

## Electronic Health Records – HCIT – World 2017

Nile Kazimer, Electronic Health Records Lead Market Analyst –  
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### ACTUALS AND FORECAST

#### Frequency, time period

- 5-year annual forecast (2017–2021)
- Base year (2016)

#### Measures

- Revenues
  - Software
  - Services
    - Implementation
    - Maintenance
    - Consulting
- % cloud
- % SaaS

#### Regions, markets

- North America
  - Canada, US
- Latin America
  - Brazil, Mexico, Rest of Latin America
- Western Europe
  - Austria & Switzerland, Benelux, France, Germany, Italy, Nordic Countries, Spain & Portugal, UK & Eire
- E. Europe, Middle East & Africa
  - Africa, Czech Republic, Hungary, Poland, Russian Federation & CIS, Saudi Arabia, Turkey, Rest of Europe, Rest of Middle East
- Asia Pacific
  - Oceania, China, India, Japan, Malaysia, Pakistan, South Korea, Taiwan, Thailand, Rest of Asia Pacific

#### Market share analysis for each major:

- Region (Global, Americas, EMEA, APAC)

### SEGMENTS COVERED

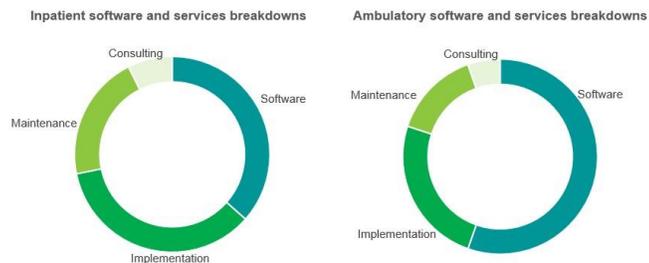
- Inpatient EHR market
- Ambulatory EHR market

### The most granular analysis of the highly fragmented global EHR market

This is the latest edition of the IHS Markit’s report examining the global markets for electronic health records (EHRs). The research is a part of a decade-long healthcare IT coverage within IHS Markit, which comprises of reports on: Medical Enterprise Data Storage (VNA and Image Exchange), EHRs, and Radiology & Cardiology IT (RPACS, RIS, CV-PACS, CVIS).

EHRs have evolved over recent years beyond simply being the digital replacement of patients’ paper charts to become tools that capture holistic, longitudinal view of a patient’s medical history. Today, EHRs have become an integral part of integrated, value-based care and are increasingly being used as a repository of clinical evidence that are crucial to the decision making process in healthcare settings. There remains, however, high degrees of fragmentation within the global market, with numerous dominant local players that do not appear in regional market shares.

The global scope of the report provides a robust and granular coverage of both the inpatient and ambulatory EHR markets. IHS Markit developed this report using a variety of sources, the core of which was 25 extensive primary research interviews. Over 96 EHR companies globally were individually profiled to create a bottom-up estimate of market sizes and shares in addition to interviews with key health policy experts, clinicians, and hospital executives. This research contains in-depth analyses of major trends and factors affecting each region, a SWOT analysis for the top five markets, along with comprehensive market forecasts for 2017 through 2021 for each country segments. The report provides a competitive environment analysis and detailed trend analysis on the following key themes: economic, political & social, public health & epidemiologic, healthcare, EHR, and technology.



#### Key issues addressed

- What was the size of the EHR market in 2016?
- Who are the market leaders in the US, Canada, Brazil, Mexico, UK & Eire, France, Germany, Saudi Arabia, Turkey, Japan, China and Oceania?
- What is the growth forecast for the next five years and why?
- How does the services revenues breakdown by implementation, maintenance, and consulting?
- What is the expected growth rate of cloud usage?

#### Applicable to

- Gain market understanding
- Identify growth opportunities
- Analyse and measure the global EHR market
- Understand the trends that will drive future changes in the EHR market
- Understand the trends in the use of EHR technologies
- Understand the global competitive landscape

## Companies included in the market assessment by primary geographic presence

Global (presence in >1 region)	Americas	
<ul style="list-style-type: none"> <li>• AGFA*</li> <li>• ALERT Life Sciences</li> <li>• Allscripts*</li> <li>• Athenahealth*</li> <li>• Atomic Information Systems</li> <li>• Cambio Healthcare Systems</li> <li>• Cerner*</li> <li>• CompuGroup Medical</li> <li>• Cristal-Net</li> <li>• CSC (DXC Technologies) *</li> <li>• eClinicalWorks*</li> <li>• Epic*</li> <li>• GE</li> <li>• IMS Maxims</li> <li>• InterSystems Corporation*</li> <li>• McKesson*</li> <li>• Meditech*</li> <li>• Neusoft</li> <li>• Nexus AG*</li> <li>• NoemaLife S.p.A (Medasys DxCare)</li> <li>• Philips</li> <li>• Tieto*</li> <li>• Wipro</li> </ul>	<ul style="list-style-type: none"> <li>• 4 Medica</li> <li>• AdvancedMD</li> <li>• Allmeds</li> <li>• Amazing Charts</li> <li>• Aprima Medical Software</li> <li>• Bizmatics</li> <li>• CareCloud</li> <li>• ChartLogic</li> <li>• Clinicom</li> <li>• CPSI</li> <li>• CureMD</li> <li>• DrChrono</li> <li>• e-MDs</li> <li>• Eyefinity</li> <li>• Greenway Health*</li> <li>• Health Fusion</li> <li>• Henry Schein</li> <li>• Kareo</li> <li>• Konica Minolta (Viztek)</li> <li>• Medhost</li> <li>• Meditab</li> <li>• Medsphere</li> </ul>	<ul style="list-style-type: none"> <li>• Microfour</li> <li>• MV Sistemas</li> <li>• NexGen Healthcare*</li> <li>• Nextech</li> <li>• Nightingale Informatix</li> <li>• Practice Fusion</li> <li>• Praxis</li> <li>• Quest Diagnostics</li> <li>• Sequel Med</li> <li>• SIS</li> <li>• SRS Health</li> <li>• Streamline MD</li> <li>• Telus Health</li> <li>• TOTVS</li> <li>• WRS Health</li> </ul>
EMEA	APAC	
<ul style="list-style-type: none"> <li>• Berger-Levrault Sigems</li> <li>• Cejedem</li> <li>• ChipSoft</li> <li>• Clevermed</li> <li>• Dedalus</li> <li>• EMIS Health</li> <li>• Fonet</li> <li>• HSS Euroking</li> <li>• IASI</li> <li>• i-solutions</li> <li>• Kardelen</li> <li>• Maincare Solutions</li> <li>• Malta Informatique-Axigate</li> <li>• Meierhofer</li> <li>• Meona</li> <li>• Microtest</li> <li>• OSM Gruppe</li> <li>• PlanOrg Informatik GmbH</li> <li>• Probel</li> <li>• SAP AG</li> <li>• Servelec Group</li> <li>• Sisoft</li> <li>• Softway Medical</li> <li>• System C</li> <li>• Telekom Healthcare</li> <li>• TPP</li> <li>• Web 100T</li> </ul>	<ul style="list-style-type: none"> <li>• Fujitsu*</li> <li>• NEC*</li> <li>• Nihon Kohden*</li> <li>• NTT Data*</li> <li>• Tata Consultancy Services</li> <li>• Tianjin source Technology Group</li> </ul>	

\* Denotes companies that appear in the market share tables

For more information  
[ihsmarkit.com/technology](http://ihsmarkit.com/technology)

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### About IHS Markit

IHS Markit (Nasdaq: INFO) is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 key business and government customers, including 85 percent of the Fortune Global 500 and the world's leading financial institutions. Headquartered in London, IHS Markit is committed to sustainable, profitable growth.

## LEAD ANALYST

### Nile Kazimer – Lead Market Research Analyst, Electronic Health Records

Nile is a market Analyst specializing in healthcare IT. She holds a Master of Public Health with a certificate in Public Health Informatics from Columbia University, New York, and a Bachelor's in Public Health from the University of California, Berkeley.

Nile has experience working in biostatistics, clinical workflow analysis, epidemiology, and clinical informatics. She is also the lead analyst on IHS Markit report on Radiology and Cardiology IT.

## ABOUT IHS TECHNOLOGY HEALTHCARE TECHNOLOGY

The Healthcare Technology group at IHS is part of IHS Technology. The group is an international supplier of high quality and in-depth market research to the medical devices industry, providing market research and consultancy services on a diverse range of products and applications.

The group produces established reports on medical imaging, including ultrasound and X-ray; clinical care devices; cardiology devices; and respiratory care, healthcare IT and digital health devices.

The Healthcare Technology team's insightful analysis, based on a rigorous primary research method, provides a thorough assessment of the current status of these markets, and forecasts the impact of important trends over the coming years. The team also offers a series of Customer Insight reports and census databases that include detailed information on the use of medical technologies.

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