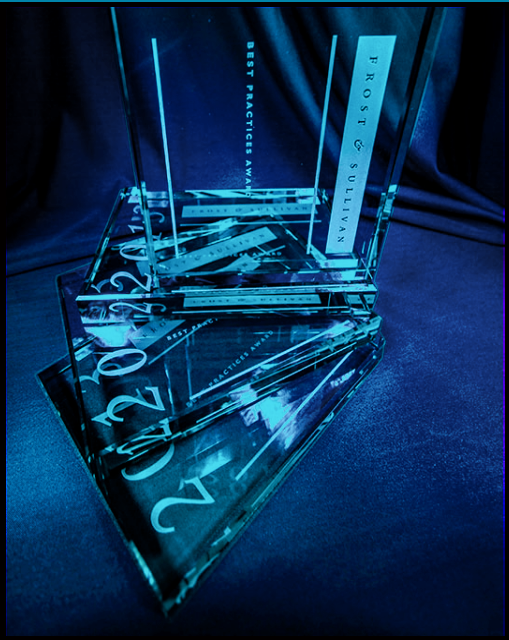


FROST & SULLIVAN



2016 North American
Life Science Research Services
Company of the Year Award



FROST & SULLIVAN

BEST
2016 PRACTICES
AWARD

NORTH AMERICAN
LIFE SCIENCE RESEARCH SERVICES
COMPANY OF THE YEAR AWARD

2016
BEST PRACTICES
AWARDS

Contents

Background and Company Performance	3
<i>Industry Challenges</i>	3
<i>Visionary Innovation & Performance and Customer Impact</i>	3
<i>Conclusion</i>	5
Significance of Company of the Year	6
Understanding Company of the Year	6
<i>Key Benchmarking Criteria</i>	7
Best Practice Award Analysis for GENEWIZ	7
<i>Decision Support Scorecard</i>	7
<i>Visionary Innovation & Performance</i>	8
<i>Customer Impact</i>	8
<i>Decision Support Matrix</i>	9
The Intersection between 360-Degree Research and Best Practices Awards.....	10
<i>Research Methodology</i>	10
About Frost & Sullivan	10

Background and Company Performance

Industry Challenges

The research community often seeks service providers to outsource their life science applications when infrastructure or resources make the work impossible, impractical, or too expensive to conduct in house. Customers trust these service providers as partners in their research. As such, laboratories continue to seek out top service providers that deliver quality results, top-of-class customer service, and are experts in their applications.

To be viewed as a top service provider in the Life Science Research Services industry, companies must keep facilities and in house technologies cutting-edge, expand application capabilities with emerging research trends, and increase value-add service offerings along workflows. They must also treat customers as research partners, deliver on promised services in a timely and high quality manner, and showcase their expertise in the industry they serve. These features can set companies apart from the many global contract research organizations (CROs) that provide services within the Life Sciences space.

Visionary Innovation & Performance and Customer Impact

Strong Brand Equity and Financial Performance

Frost & Sullivan proudly recognizes GENEWIZ as the recipient of the 2016 North America Company of the Year Award for the Life Science Research Services industry. GENEWIZ, headquartered in South Plainfield, NJ, is a genomics service provider, specializing in providing research services utilizing various genomics technologies and techniques. The company serves laboratories across academic, government, pharmaceutical, biotechnology, agriculture, environmental, clean energy, and clinical settings. Founded in 1999, GENEWIZ earned its early stellar reputation as the leading service provider for Sanger capillary electrophoresis sequencing services. To this day, GENEWIZ is the undisputed market leader for these services with a footprint around the world including the largest network of genomics laboratories in the United States, as well as labs in Europe and Asia. While Sanger sequencing usage overall has plateaued in favor of next-generation sequencing (NGS), GENEWIZ remarkably continues to grow its Sanger sequencing services as it gains market share from core facilities. Beyond Sanger sequencing, GENEWIZ has vastly and strategically expanded its service offerings over its 17-year existence. The company now offers services for NGS, gene synthesis, molecular genetics, cloning and mutagenesis, plasmid DNA preparation, and GLP-compliant research and development. GENEWIZ's portfolio spans the gamut of genomics technologies and techniques most sought after in the industry, and positions the company as a leading genomics services provider.

Recent company announcements showcase GENEWIZ's robust growth and the sound strategic best practices it is employing to continue on its strong growth trajectory in the future. For the third year in a row, the company has earned a place on the Inc. 5000 list

of fastest-growing private companies in the US. This year, GENEWIZ has acquired a major competitor, increased its service offerings, expanded throughput capacities to take on more and larger projects, improved in-house technologies, and landed institutional investment backing, all key cornerstones of its growth strategy for 2016 and beyond. For its commitment to providing excellent, cutting-edge services to the research community while greatly expanding its business, GENEWIZ is the ideal recipient of the Frost & Sullivan Company of the Year Award for the Life Science Research Services Industry.

Implementation Best Practices and Addressing Unmet Needs

GENEWIZ has exhibited best-in-class strategy implementation resulting in robust growth and industry success. In December 2015, GENEWIZ announced its acquisition of the genomic services business of Beckman Coulter ("BCG"). With more than 25 years of genomics expertise and a strong portfolio of services including NGS, Sanger sequencing, bioinformatics, and CLIA/clinical, the BCG business was a perfect fit to expand and complement GENEWIZ's existing offerings. This acquisition allowed GENEWIZ to quickly escalate its position in the NGS services market, and added NGS bioinformatics and clinical capabilities to its expertise. Providing a turnkey service offering for the complete NGS workflow, from sample through analysis, is a key strategic move in the market and provides a value-add to GENEWIZ customers. Furthermore, as clinical sequencing emerges more fully over the next decade to become a multi-billion dollar market, GENEWIZ will be positioned with multiple CLIA-certified facilities to take on clinical genomic testing.

As part of its growth strategy to expand project capacity and improve in-house technologies, GENEWIZ announced in April 2016 that it had purchased several new cutting-edge genomics platforms. This includes Illumina's HiSeq X Ten sequencing platform for whole genomes, which is the highest throughput sequencing system available. The HiSeq X Ten is capable of sequencing more than 18,000 genomes per year at a much-reduced cost per genome. This investment places GENEWIZ among the leading NGS service providers in terms of capacity and capabilities. In addition, GENEWIZ announced the purchase of a PacBio Sequel sequencer for long-read sequencing applications, and a 10x Genomics Chromium to aid in *de novo* genome assembly and single-cell sequencing. These platforms demonstrate GENEWIZ's commitment to maintaining cutting-edge facilities and offering the most sought-after genomics services in the industry. Moreover, GENEWIZ has developed and launched its proprietary offerings in immuno-sequencing and metagenomics testing, and has several capabilities in its development pipeline.

Excellent Customer Ownership Experience and Customer Service Experience

As a genomics services provider, GENEWIZ faces hundreds of competitors globally that offer similar NGS, Sanger sequencing, gene synthesis, and other genomics services. When companies rise to the top of highly competitive and fragmented services markets, it is a

clear indication of customer satisfaction and retention, as customers can easily find other service providers for future projects following bad experiences. GENEWIZ's customers keep coming back, and positive word-of-mouth brand awareness helped the company to first become the market leader for Sanger sequencing services, and now a leader across the genomics industry.

GENEWIZ's ability to expand so successfully over the years is due in part to earning customer trust and respect, and delivering excellent customer service to build customer loyalty. Furthermore, GENEWIZ boasts a tremendous global workforce of more than 700 employees, many with PhDs and years of genomics experience. This technical expertise is highly sought after in the industry, and has allowed GENEWIZ to take on projects for specialty applications, or ones that utilize difficult sample types, which other service providers simply cannot handle. The company also features stellar IT capabilities that provide a best-in-class customer interface, allowing GENEWIZ to integrate and communicate more effectively with the customer from order intake to laboratory information management tracking to data reporting. From sample submission to data delivery, most information is managed online and interfaced with the customer, providing the critical communication to support the customer most effectively.

Most of the world's top pharmaceutical/biotechnology companies now outsource work to GENEWIZ, a testament to the company's excellent reputation in the industry and ability to serve as a trusted partner to the most elite research institutions globally. GENEWIZ exhibits all of the characteristics of the ideal service provider; the technical expertise, range of service offerings, cutting-edge technologies and techniques, fast turnaround times, excellent customer service, proprietary protocols, and value-added advantages that all serve to enhance the customer experience.

Conclusion

In conclusion, Frost & Sullivan independent analysis hails GENEWIZ as leader within the Life Science Research Services industry. The company's strategic moves are paying off in the rapidly-growing genomics services space. GENEWIZ continues to reinvest in itself and expand its infrastructure, geographies, and customer channels. Its recent acquisition of Beckman Coulter Genomics and purchase of multiple new genomics platforms demonstrates the company's commitment to growth and remaining a cutting-edge service provider. These actions have expanded GENEWIZ's global reach and ability to capture even greater market share in this competitive market. For its commitment to excellence and company growth, Frost & Sullivan is pleased to present the 2016 Company of the Year Award for the Life Science Research Services Industry to GENEWIZ.

Significance of Company of the Year

To receive the Company of the Year Award (i.e., to be recognized as a leader not only in your industry, but among your non-industry peers as well) requires a company to demonstrate excellence in growth, innovation, and leadership. This kind of excellence typically translates into superior performance in three key areas: demand generation, brand development, and competitive positioning. These areas serve as the foundation of a company's future success and prepare it to deliver on the two criteria that define the Company of the Year Award (Visionary Innovation & Performance and Customer Impact).



Understanding Company of the Year

As discussed above, driving demand, brand strength, and competitive differentiation all play a critical role in delivering unique value to customers. This three-fold focus, however, must ideally be complemented by an equally rigorous focus on visionary innovation to enhance customer value and impact.

Key Benchmarking Criteria

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated two key factors—Visionary Innovation & Performance and Customer Impact—according to the criteria identified below.

Visionary Innovation & Performance

- Criterion 1: Addressing Unmet Needs
- Criterion 2: Visionary Scenarios Through Mega Trends
- Criterion 3: Implementation Best Practices
- Criterion 4: Blue Ocean Strategy
- Criterion 5: Financial Performance

Customer Impact

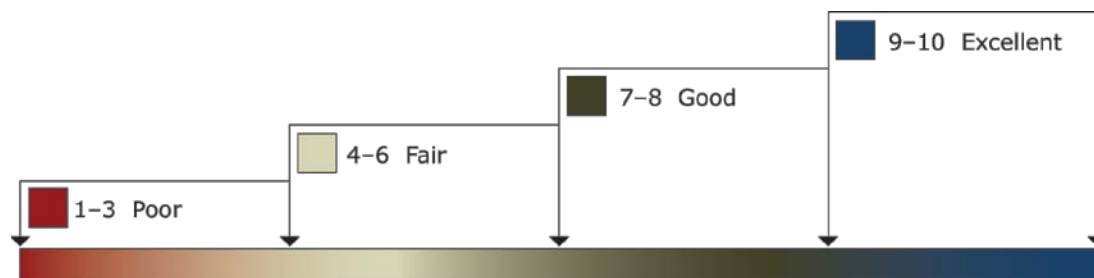
- Criterion 1: Price/Performance Value
- Criterion 2: Customer Purchase Experience
- Criterion 3: Customer Ownership Experience
- Criterion 4: Customer Service Experience
- Criterion 5: Brand Equity

Best Practice Award Analysis for GENEWIZ

Decision Support Scorecard

To support its evaluation of best practices across multiple business performance categories, Frost & Sullivan employs a customized Decision Support Scorecard. This tool allows our research and consulting teams to objectively analyze performance, according to the key benchmarking criteria listed in the previous section, and to assign ratings on that basis. The tool follows a 10-point scale that allows for nuances in performance evaluation; ratings guidelines are illustrated below.

RATINGS GUIDELINES



The Decision Support Scorecard is organized by Visionary Innovation & Performance and Customer Impact (i.e., the overarching categories for all 10 benchmarking criteria; the definitions for each criteria are provided beneath the scorecard). The research team confirms the veracity of this weighted scorecard through sensitivity analysis, which confirms that small changes to the ratings for a specific criterion do not lead to a significant change in the overall relative rankings of the companies.

The results of this analysis are shown below. To remain unbiased and to protect the interests of all organizations reviewed, Frost & Sullivan chooses to refer to the other key players as Competitor 2 and Competitor 3.

DECISION SUPPORT SCORECARD: COMPANY OF THE YEAR AWARD

<i>Measurement of 1–10 (1 = poor; 10 = excellent)</i>			
Company of the Year	Visionary Innovation & Performance	Customer Impact	Average Rating
GENEWIZ	9	10	9.5
Competitor 2	4	7	5.5
Competitor 3	6	4	5.0

Visionary Innovation & Performance

Criterion 1: Addressing Unmet Needs

Requirement: Implementing a robust process to continuously unearth customers’ unmet or under-served needs, and creating the products or solutions to address them effectively

Criterion 2: Visionary Scenarios Through Mega Trends

Requirement: Incorporating long-range, macro-level scenarios into the innovation strategy, thereby enabling “first to market” growth opportunities solutions

Criterion 4: Implementation of Best Practices

Requirement: Best-in-class strategy implementation characterized by processes, tools, or activities that generate a consistent and repeatable level of success.

Criterion 3: Blue Ocean Strategy

Requirement: Strategic focus in creating a leadership position in a potentially “uncontested” market space, manifested by stiff barriers to entry for competitors

Criterion 5: Financial Performance

Requirement: Strong overall business performance in terms of revenues, revenue growth, operating margin and other key financial metrics

Customer Impact

Criterion 1: Price/Performance Value

Requirement: Products or services offer the best value for the price, compared to similar offerings in the market

Criterion 2: Customer Purchase Experience

Requirement: Customers feel like they are buying the most optimal solution that addresses both their unique needs and their unique constraints

Criterion 3: Customer Ownership Experience

Requirement: Customers are proud to own the company’s product or service, and have a positive experience throughout the life of the product or service

Criterion 4: Customer Service Experience

Requirement: Customer service is accessible, fast, stress-free, and of high quality

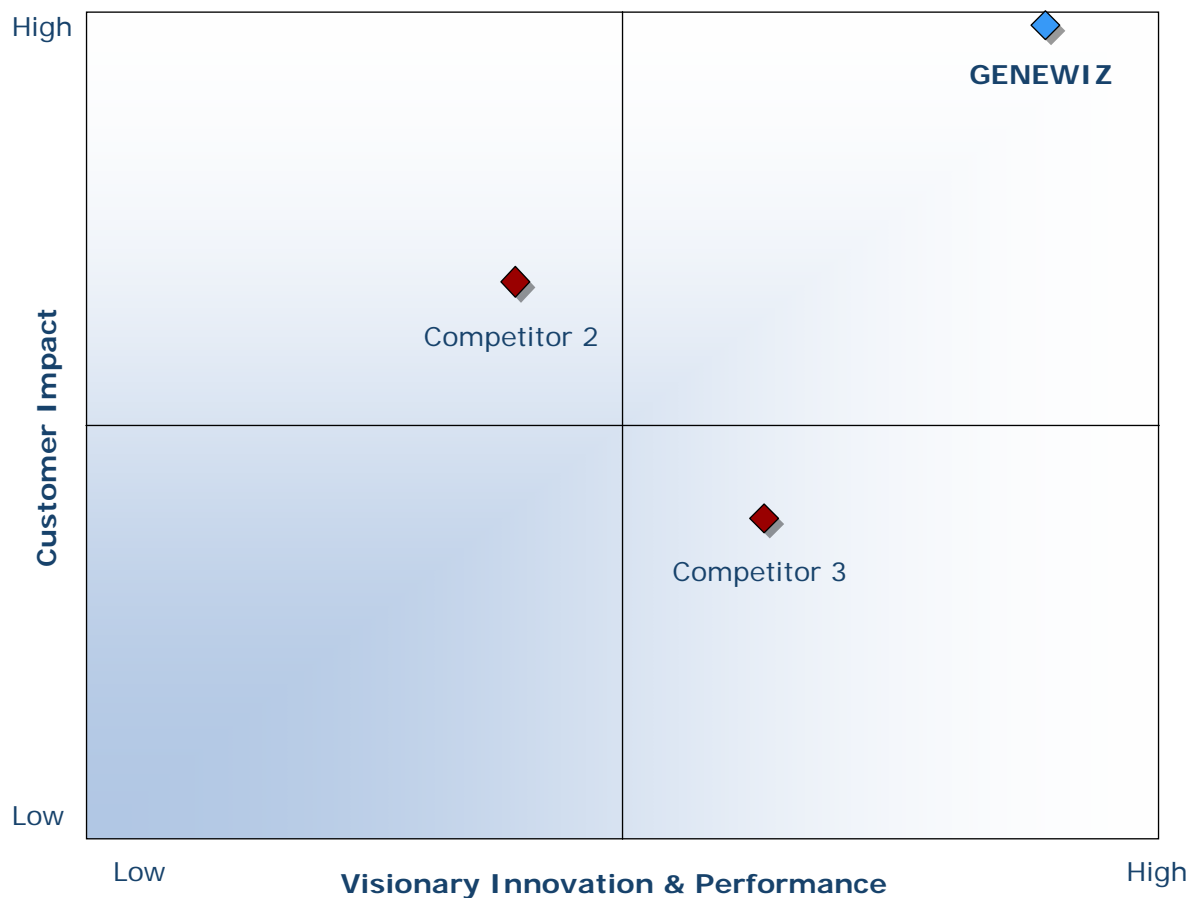
Criterion 5: Brand Equity

Requirement: Customers have a positive view of the brand and exhibit high brand loyalty

Decision Support Matrix

Once all companies have been evaluated according to the Decision Support Scorecard, analysts can then position the candidates on the matrix shown below, enabling them to visualize which companies are truly breakthrough and which ones are not yet operating at best-in-class levels.

DECISION SUPPORT MATRIX: COMPANY OF THE YEAR AWARD



The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan's 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.

360-DEGREE RESEARCH: SEEING ORDER IN THE CHAOS



About Frost & Sullivan

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