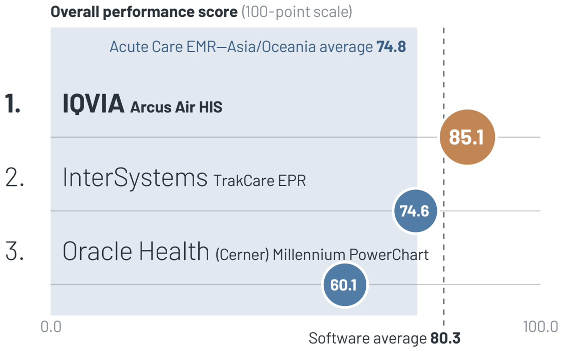
Acute Care EMR Asia/Oceania

Segment definitions can be found on page 32.

BEST IN KLAS® GLOBAL SOFTWARE 2023

Solution Comparison

Grading methodology can be found on page ii.



	Trend (2022–2023)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
1. **IQVIA** Arcus Air HIS	N/A	n=10	B+	**A-**	B	B+	B+	B-
2. InterSystems TrakCare EPR	0%	n=18	C-	B	C-	C	B-	C
3. Oracle Health (Cerner) Millennium PowerChart	-12%	n=14	D-	D	D-	D	D	F

Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Altera Digital Health Sunrise Acute Care (Allscripts)	58.0*	n=4	F*	F*	F*	D+*	F*	D*
Epic EpicCare Inpatient EMR	82.1*	n=8	B+*	B+*	B-*	B-*	B*	C*
ezCaretech BESTCare 2.0 (South Korea Only)	87.9	n=10	A	A	B	B	B+	A-
Telstra Health Kyra Clinical (Australia Only) [NR]	71.1*	n=7	D*	B-*	C-*	D+*	C*	C+*

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

Other notable performances in Acute Care EMR—Asia/Oceania Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	IQVIA Arcus Air HIS n=9 **100%**	None

Acute Care EMR Asia/Oceania Continued

Recent Insights

Asia/Oceania EMR 2022

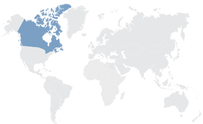
First In-Depth Look at Regional Market Share & Vendor Performance

Key Findings:

1. IQVIA Growing Fast in Asia, with Improved Support & Delivery in South and Southeast Asia
2. ezCaretech a Strong Performer in South Korea, Slow to Expand to Other Countries
3. InterSystems Delivers Solid Performance to Broad Customer Base
4. Oracle Health (Cerner) Has the Largest Existing Market Share in Oceania, Lowest Customer Satisfaction
5. Epic (Limited Data) Stands Out for Relationships in Australia
6. Renewed Customer Focus from InterSystems & Telstra Have Led to Improvements

Acute Care EMR Canada

Segment definitions can be found on page 32.



BEST IN KLAS®
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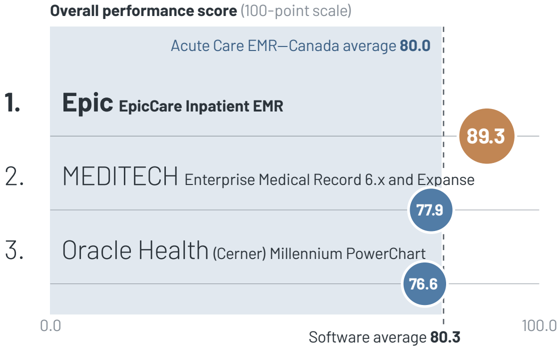
2023

Epic

Solution Comparison

Grading methodology can be found on page ii.



	Trend (2022–2023)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
1. Epic EpicCare Inpatient EMR	-4%	n=11	A	A+	B	B+	A-	B
2. MEDITECH Enterprise Medical Record 6.x and Expanse	-5%	n=11	C+	C+	C	C	B+	B+
3. Oracle Health (Cerner) Millennium PowerChart	+8%	n=7	D	B+	C	C+	D	F

Customer experience pillars: Culture, Loyalty, Operations, Product, Relationship, Value

Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
Altera Digital Health Sunrise Acute Care (Allscripts)	79.0*	n=5	B+*	C+*	B*	B-*	B-*	C-*
MEDITECH MAGIC & C/S [NP]	67.2*	n=4	D-*	C-*	D+*	D-*	C+*	C+*

Customer experience pillars: Culture, Loyalty, Operations, Product, Relationship, Value

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

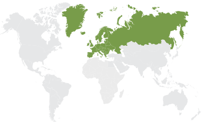
Definitions can be found on page iii.

Other notable performances in Acute Care EMR—Canada Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
MEDITECH Enterprise Medical Record 6.x and Expanse n=8 100%	Epic EpicCare Inpatient EMR n=11 100%	Epic EpicCare Inpatient EMR n=11 100%	Epic EpicCare Inpatient EMR n=10 100%
		Oracle Health (Cerner) Millennium PowerChart n=7 100%	Oracle Health (Cerner) Millennium PowerChart n=7 100%

Acute Care EMR Europe

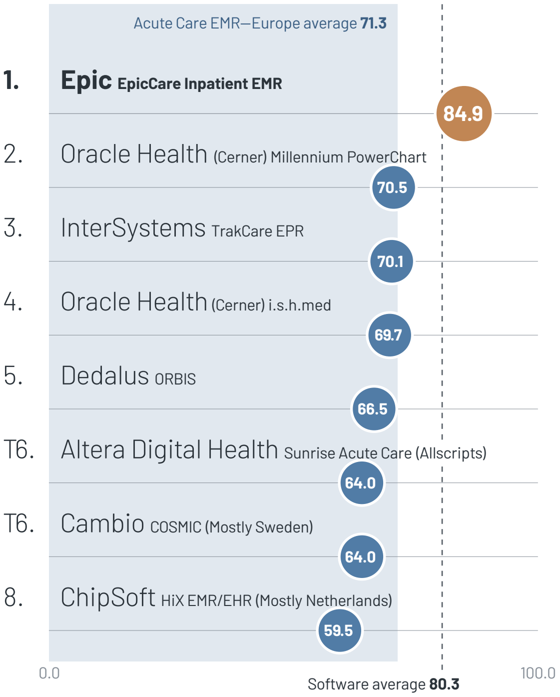
Segment definitions can be found on page 32.



Solution Comparison

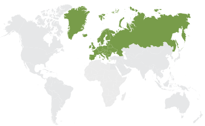
Grading methodology can be found on page ii.

Overall performance score (100-point scale)



	Trend (2022–2023)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
1. Epic EpicCare Inpatient EMR	-2%	n=16	**A-**	**A**	B-	B	**A-**	C+
2. Oracle Health (Cerner) Millennium PowerChart	-8%	n=10	D	C	D+	C	C+	D+
3. InterSystems TrakCare EPR	-1%	n=32	D-	C+	D+	C	C	C
4. Oracle Health (Cerner) i.s.h.med	-11%	n=8	F	C	D+	C+	B-	C-
5. Dedalus ORBIS	-2%	n=7	F	C	C	C	C	F
T6. Altera Digital Health Sunrise Acute Care (Allscripts)	-12%	n=7	D-	D	C-	D+	D	D-
T6. Cambio COSMIC (Mostly Sweden)	+5%	n=6	F	C+	D+	D	C	D-
8. ChipSoft HiX EMR/EHR (Mostly Netherlands)	-9%	n=8	F	D+	D+	D	D-	F

Acute Care EMR Europe Continued



Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
CompuGroup Medical medico (Mostly Germany)	65.9*	n=5	F*	D+*	C+*	C*	C-*	F*
Dedalus DxCare (Mostly France)	70.8*	n=5	D*	B-*	C*	C*	C+*	D*
Dedalus Lorenzo (UK Only) (DXC Technology) [NP]	77.0*	n=3	D*	C+*	C*	B-*	C+*	A*
Deutsche Telekom Clinical Solutions iMedOne (Mostly Germany)	74.4*	n=5	D*	B*	C+*	C+*	B-*	D+*
MEDITECH Enterprise Medical Record 6.x and Expanse	82.8*	n=4	B*	B*	C*	B-*	B+*	A*

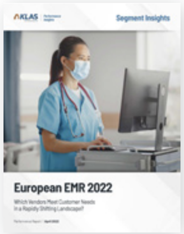
*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

Other notable performances in Acute Care EMR—Europe Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Epic EpicCare Inpatient EMR n=15 **100%**	Epic EpicCare Inpatient EMR n=15 **100%**
		InterSystems TrakCare EPR n=31 **100%**	

Recent Insights



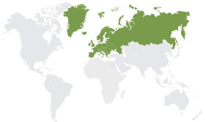
European EMR 2022

Which Vendors Meet Customer Needs in a Rapidly Shifting Landscape?

Key Findings:

1. Dedalus & CompuGroup Medical Increase Market Presence via Acquisitions; Cerner Shifts Strategies
2. Softway Medical & Epic See Most Organic Growth in Europe
3. Multiregional Vendors Epic & Cerner Deliver Strong, Consistent Experience; Telekom Leads among Regional Vendors
4. UK, Ireland, and Channel Islands: Cerner Drives Outcomes amid Growth; Epic Rapidly Expands Regional Presence; InterSystems Improving after Growing Pains
5. DACHL: Dedalus Leads in Market Share; Telekom & Cerner Drive Quality Customer Experience
6. Benelux/Northern Europe: Epic's Strong Partnerships Positively Impact Customer Satisfaction; Many ChipSoft Customers Feel Stuck
7. Western Europe: Softway Medical Leads French Market in Recent Wins; Various Challenges Drive Low Satisfaction among InterSystems & Dedalus Customers
8. Southern Europe: InterSystems Delivers Strong Product & Relationship; Dedalus Expands Large Customer Base

Acute Care EMR Europe Continued



Acute Care EMR Vendor Presence—Europe

Vendors ordered alphabetically

✓ KLAS validated

	Benelux	DACHL	France	Northern Europe	Southern Europe	UK, Ireland, and Channel Islands
Altera Digital Health Sunrise Acute Care (Allscripts)					✓†	✓
Cambio COSMIC (Mostly Sweden)				✓		✓†
ChipSoft HiX EMR/EHR (Mostly Netherlands)	✓					
CompuGroup Medical medico (Mostly Germany)		✓				
Dedalus DxCare			✓			
Dedalus Lorenzo (DXC Technology)						✓
Dedalus ORBIS		✓	✓			
Deutsche Telekom Clinical Solutions iMedOne (Mostly Germany)		✓				
Epic EpicCare Inpatient EMR	✓	✓		✓		✓
InterSystems TrakCare EPR			✓		✓	✓
MEDITECH Enterprise Medical Record 6.x and Expanse						✓
Oracle Health (Cerner) i.s.h.med		✓			✓	
Oracle Health (Cerner) Millennium PowerChart	✓	✓†	✓†	‡	✓†	✓

† KLAS has validated client(s) in the region/country, but the vendor no longer markets in the area

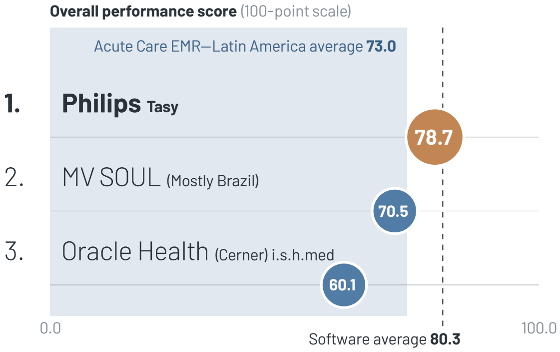
‡ Implementing, not yet live

Acute Care EMR Latin America

Segment definitions can be found on page 32.

Solution Comparison

Grading methodology can be found on page ii.



	Overall performance score (100-point scale)	Trend (2022–2023)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
1. **Philips** Tasy	78.7	+4%	n=18	C	B	B−	B	C+	C−
2. MV SOUL (Mostly Brazil)	70.5	-3%	n=21	F	B−	C+	C+	D+	D−
3. Oracle Health (Cerner) i.s.h.med	60.1	-18%	n=6	F	D−	D+	C−	C−	F

Customer experience pillars: Culture, Loyalty, Operations, Product, Relationship, Value

Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
Dedalus MedView (Brazil Only)	62.0	n=6	D	D-	C-	F	C-	D-
Dedalus xHIS (DXC Technology)	55.2*	n=3	F*	D-*	F*	F*	F*	D*
InterSystems TrakCare EPR (Chile Only)	80.3	n=12	B	B+	C+	C+	B-	C
NTT DATA ehCOS Clinic	66.9*	n=3	D-*	D-*	C*	C*	C*	D+*
Oracle Health (Cerner) Millennium PowerChart	73.8*	n=3	B-*	B*	C+*	C-*	C+*	F*
Pixeon SmartHealth (Brazil Only)	78.1	n=10	B-	C+	C	B	B-	C

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

Other notable performances in Acute Care EMR—Latin America Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Philips Tasy n=18 **100%**	None
		MV SOUL (Mostly Brazil) n=20 **95%**	

Acute Care EMR Middle East/Africa

Segment definitions can be found on page 32.

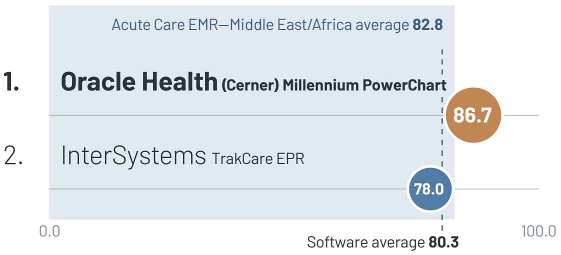
BEST IN KLAS® GLOBAL SOFTWARE 2023

ORACLE Health

Solution Comparison

Grading methodology can be found on page ii.

Overall performance score (100-point scale)



		Trend (2022–2023)	Total evaluations	Customer experience pillars					
				Culture	Loyalty	Operations	Product	Relationship	Value
1.	**Oracle Health** (Cerner) Millennium PowerChart	+1%	n=38	B+	**A**	B+	B	**A-**	B-
2.	InterSystems TrakCare EPR	+2%	n=21	C	B	C+	B-	B	C-

Solutions not ranked
Ordered alphabetically

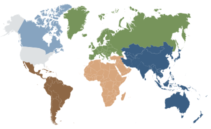
	Overall performance score (100-point scale)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Cloud Solutions VIDA (Mostly Saudi Arabia) [NE]	87.4	n=7	B	A+	B	B	A-	A-
Dedalus Enterprise Management (DXC Technology)	86.4*	n=3	B+*	A*	B*	B-*	B+*	A-*
Epic EpicCare Inpatient EMR	93.6*	n=4	A*	A+*	A-*	A*	A-*	A*
ezCaretech BESTCare 2.0	70.4*	n=5	C+*	C-*	B-*	C*	C-*	F*
Health Insights MEDiCACLOUDCARE [NE]	87.0	n=11	B	A	B+	B+	A-	C+
IQVIA Arcus Air HIS	81.7*	n=7	B*	B*	B-*	B-*	B*	B-*
OASIS HMIS (Mostly Saudi Arabia) [NE]	79.4	n=9	B	B-	C	B	B-	B-

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional [NE] Not eligible

Definitions can be found on page iii.

Other notable performances in Acute Care EMR—Middle East/Africa
Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	InterSystems TrakCare EPR n=20 **100%**	None
		Oracle Health (Cerner) Millennium PowerChart n=36 **100%**	



Recent Insights—Acute Care EMR

Market Share

Global (Non-US) EMR Market Share 2022

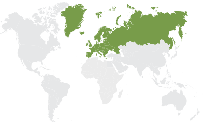
Global (Non-US) EMR Market Share 2022

The Impact of the Pandemic's Second Year

Key Findings:

1. Health Insights, Dedalus, and Cerner Lead Multiregional Vendors in 2021
2. Most-Selected Regional Vendors Are Softway Medical, SIB, and CGM in Europe and MV in Latin America
3. Europe: Softway Medical and SIB Bolstered by GHT Decisions; Dedalus Active in DACHL, Cerner in the UK
4. Middle East/Africa: Health Insights Selected in Large Egypt Decision; InterSystems and IQVIA Lead Out in the Middle East
5. Latin America: In Slowing Brazil Market, MV and Philips Lead; MEDITECH Makes Gains in the Caribbean
6. Asia/Oceania: ezCaretech Branches Out as Asia Rebounds; Oceania Quiet
7. Canada: Two Large MEDITECH Migrations to Expanse; One Conglomerate Chooses Cerner

Clinical Portals Europe



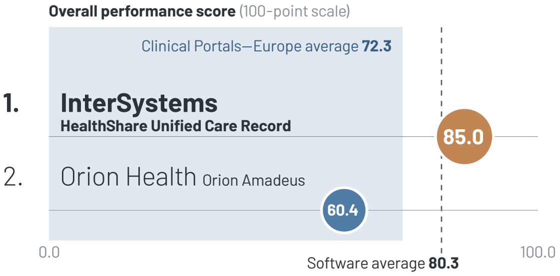
Segment definitions can be found on page 32.

BEST IN KLAS® GLOBAL SOFTWARE 2023

InterSystems® Creative data technology

Solution Comparison

Grading methodology can be found on page ii.



	Trend (2022–2023)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
			Customer experience pillars					
1. InterSystems HealthShare Unified Care Record	N/A	n=7	B	**A-**	B-	B	B+	B-
2. Orion Health Orion Amadeus	N/A	n=8	F	F	C+	D	D	C-

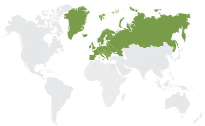
Other notable performances in Clinical Portals—Europe

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	InterSystems HealthShare Unified Care Record n=7 **100%**	InterSystems HealthShare Unified Care Record n=7 **100%**

Digital Pathology Europe

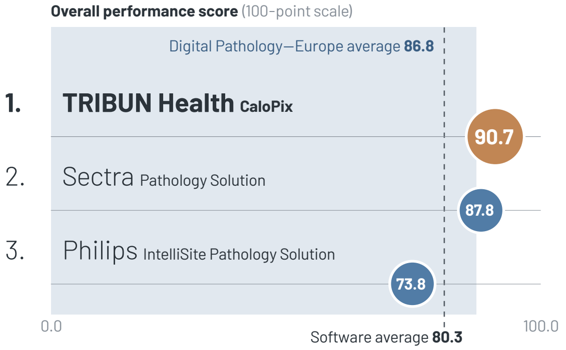
Segment definitions can be found on page 32.



BEST IN KLAS® GLOBAL SOFTWARE 2023

Solution Comparison

Grading methodology can be found on page ii.


Overall performance score (100-point scale)

	Trend (2022–2023)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
1. TRIBUN Health CaloPix	+3%	n=13	A	A	A-	B+	A	A-
2. Sectra Pathology Solution	+2%	n=27	B	A	B+	B	A-	A-
3. Philips IntelliSite Pathology Solution	-11%	n=8	D+	C+	B-	C	C+	C-

Other notable performances in Digital Pathology—Europe

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
Sectra Pathology Solution n=20 **95%**	TRIBUN Health CaloPix n=12 **100%**	Philips IntelliSite Pathology Solution n=7 **100%**	Sectra Pathology Solution n=24 **100%**
		Sectra Pathology Solution n=26 **100%**	TRIBUN Health CaloPix n=12 **100%**
		TRIBUN Health CaloPix n=13 **100%**	

Digital Pathology Vendor Presence—Europe

Vendors ordered alphabetically

✓ KLAS validated

	Benelux	DACHL	France	Northern Europe	Southern Europe	UK, Ireland, and Channel Islands
Philips IntelliSite Pathology Solution	✓	✓	✓	✓	✓	✓
Sectra Pathology Solution	✓	✓	✓	✓	✓	✓
TRIBUN Health CaloPix	✓	✓	✓			

PACS Asia/Oceania

Segment definitions can be found on page 32.

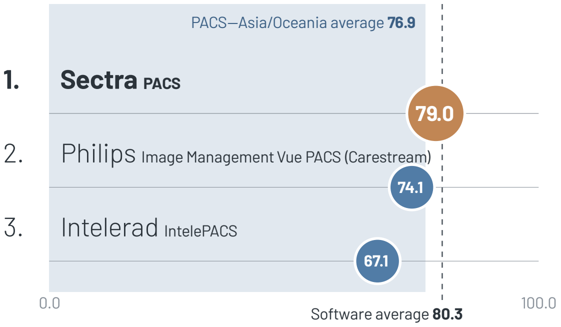
BEST IN KLAS®
GLOBAL SOFTWARE
2023

SECTRA
Knowledge and passion

Solution Comparison

Grading methodology can be found on page ii.

Overall performance score (100-point scale)



		Trend (2022–2023)	Total evaluations	Customer experience pillars					
				Culture	Loyalty	Operations	Product	Relationship	Value
1.	**Sectra** PACS	-6%	n=19	C	B+	B-	C+	C-	C+
2.	Philips Image Management Vue PACS (Carestream)	+5%	n=7	C+	C+	C	C	D	C
3.	Intelerad IntelePACS	-14%	n=12	F	C	D+	C-	F	C+

Solutions not ranked

Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Agfa HealthCare Enterprise Imaging for Radiology	63.6*	n=4	F*	D*	D+*	D+*	C*	F*
Agfa HealthCare IMPAX [NP]	52.8*	n=6	D-*	F*	D+*	F*	C-*	F*
Fujifilm Synapse	84.2*	n=3	B+*	B+*	B-*	B*	B-*	A-*
GE HealthCare Centricity PACS	71.0*	n=4	D+*	D*	B*	B*	C+*	D-*
INFINITT PACS	84.2*	n=5	A-*	B-*	B*	B*	B*	A-*
Medsynaptic Medsynapse PACS [NR]	91.2	n=16	A	A	A	A-	A	B

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

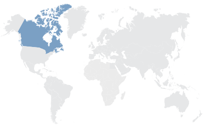
Other notable performances in PACS—Asia/Oceania

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Philips Image Management Vue PACS (Carestream) n=7 **100%** Sectra PACS n=19 **100%**	None

PACS Canada

Segment definitions can be found on page 32.



BEST IN KLAS®
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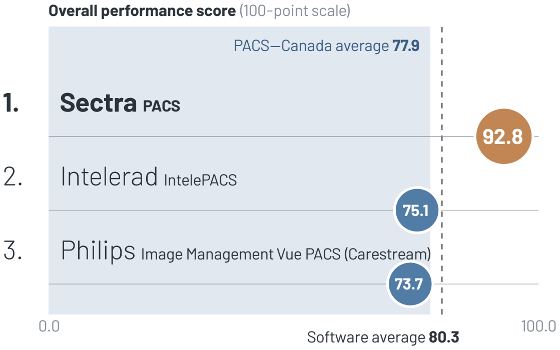
2023

SECTRA

Knowledge and passion

Solution Comparison

Grading methodology can be found on page ii.



	Solution	Overall performance score	Trend (2022–2023)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
1.	**Sectra** PACS	92.8	-1%	n=16	**A**	**A+**	**A**	**A**	**A**	**A-**
2.	Intelerad IntelePACS	75.1	+4%	n=16	C+	C+	B	C+	D+	C-
3.	Philips Image Management Vue PACS (Carestream)	73.7	-12%	n=8	D+	C+	C+	C	B-	C-

Customer experience pillars: Culture, Loyalty, Operations, Product, Relationship, Value

Solutions not ranked

Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
			Customer experience pillars					
Agfa HealthCare Enterprise Imaging for Radiology	75.3*	n=3	D+*	B*	D+*	B-*	D+*	C+*
Agfa HealthCare IMPAX [NP]	59.0	n=8	F	F	C-	D	D	D-
Change Healthcare Radiology Solutions	89.2*	n=4	A*	A*	B+*	B+*	B*	A-*
Fujifilm Synapse	63.0*	n=3	F*	F*	D*	C*	D+*	D+*
GE HealthCare Centricity PACS	65.4*	n=4	D*	D-*	D*	D*	C*	B+*
Philips IntelliSpace PACS [NP]	76.1*	n=5	B*	C*	C*	C-*	C+*	B-*

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

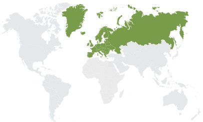
Other notable performances in PACS—Canada

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	None	Sectra PACS n=16 **100%**	Sectra PACS n=14 **100%**

PACS Europe

Segment definitions can be found on page 32.

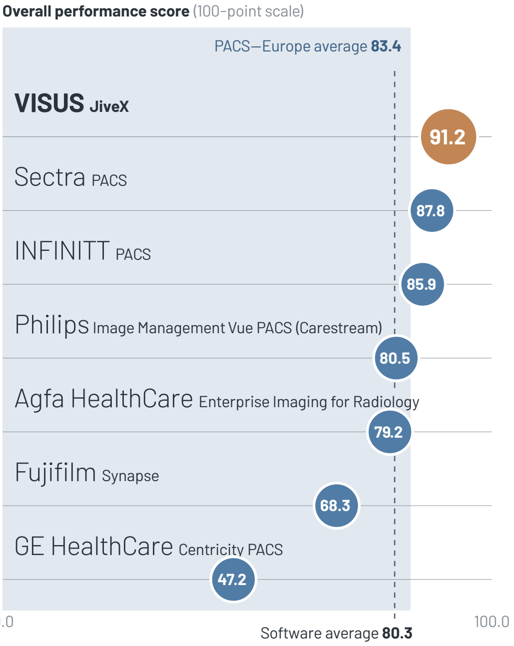


BEST IN KLAS® GLOBAL SOFTWARE 2023

VISUS

Solution Comparison

Grading methodology can be found on page ii.



		Trend (2022–2023)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
				Customer experience pillars					
1.	**VISUS** **JiveX**	0%	n=27	A-	A+	A-	A-	A	A-
2.	Sectra PACS	-1%	n=143	B+	A	B+	B+	B+	B
3.	INFINITT PACS	N/A	n=6	B+	B	B-	B+	A-	A
4.	Philips Image Management Vue PACS (Carestream)	-4%	n=15	C	B+	B-	B-	B	B
5.	Agfa HealthCare Enterprise Imaging for Radiology	-5%	n=24	C-	B+	B-	B-	C+	C+
6.	Fujifilm Synapse	-19%	n=10	D	D	C	C	C	C
7.	GE HealthCare Centricity PACS	+4%	n=10	F	F	F	F	F	F

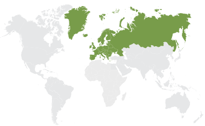
Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
			Customer experience pillars					
Agfa HealthCare IMPAX [NP]	47.3*	n=3	F*	F*	D+*	F*	F*	F*
Change Healthcare Radiology Solutions	79.7*	n=4	C+*	C*	B+*	B*	B*	C*
Intelerad Insight PACS (Mostly UK) (Insignia)	86.3*	n=5	B+*	A*	B*	B*	C+*	A-*
Intelerad IntelePACS	78.6*	n=4	A-*	B*	B*	C+*	C+*	D*
Merative (formerly IBM) Merge PACS	76.8*	n=3	D-*	B*	C+*	B-*	B*	C*
Philips IntelliSpace PACS [NP]	51.7*	n=4	F*	F*	D*	F*	F*	F*
Siemens Healthineers syngo.plaza	82.4*	n=3	C+*	B-*	B+*	B+*	A*	C+*

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

PACS Europe Continued

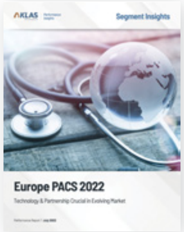


Other notable performances in PACS—Europe

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
INFINITT PACS n=6 **100%**	None	Agfa HealthCare Enterprise Imaging for Radiology n=24 **100%**	VISUS JiveX n=27 **100%**
		VISUS JiveX n=27 **100%**	Sectra PACS n=130 **98%**
		Sectra PACS n=135 **97%**	

Recent Insights



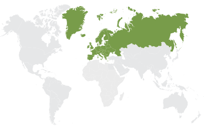
Europe PACS 2022

Technology & Partnership Crucial in Evolving Market

Key Findings:

1. Europe-Based Agfa HealthCare, Philips, Sectra & VISUS Have Broad, Growing Footprint; Philips & Sectra Most Proven to Scale
2. Technology, Partnerships Drive High Satisfaction with VISUS & Sectra
3. Quality Technology Compensates for Inconsistent Support for Philips Image Management Vue PACS; Agfa HealthCare Has Improved Stability, Delivery with Go-Forward Platform
4. UK, Ireland, and Channel Islands: Sectra, Agfa HealthCare, Philips & Intelerad (Insignia) Deliver in the UK; Fujifilm & GE HealthCare Customers Looking Elsewhere
5. DACHL: VISUS Leverages Market Knowledge to Drive Strong Customer Experience; High-Performing Sectra Is Close Competition
6. Benelux: Agfa HealthCare Improves & Philips Facilitates Smooth Carestream Transition in Home Region
7. Other European Regions: Sectra Delivers Inconsistently in Northern Europe but Excels in Western Europe; VISUS Drives High Satisfaction in Southern and Eastern Europe

PACS Europe Continued



PACS Vendor Presence—Europe

Vendors ordered alphabetically

✓ KLAS validated

[NP] Not primary

	Benelux	DACHL	France	Northern Europe	Southern Europe	UK, Ireland, and Channel Islands
Agfa HealthCare Enterprise Imaging for Radiology	✓			✓	✓	✓
Agfa HealthCare IMPAX [NP]	✓			✓	✓	✓
Change Healthcare Radiology Solutions			✓			✓
Fujifilm Synapse			✓		✓	✓
GE HealthCare Centricity PACS	✓	✓	✓	✓	✓	✓
INFINITT PACS		✓	✓			
Intelerad Insight PACS (Insignia)						✓
Intelerad IntelePACS						✓
Merative (formerly IBM) Merge PACS	✓					✓
Philips IntelliSpace PACS [NP]		✓	✓			✓
Philips Image Management Vue PACS (Carestream)	✓	✓	✓	✓	✓	✓
Sectra PACS	✓	✓	✓	✓	✓	✓
Siemens Healthineers syngo.plaza		✓			✓	
VISUS JiveX	✓	✓	✓	✓	✓	

PACS Latin America

Segment definitions can be found on page 32.

BEST IN KLAS®
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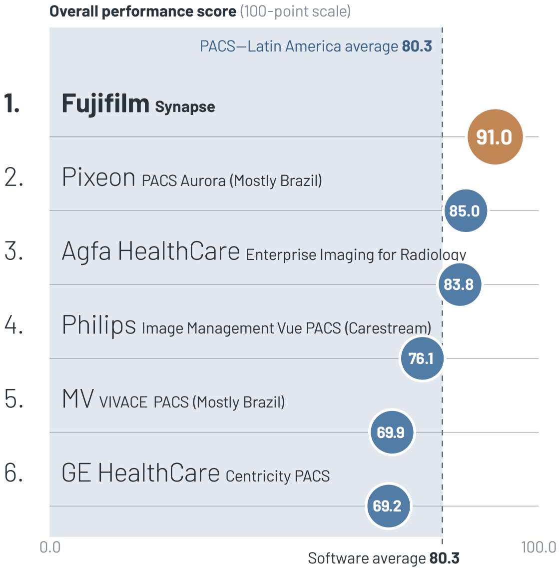
2023

FUJIFILM

Solution Comparison

Grading methodology can be found on page ii.



	Solution	Overall performance score	Trend (2022–2023)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
1.	**Fujifilm Synapse**	91.0	+2%	n=10	B+	**A+**	B+	**A-**	**A-**	**A**
2.	Pixeon PACS Aurora (Mostly Brazil)	85.0	-2%	n=18	B-	**A-**	B	B	B	B+
3.	Agfa HealthCare Enterprise Imaging for Radiology	83.8	-2%	n=7	B-	**A-**	B	B	B	C+
4.	Philips Image Management Vue PACS (Carestream)	76.1	+2%	n=23	C-	B	B-	B-	D+	C-
5.	MV VIVACE PACS (Mostly Brazil)	69.9	-7%	n=12	F	C	B-	C+	C-	D
6.	GE HealthCare Centricity PACS	69.2	N/A	n=6	D+	C	B-	C	F	D-

Customer experience pillars: Culture, Loyalty, Operations, Product, Relationship, Value

Solutions not ranked

	Overall performance score (100-point scale)	Total evaluations	Culture	Loyalty	Operations	Product	Relationship	Value
Agfa HealthCare IMPAX [NP]	88.4	n=11	A-	B	A-	A-	A	A-

Customer experience pillars

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional

Definitions can be found on page iii.

Other notable performances in PACS—Latin America

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?

Fujifilm Synapse	n=10	**100%**

Keeps all promises?

None

Part of long-term plans?

Fujifilm Synapse	n=10	**100%**

Would you buy again?

Agfa HealthCare Enterprise Imaging for Radiology	n=7	**100%**
Fujifilm Synapse	n=10	**100%**
Pixeon PACS Aurora (Mostly Brazil)	n=18	**100%**

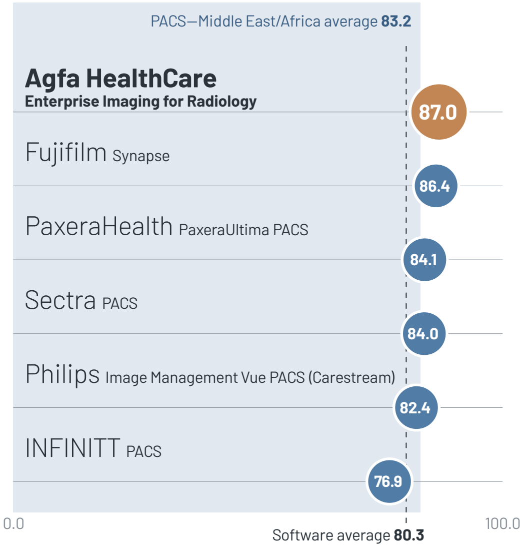
PACS Middle East/Africa

Segment definitions can be found on page 32.

Solution Comparison

Grading methodology can be found on page ii.

Overall performance score (100-point scale)



		Overall performance score	Trend (2022–2023)	Total evaluations	Customer experience pillars					
					Culture	Loyalty	Operations	Product	Relationship	Value
1.	**Agfa HealthCare** **Enterprise Imaging for Radiology**	87.0	+5%	n=14	B	A	B	B+	B+	B
2.	Fujifilm Synapse	86.4	N/A	n=9	B	A	B+	B	B+	B
3.	PaxeraHealth PaxeraUltima PACS	84.1	-4%	n=22	B	B+	B	B	B	B
4.	Sectra PACS	84.0	N/A	n=6	B+	C+	A-	B+	B+	B
5.	Philips Image Management Vue PACS (Carestream)	82.4	-3%	n=9	B+	B+	C+	B	C+	B
6.	INFINITT PACS	76.9	-1%	n=12	C+	C	B-	B-	C+	C+

Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Agfa HealthCare IMPAX [NP]	89.4*	n=3	A-*	B*	A+*	A-*	A*	A+*
GE HealthCare Centricity PACS	69.9*	n=5	C+*	C-*	C+*	C-*	D*	D+*
Medsynaptic Medsynapse PACS [NR]	84.8*	n=4	B+*	A*	B*	B-*	B*	B-*
Philips IntelliSpace PACS [NP]	90.0*	n=4	A-*	A*	B+*	B+*	A-*	A-*
VISUS JiveX (Mostly Europe)	89.7*	n=3	A+*	A*	A+*	B*	–	D*

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional – Insufficient data Definitions can be found on page iii.

PACS Middle East/Africa Continued

Other notable performances in PACS—Middle East/Africa

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?	Keeps all promises?	Part of long-term plans?	Would you buy again?
None	Philips Image Management Vue PACS (Carestream) n=8 **100%**	Agfa HealthCare Enterprise Imaging for Radiology n=13 **100%**	Agfa HealthCare Enterprise Imaging for Radiology n=13 **100%**
		Fujifilm Synapse n=8 **100%**	Fujifilm Synapse n=8 **100%**
		Philips Image Management Vue PACS (Carestream) n=8 **100%**	

Recent Insights

KLAS

Segment Insights

Middle East & Africa PACS 2022

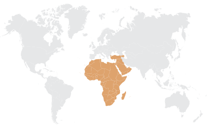
Middle East & Africa PACS 2022

Which Vendors Meet Customer Expectations?

Key Findings:

1. Frequently Considered Agfa HealthCare, Philips & Fujifilm Scale to Large-Volume Clients; PaxeraHealth Has Broadest Geographic Footprint
2. PaxeraHealth Facilitates Consistently Strong Customer Experience across Middle East and Africa
3. Many High-Performing Vendors Offer Strong Technology & Support; GE HealthCare Struggles with Partnership
4. Preliminary Data Shows VISUS, PaxeraHealth Delivering Highly Functional PACS with Strong Support; Customers of INFINITT, Agfa HealthCare Report Inconsistency

Video Conferencing Platforms Middle East/Africa



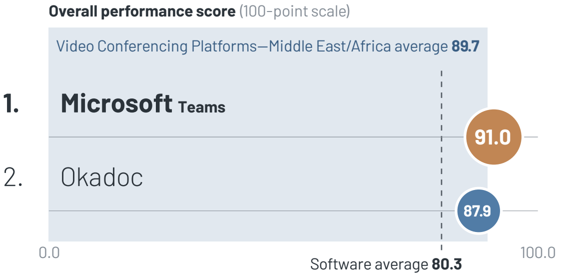
Segment definitions can be found on page 32.

BEST IN KLAS® GLOBAL SOFTWARE 2023

Microsoft

Solution Comparison

Grading methodology can be found on page ii.



	Trend (2022–2023)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
1. Microsoft Teams	+3%	n=9	A-	A+	A	A-	B	A+
2. Okadoc	-4%	n=6	A-	A	B	B	A-	B+

Solutions not ranked Ordered alphabetically

	Overall performance score (100-point scale)	Total evaluations	Customer experience pillars					
			Culture	Loyalty	Operations	Product	Relationship	Value
Neev Tech Labs Connect2MyDoctor	89.7*	n=3	A*	A*	B+*	A-*	A*	B-*
Zoom for Healthcare	92.9*	n=3	A*	A-*	A-*	A+*	–	A+*

*Limited data [C] Component [MS] Limited market share [NP] Not primary [NR] Newly rated [R] Regional – Insufficient data

Other notable performances in Video Conferencing Platforms—Middle East/Africa

Solutions for which at least 95% of respondents answered yes.

Avoids charging for every little thing?

Microsoft Teams	n=7	100%
Okadoc	n=6	100%

Keeps all promises?

Microsoft Teams	n=8	100%
Okadoc	n=5	100%

Part of long-term plans?

Microsoft Teams	n=8	100%

Would you buy again?

Microsoft Teams	n=9	100%
Okadoc	n=6	100%

Video Conferencing Platforms Middle East/Africa Continued

Recent Insights

KLAS

Segment Insights

Middle East & Africa PACS 2022

Middle East Telehealth 2022

A First Look at Virtual Visit Technology

Key Findings:

1. Okadoc's Strong Relationships & Microsoft's Technology Distinguish Them from Group of High-Performing Vendors
2. Limited Data for Neev Tech Labs & Zoom Provides Preliminary Insights into Performance
3. Customers Find Microsoft & Zoom (Limited Data) Often Lack Personal Touch During Implementation & Training
4. How Do EMR Vendors Factor into Virtual Visits?

Make a Connection—Make Healthcare Better

Join us in moving the industry forward

KLAS consistently works to bring together leaders from across healthcare, and we are excited to gather in 2023. Real change can't happen without collaboration. That means getting the right people in the room together.

Upcoming 2023 KLAS Events

Social Determinants of Health Summit
March 20–21, *Snowbird, UT*

Best in KLAS 2023 Awards Show
April 17, *Chicago, IL*

K2 Collaborative Summit
May 9–10, *Salt Lake City, UT*

Global Summit
June 6–7, *Algarve, Portugal*

Arch Collaborative Learning Summit
July 19–21, *Salt Lake City, UT*

Revenue Cycle Management Summit
August 15–16, *Park City, UT*

Digital Health Investment Symposium (DHIS)
September 12–13, *Park City, UT*

Interoperability Summit
October 3–4, *Snowbird, UT*

Patient & Consumer Innovation Summit
November 13–15, *Salt Lake City, UT*

Stay up to date on KLAS events at
klasresearch.com/events

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Segments & Definitions

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Acute Care EMR

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Electronic medical record (EMR) software products used outside the US that provide core inpatient functionality, including a clinical data repository, order entry, results reporting, and/or clinician charting and documentation.

Clinical Portals

- Europe 17

Solutions that facilitate the use of shared patient records at the point of care and aggregate the data for innovative uses (e.g., analytics, population health management).

Digital Pathology

- Europe 18

Imaging solutions pathologists use instead of microscopes for primary diagnoses. Tools help view, measure, and count cellular details and can also include workflow and reporting tools and AI integration. Pathology slide scanners are not included in this segment.

PACS

- Asia/Oceania 19
- Canada 20
- Europe 21
- Latin America 24
- Middle East/Africa 25

Picture archiving and communication system (PACS) software used outside the US that archives digital images and provides a platform for displaying and transmitting images for physician review.

Video Conferencing Platforms

- Middle East/Africa 27

Systems that enable multiple virtual care visit types and offer multiple healthcare workflows, such as virtual waiting rooms, patient check-in, and scheduling. May include physician network services and proprietary equipment. KLAS ratings come from provider and payer organizations.

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Solutions

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