

ZIMMER BIOMET INDIA — COMPETITIVE INTELLIGENCE 2026

Ortho Robotics Battlefield Analysis

ROSA vs. VELYS vs. Mako vs. CORI — Recon Platform Differentiation

ROSA + OptimiZe

J&J VELYS

Stryker Mako

S+N CORI

Source: Official product websites — JnJMedTech.com | Stryker.com | Smith-Nephew.com | ZimmerBiomet.com | October 2026

Platform Architecture Overview

Four global robotic systems — how they differ at the core

ZIMMER BIOMET

ROSA Knee + Optimize

CT-Free Arm-Assisted

IMAGE	No CT required — bone morphing technology
LANDMARK	90 anatomical landmarks
PROCEDURE	TKA (primary); expanding
ALIGNMENT	MA, KA, FA, Inverse KA — only automated KA
IMPLANT	Persona Knee System (market leader)
DIGITAL	ZBEdge Analytics + mymobility + 5yr Warranty

J&J DEPUY SYNTHES

VELYS Robotic-Assisted

CT-Free Arm-Assisted

IMAGE	No CT — PURESIGHT optical reflectors
LANDMARK	Bone morphing (ADAPTIVE Tracking)
PROCEDURE	TKA + UKA (unicompartmental)
ALIGNMENT	MA, KA, FA, Inverse KA — PROADJUST Planning
IMPLANT	ATTUNE Knee + SIGMA HP Partial
DESIGN	Bed-mounted compact design; no cutting blocks

STRYKER

Mako SmartRobotics

CT-Based Arm-Assisted

IMAGE	Pre-op CT required — 3D virtual model
LANDMARK	CT-based 3D virtual anatomy (36 CT points)
PROCEDURE	TKA, THA, PKA, Spine, Shoulder (5 types)
ALIGNMENT	Functional Knee Positioning — 3D only
IMPLANT	Triathlon Knee + multi-specialty
SCALE	2.5M+ procedures 47 countries 800+ studies

SMITH + NEPHEW

CORI Surgical System

CT-Free Handheld

IMAGE	Image-agnostic (CT optional) — smart mapping
LANDMARK	Intraoperative 3D smart joint mapping
PROCEDURE	TKA, UKA, Revision TKA (1st in US), THA nav
ALIGNMENT	MA, KA — real-time planning intraoperatively
IMPLANT	JOURNEY II + LEGION Revision Knee
DESIGN	Portable handheld; smallest OR footprint

Feature-by-Feature Comparison

Key differentiators across the four competing robotic platforms for TKA in India

Parameter	ROSA + OptimiZe (ZB)	VELYS (J&J)	Mako (Stryker)	CORI (S+N)
PRE-OP CT SCAN	Not required	Not required	Required (adds cost + radiation)	Optional (image-agnostic)
LANDMARK COUNT	90 anatomical landmarks	Bone morphing (optical)	CT 3D virtual model	Intra-op smart mapping
ALIGNMENT OPTIONS	MA, KA, FA, IKA — automated KA (only robot)	MA, KA, FA, IKA via PROADJUST	Functional Knee Positioning (3D)	MA, KA (real-time)
SOFT TISSUE	Active Track — no bone pinning needed	ACCUBALANCE Graph balancing	Digital Tensioner + AccuStop haptic	Intra-op gap balancing
PROCEDURE SCOPE	TKA (primary)	TKA + UKA	TKA, THA, PKA, Spine, Shoulder	TKA, UKA, Revision, THA nav
DIGITAL ECOSYSTEM	ZBEdge Analytics + mymobility + 5yr Warranty	J&J Institute + evidence library	Stryker Training Academy	S+N Academy Online
GLOBAL EVIDENCE	Growing (FDA cleared Nov 2025)	Multiple clinical studies	800+ publications; 2.5M+ cases	Multiple cadaver + clinical studies
INDIA MARKET	GCC built in India — long-term commitment	Strong (DePuy network, 9 CSRs)	Strong competitor, large installed base	Limited presence

ROSA Competitive Advantages — What Sets Us Apart

Evidence-based differentiators and objection-handling scripts for the sales team

ROSA + OPTIMIZE — UNIQUE ADVANTAGES

- 1 90 Anatomical Landmarks** **vs Mako**
ROSA uses 90 anatomical landmarks with CT-free bone morphing vs Mako's 36 CT-based reference points — more intra-op data points without radiation cost.
- 2 Only Automated KA in the World** **vs All**
OptimiZe Kinematic Alignment is the industry's ONLY automated KA feature — resurfaces the knee to its pre-arthritic position with no manual input.
- 3 46% Faster Planning** **vs All**
OptimiZe Planning reduces average planning time by 46% via customised surgeon profiles — highest OR efficiency in the category.
- 4 No Pre-Op CT Required** **vs Mako**
Eliminates CT scan cost, scheduling delay, and radiation exposure — significant advantage in price-sensitive Indian market.
- 5 5-Year Warranty + mymobility** **vs All**
Industry-first 5-year comprehensive warranty with ROSA Optimize + mymobility digital care — no competitor offers this bundle.

OBJECTION HANDLING SCRIPTS

"Mako has 2.5 million cases and 800 studies — ROSA can't match that."

Response: Mako's volume is real, but it requires a CT scan for every patient — adding Rs 8,000–15,000 in cost and 7–10 days of delay per case. ROSA delivers the same precision with 90 landmarks, no CT, and the only automated KA in the market. Clinical outcomes are now comparable with growing evidence.

"VELYS also covers TKA + UKA — ROSA is limited."

Response: ROSA is optimised for the highest-volume procedure — TKA. OptimiZe Planning, automated KA, and Active Track are differentiated features VELYS does not offer. The Persona Knee is also the fastest-growing TKA implant globally.

"CORI is handheld and portable — easier to use."

Response: CORI's handheld design is newer and still building evidence. ROSA's 5-year warranty ecosystem, mymobility patient app, and ZBEdge Analytics create a total care package that a handheld system cannot replicate.

"Why should we choose ZB — you have fewer CSRs?"

Response: We are actively addressing coverage gaps (target: 8–10 CSRs). ZB's GCC built in India demonstrates a long-term commitment unmatched by any competitor — ROSA Optimize is a direct India-market investment.

India Competitive Battlefield — ROSA vs. The Market

Threat assessment and ROSA sales priorities for Indian Key Accounts and Corporate Hospitals

Stryker Mako — PRIMARY Threat

Threat Level: HIGH — Strong brand + volume

- Largest India installed base — Apollo, Fortis references
- Multi-specialty (TKA+THA+Spine) — single vendor pitch
- 800+ studies — surgeon community trust
- Weakness: CT required (cost+delay); no 5yr warranty
- Counter: ROSA 90 landmarks; no CT; automated KA; 46% faster planning

J&J VELYS — MAJOR Threat

Threat Level: HIGH — DePuy field strength (9 CSRs)

- 9 CSRs in India vs ZB 2 CSRs — coverage advantage
- TKA + UKA coverage; ATTUNE brand legacy
- Compact bed-mounted design — smaller OR footprint
- Weakness: No automated KA; no 5yr warranty ecosystem
- Counter: ROSA automated KA; Active Track; mymobility bundle

S+N CORI — EMERGING Threat

Threat Level: MEDIUM — Limited India presence

- First revision knee robot in US — clinical differentiation
- Handheld design appeals to newer, smaller hospitals
- Weakness: Limited India installed base; no full ecosystem
- Counter: ROSA's proven arm-assisted accuracy; full ZBEdge Analytics + mymobility + warranty

Priority Sales Actions — Corporate Hospitals

- Apollo / Fortis / Max / Manipal: Lead with ROSA Optimize no-CT advantage + cost per case vs Mako
- Quantify CT cost savings: Rs 8,000–15,000 per case at 100 cases/year = Rs 8–15 lakhs saved annually
- Position 5-year warranty + mymobility as patient satisfaction differentiator
- Use GCC India commitment narrative — "Your robot is serviced from India, not abroad"

Priority Sales Actions — Surgeon KOLs

- Demonstrate automated KA — no competitor offers this; position as future of alignment science
- OptimiZe Landmarking: show variability reduction data vs manual landmark marking
- Leverage ZBEdge Analytics for KOL research publications — build India evidence base
- Active Track demonstration: cut without pinning — show ergonomic and time advantage

Immediate Field Priorities (30 Days)

- Prepare ROSA vs Mako cost-per-case comparison sheet (with CT cost included)
- Create ROSA vs VELYS surgical feature comparison for surgeon detailing
- Train all Recon CSRs on automated KA objection handling script
- Share this competitive intelligence deck at next National Sales Meeting

Key Message: ROSA + OptimiZe is the only robot with automated KA, no CT requirement, 90 anatomical landmarks, and a 5-year warranty — India's most comprehensive robotic TKA package.