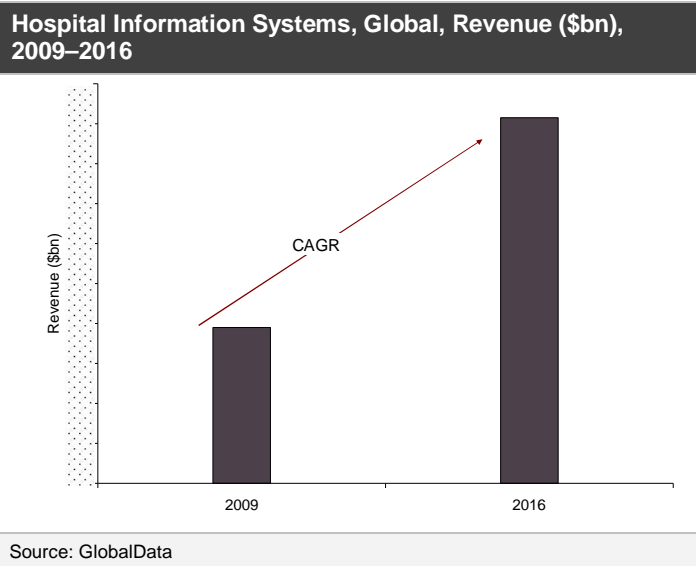


Global Hospital Information Systems (HIS) Opportunity Assessment, Competitive Landscape and Market Forecasts to 2016

Reference Code: **GDME0005MAR**Publication Date: **May 2010**

The Global Hospital Information Systems Market is forecast to exceed \$18 Billion in 2016



The global Hospital Information Systems (HIS) market was valued at \$XX billion in 2009 and is forecast to reach \$XX billion in 2016 after growing at Compound Annual Growth Rate (CAGR) of XX% from 2009. The growth in the market is primarily driven by government initiatives, hospitals trying to increase workflow efficiency and reimbursements provided by governments. Overall, hospitals strongly believe that adopting HIS will greatly increase its efficiency and reduce medical errors, thus improving patient's safety and quality of care. The Electronic Medical Records (EMR) segment is the largest segment in the HIS market valued at \$XX billion in 2009 and is expected to grow at a CAGR of XX% over the next seven years. Practice management was valued at \$XX billion in 2009, and is the second largest segment, growing at a CAGR of XX% over the next seven years. Computerized Physician Order Entry (CPOE), Pharmacy Information Systems (PIS) and Laboratory Information Systems (LIS) will grow at a CAGR of XX%, XX% and XX% respectively.

Over the past decade, the political impetus for change in almost all western countries has become stronger and stronger. Evidence has increasingly shown that the current systems are not delivering sufficiently safe, high quality, efficient and cost effective healthcare and that computerization, with EMR at the

centre, is effectively the only way forward. As a result, physicians and healthcare organizations around the world are now looking to adopt more EMR technologies and major companies in the market are vying for various collaborations to reach office-based physicians.

Governments in Australia, Canada, Denmark, Finland, France, New Zealand, the UK, the US and other countries have announced and are implementing plans to build integrated computer-based national healthcare infrastructures based around the deployment of interoperable EMR systems. Many of these countries aim to have EMR systems deployed for their populations within the next XX years.

The US Market is expected to be the Fastest Growing Market for Hospital Information Systems from 2009 to 2015

The HIS market in the US was valued at \$XX billion in 2009 and is expected to grow at a CAGR of XX% over the next seven years.

The economic stimulus provided by the ARRA (American Recovery and Reinvestment Act) will increase the adoption rates to XX% for physicians and XX% for hospitals in the US. The ARRA, signed into law by President Obama on February 17th 2009, has allocated \$XX billion towards health IT (Information Technology). The ARRA promises financial incentives to providers and hospitals for the meaningful use of certified healthcare IT products. Under the provisions of ARRA, incentive payments made to physicians and hospitals are expected to significantly increase the uptake of certified healthcare IT systems, according to an analysis from the Congressional Budget Office (CBO). Under the ARRA, the CBO estimates that, by 2019, XX% of physicians and XX% of hospitals will have adopted certified healthcare IT systems. Before 2009, HIS adoption rates stood at only XX%, with private hospitals being the only market for vendors in the US. The government stands to gain by the reduction of medical errors, reduced adverse event related costs and improved the overall healthcare system by bringing workflow efficiency and accountability. This change to improve efficiency throughout the healthcare systems and improve patient safety came in 2004 with President Bush's federal initiative to establish Electronic Health Records (EHR) for all Americans by 2014.

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3.2 Global Hospital Information Systems Market, Global, Revenue Forecast (\$m), 2009 – 2016

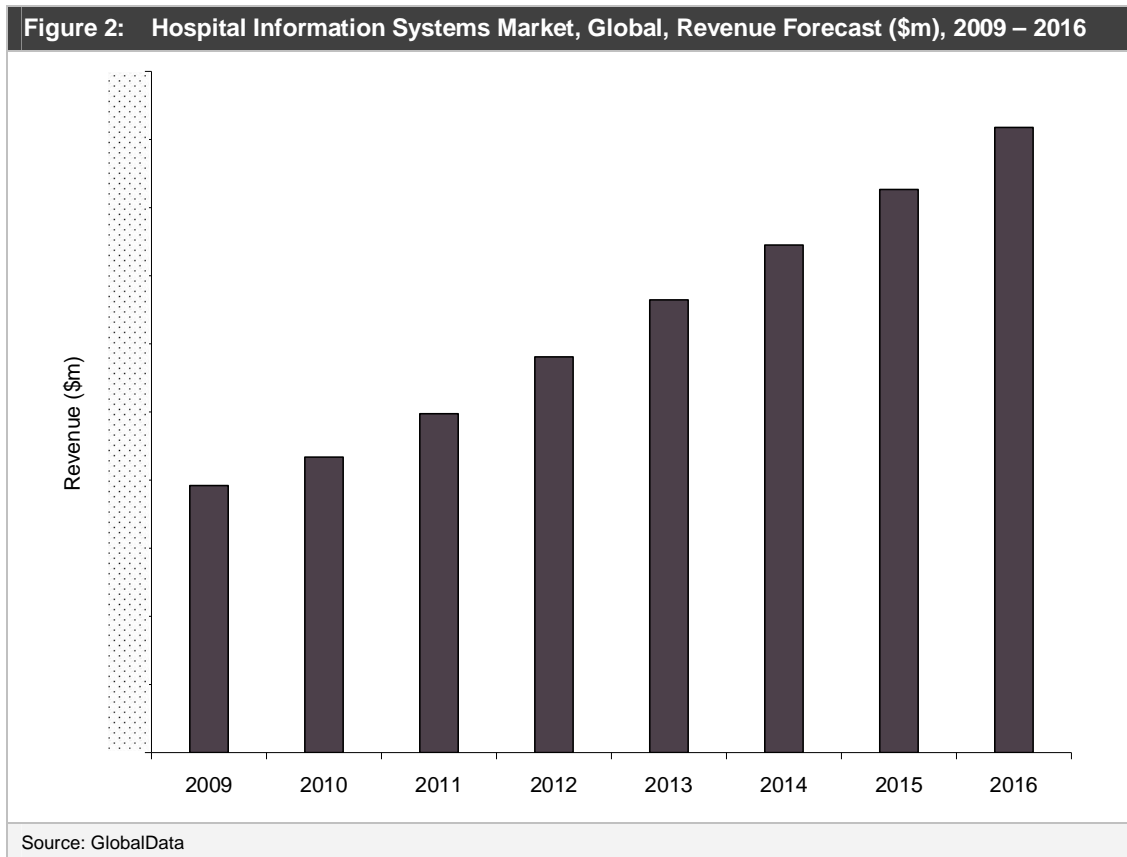


Table 2: Hospital Information Systems Market, Global, Revenue Forecast (\$m), 2009-2016

Segment	2009	2010	2011	2012	2013	2014	2015	2016	CAGR 2009-2016
Hospital Information Systems	~10	~12	~15	~18	~22	~28	~35	~45	~15%

Source: GlobalData

The global market for hospital information systems is forecast to reach \$XX billion in 2016 after growing at a CAGR of XX% from 2009. The ARRA in the US, along with government initiatives for the adoption of HIS in Europe and China, will contribute to a growing demand to install EMR and EHR systems in hospitals. Provisions to reimburse the costs associated with HIS under Medicaid and other offers under provision of the ARRA act will make the US the fastest growing market in the HIS segment. Along with the US, Asian countries like China and India are emerging markets that will adopt HIS to cater for the general population.

5 Global Hospital Information Systems: Cross-Country Market Analysis and Forecasts

5.1 Global Hospital Information Systems Market: Cross-Country Analysis

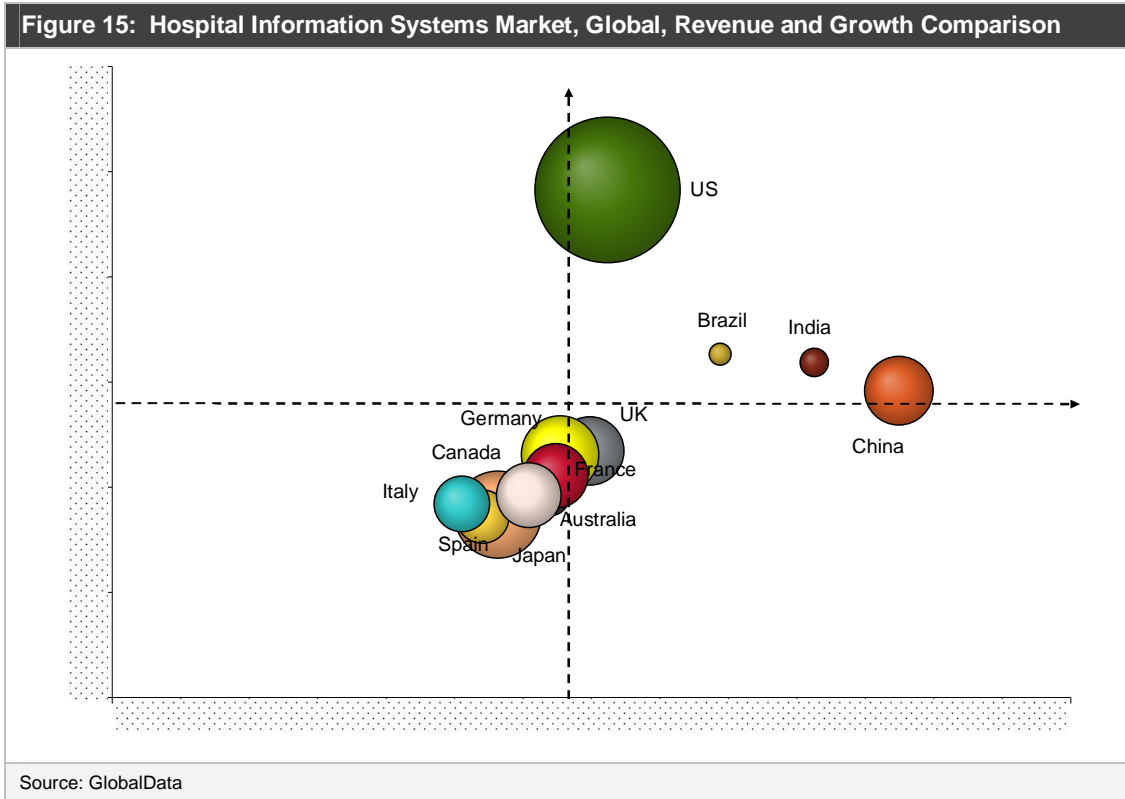


Table 13: Hospital Information Systems Market, Global, Revenue and Growth Comparison

Countries	US	Japan	Germany	China	UK	Canada	France	Italy	Spain	Australia	India	Brazil
Revenue 2009												
CAGR (2009-2016)												

Source: GlobalData

In 2009, the US was the largest market for HIS with revenues of \$XX billion. Over the next seven years it will continue to drive the growth with a high growth rate of XX% followed by the Brazil, India and China with growth rates of XX%, XX% and XX% respectively. The government incentives for the adoption of HIS mixed with the aging population's growing need for hospital care will be the main drivers of the HIS market in the US and China.

6 Global Hospital Information Systems Market: Strategic Competitive Assessment

6.1 Global Hospital Information Systems Market, Key Company Shares (%), 2008

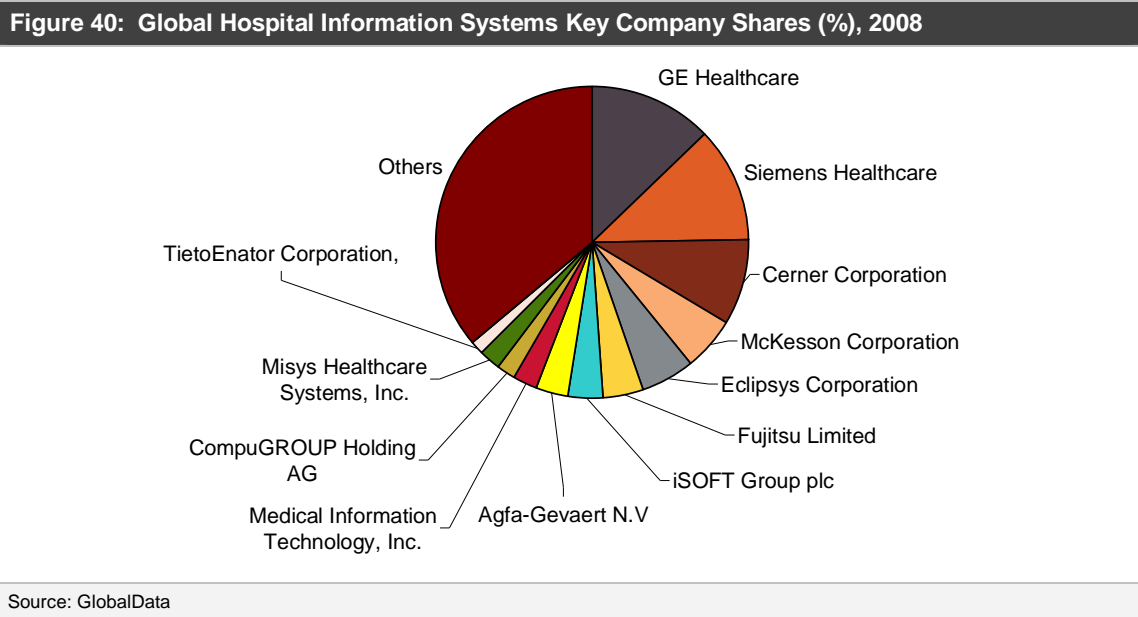


Table 38: Global Hospital Information Systems Key Company Shares (%), 2008

Company	2008 Revenue (\$m)
GE Healthcare	-
Siemens Healthcare	-
Cerner Corporation	-
McKesson Corporation	-
Eclipsys Corporation	-
Fujitsu Limited	-

Source: GlobalData

GE Healthcare and Siemens Healthcare are the two leading companies in the hospital information systems market and together account for 24% of the total market. GE Healthcare is the market leader with 12.9% of the market share, followed by Siemens Healthcare and Cerner Corporation with 11.7% and 8.9% respectively. The GE centricity package of software is the most comprehensive and successful HIS product in the market. It caters to all segments of HIS and therefore avoids the problem of a lack of interoperability between various segments of hospital information systems.

9 Appendix

The data and analysis within this report is driven by the Medical eTrack

The Medical eTrack gives you the key information to drive sales, investment and deal making activity in your business. It includes the following information:

- 12,000+ Market size data tables across 300 medical equipment segments and 37 countries globally with historic data from 2000 forecast to 2015
- 15,000+ Medical equipment companies globally
- 5,000+ Device pipeline products to be launched in future globally
- 6,000+ Device clinical trials
- 200+ Segment level surgical and diagnostic procedures by sector

For more information or to receive a free demo of the service visit

<http://www.medicaletrack.com/contactus.aspx?RD=Demo=>

9.1 Acronyms

ADE: Adverse Drug Events

AE: Adverse Event

ARRA: American Recovery & Reinvestment Act 2009

ASIP sante: Agency for Shared Information Systems on Healthcare (France)

CAGR: Compound Annual Growth Rate

CDSS: Clinical Decision Support System

CFO: Chief Financial Officer

CPOE: Computerized Physician Order Entry

DMP: Dossier Medical Personal

EHR: Electronic Health Record

EMR: Electronic Medical Records

EU: European Union

FTE: Full Time Employee

HIE: Health Information Exchange

HIMSS: Healthcare Information and Management Systems Society

HIPAA: Health Insurance Portability and Accountability Act

HIS: Hospital Information Systems

ICD: International Classification of Diseases

IOM: Institute of Medicine

IT: Information Technology

LIS: Laboratory Information Systems

NHS: National Health Services

NIH: National Institutes of Health

NPfIT: National Policy for Information Technology (UK)

NSIS: National Health Information System (Italy)

OP: Outpatient

PHR: Personal Health Record

PIS: Pharmacy Information System

PMS: Practice Management Systems

SaaS: Software as a Service

US: United States of America

UK: United Kingdom

9.2 Definitions

9.2.1 Hospital Information Systems

Hospital Information Systems (HIS) include software and system applications, used in the administrative and clinical departments of various health care delivery organizations such as hospitals, clinics and emergency centers. A hospital information system is a comprehensive, integrated information system designed to manage the administrative, financial and clinical aspects of a hospital. Hospital information systems include integrated software applications such as electronic medical records, computerized physician order entry and practice management.

9.2.2 Computerized Physician Order Entry

The Computerized Physician Order Entry (CPOE) system is a major component of hospital information systems which allows physicians and other healthcare providers to track the patient medication orders in a structured manner, thereby decreasing the possibility of medication errors.

9.2.3 Electronic Medical Records

Electronic Medical Records (EMR) are used to store and share the patient information in health care organizations, ensuring the privacy and confidentiality of the information with a focus on improving the patient care.

9.2.4 Laboratory Information Systems

Laboratory Information Systems (LIS) are a class of software that receive, process, and store the information generated by medical laboratory processes. LIS are used in inpatient and outpatient settings and are designed to support both. Laboratory Information Systems also facilitate patient check in, order entry, specimen processing, result(s) entry, reporting and patient demographics.

9.2.5 Pharmacy Information Systems

Pharmacy Information Systems include computerized systems that are designed to meet all the information needs within a pharmacy. These devices store, manipulate, and retrieve information for planning, organizing, directing, and controlling administrative activities associated with the provision and utilization of clinical pharmacy services.

9.2.6 Practice Management

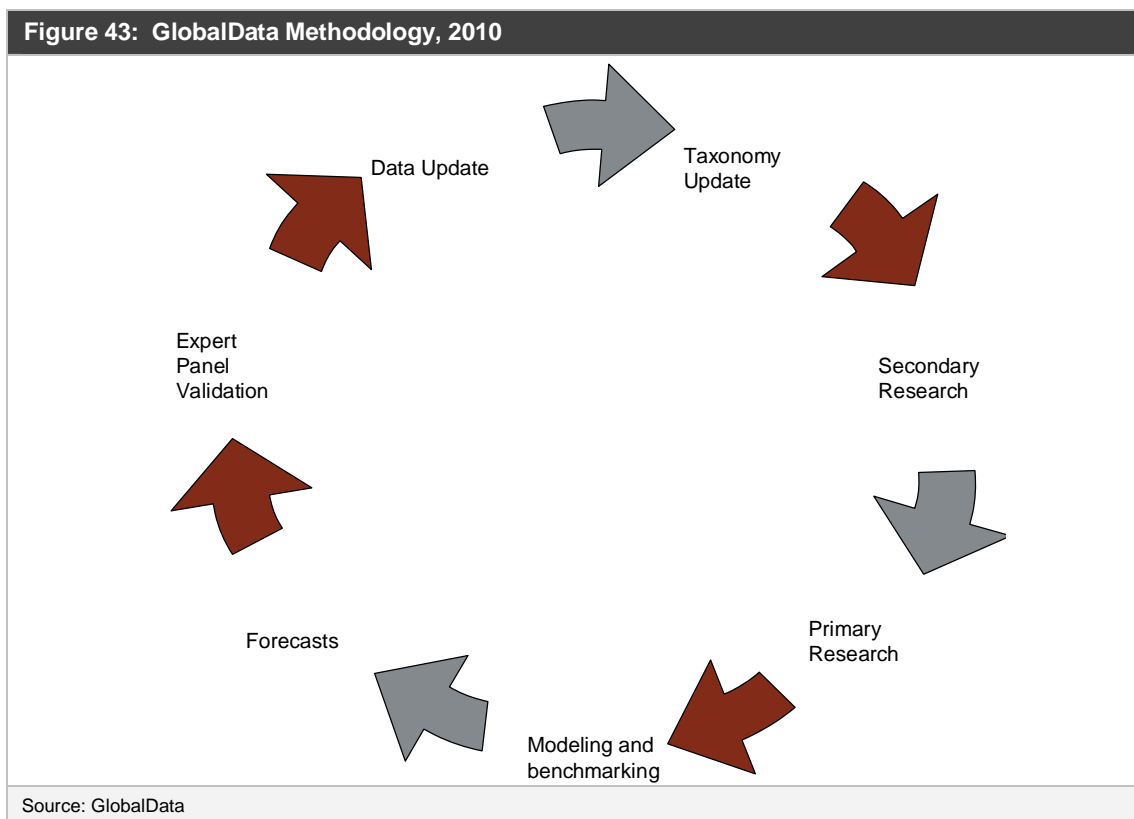
Practice management is a major application of hospital information systems that helps in streamlining the administrative work in a hospital or a clinic. Practice management applications are integrated to electronic medical records in major hospitals and clinics. Practice management includes scheduling, billing and patient demographics.

9.3 Research Methodology

GlobalData's dedicated Research and Analysis Teams consist of experienced professionals with a pedigree in marketing, market research and consulting in the medical devices industry as well as advanced statistical expertise.

GlobalData adheres to the Codes of Practice of the Market Research Society (www.mrs.org.uk) and the Society of Competitive Intelligence Professionals (www.scip.org).

All GlobalData databases are continuously updated and revised. The following research methodology is followed for all databases and reports.



9.4 Secondary Research

The research process begins with exhaustive secondary research on internal and external sources being carried out to source qualitative and quantitative information relating to each market.

The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings.
- Industry trade journals, scientific journals and other technical literature.
- Internal and external proprietary databases.
- Relevant patent and regulatory databases.
- National government documents, statistical databases and market reports.
- Procedure registries.
- News articles, press releases and web-casts specific to the companies operating in the market.

9.5 Primary Research

GlobalData conducts hundreds of primary interviews a year with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- It provides first-hand information on the market size, market trends, growth trends, competitive landscape, future outlook etc.
- Helps in validating and strengthening the secondary research findings.
- Further develops the Analysis Team's expertise and market understanding.

Primary research involves E-mail correspondence, telephone interviews as well as face-to-face interviews for each market, category, segment and sub-segment across geographies.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, marketing/product managers, market intelligence managers and national sales managers.
- Hospital purchasing managers, laboratory personnel, pharmacists, distributors and paramedics.
- Outside experts: investment bankers, valuation experts, research analysts specializing in specific medical equipment markets.
- Key opinion leaders: physicians and surgeons specializing in different therapeutic areas corresponding to different kinds of medical equipment.

9.6 Models

Where no hard data is available GlobalData uses modeling and estimates in order to produce comprehensive data sets. A rigorous methodology is adopted in which the available hard data is cross referenced with the following data types to produce estimates:

- Demographic data: Population split by segment.
- Macro-economic indicators: GDP, inflation rate etc.
- Healthcare Indicators: health expenditure, physicians base, healthcare infrastructure and facilities.
- Selected epidemiological and procedure statistics.

Data is then cross checked by the expert panel. All data and assumptions relating to modeling are stored and are available to clients on request.

9.7 Forecasts

GlobalData uses proprietary forecast models. The following four factors are utilized in the forecast models:

- Historic growth rates
- Macro indicators such as population trends and healthcare spending
- Forecast epidemiological data
- Qualitative trend information and assumptions

Data is then cross checked by the Expert Panel.

9.8 Expert Panels

GlobalData uses a panel of experts to cross verify its databases and forecasts.

GlobalData expert panel comprises marketing managers, product specialists, international sales managers from medical device companies; academics from research universities, KOLs from hospitals, consultants from venture capital funds and distributors/suppliers of medical equipment and supplies etc.

Historic data and forecasts are relayed to GlobalData's Expert Panel for feedback and adjusted in accordance with their feedback.

Details of the make up of the expert panel can be viewed through GlobalData.com, and are available to clients on request.

9.9 GlobalData Consulting

We hope that the data and analysis in this brief will help you make informed and imaginative business decisions. If you have further requirements, GlobalData's consulting team may be able to help you. GlobalData offers tailor-made analytical and advisory services to drive your key strategic decisions. For more information about GlobalData's consulting capabilities, please contact us directly at GlobalData: +1 646 395 5460 or email us at info@globaldata.com

9.10 Contact Us

If you have any queries about this report or would like further information, please contact us via the telephone numbers or email address.

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