



COCIR eHEALTH MARKET INTELLIGENCE CENTER

RELIABLE MARKET INFORMATION
TO DRIVE YOUR SALES STRATEGIES

APRIL 2013

COCIR IS THE LEADING VOICE OF THE eHEALTH INDUSTRY IN EUROPE

COCIR is the leading industry association for eHealth in Europe, established since 1959. COCIR is the unique industry association at the European level which includes industries from key sectors such as medical imaging, Health ICT and electromedical. In February 2007, COCIR opened a Desk in Beijing to strengthen its presence and support for its members in China.

COCIR provides member companies with reliable data at negotiated rates and market intelligence on two market segments to drive strategic business decisions in these increasingly competitive and fragmented sectors. Since 2008, COCIR collects statistics and gathers intelligence on the Imaging IT and Hospital IT markets.

1. HOSPITAL IT

1. eHOSPITAL CENSUS

COCIR works with HIMSS Analytics Europe (HAE) to collect statistics on the eHealth market in Europe.

OUR DATA COLLECTION FOCUSES ON:

- Level of equipment of hospitals in eHealth (called *installed based* in our jargon)
- Average age of eHealth equipments in hospitals (called *age profile* in our jargon)
- Planned investments for eHealth
- Market share per company and per product

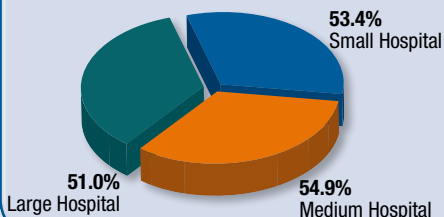
Data for some 45+ eHealth applications in various countries is collected. The data is compiled and presented in country reports bought by COCIR for the benefit of its members.

- **SOLUTIONS COVERED:** Various Administrative Information Systems (IS) (e.g. ADT, patient scheduling, MPI, business intelligence, supply chain & logistics, human resource), Various Clinical IS (e.g. electronic patient record, CPOE, document management IS, Operating Theater, ICU, Cardiology IS, Oncology IS) and Ancillary IS such as Laboratory IS, Radiology IS, Pharmacy IS.
- **GEOGRAPHIC COVERAGE:** Western Europe, Eastern Europe and Middle East
- **METHODOLOGY:** COCIR mandates HIMSS Analytics Europe (HAE) to collect data from acute care hospitals on: installed base, vendor market share, age profile, investment plans, ICT strategy & budget, drivers for ICT deployment, integration standards as well as a market forecasting tool.

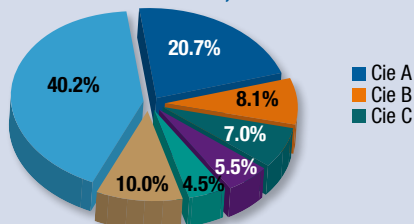
COCIR PARTICIPATING COMPANIES: Agfa HealthCare, GE Healthcare, Philips Healthcare, Siemens Healthcare.

EXAMPLE ON DATA COLLECTED ON EPR IN COUNTRY X

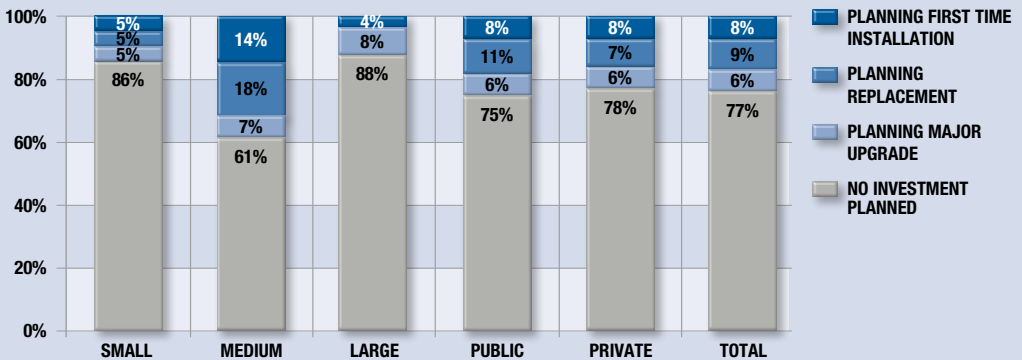
% OF EQUIPPED HOSPITALS



VENDOR MARKET SHARES, % OF INSTALLATIONS



INVESTMENT PLANS (% OF INSTITUTIONS)



2. A MULTI-COUNTRY COMPARISON TOOL

A TREND-SCOUTING COMPARISON OF THE IT LANDSCAPE AMONGST DIFFERENT COUNTRIES:

In addition, COCIR is also buying the access to a tool created by HIMSS Analytics Europe (HAE) - the Country Comparison Tool (CCT) – which automatically organizes the data collected and allows a country by country comparison by eHealth application.



Installed Base Comparison based on MPU*

Please select countries:

Germany
Italy
Poland
Portugal
Saudi Arabia
Spain
United States

[Click here to view short description!](#)

Installed Base based on Market Potential Universe in % - by Country

Clinical Information Systems

Electronic Medical Record / Electronic Patient Record

Chronic Disease Management System (CDMS)	13,3%	16,4%	3,1%	21,2%	41,8%	15,4%	n/a
Clinical Decision Support (CDSS)	44,5%	8,0%	0,9%	24,4%	58,6%	55,8%	90,4%
Clinical Workflow Management System	22,2%	22,7%	2,3%	53,3%	41,4%	43,3%	n/a
Computerized Practitioner Order Entry (CPOE)	49,3%	50,1%	18,2%	38,6%	57,6%	75,7%	69,1%
Electronic Patient Record/Clinical Data Repository	88,5%	53,6%	51,7%	93,5%	71,7%	90,2%	92,5%
ePrescribing	34,8%	35,1%	7,6%	47,9%	68,1%	54,3%	n/a
Order Entry (Includes Order Communications)	79,3%	68,4%	19,3%	89,4%	78,9%	80,3%	93,8%
Physician Documentation	95,1%	35,0%	9,8%	92,1%	67,5%	89,3%	62,2%
Physician Portal	19,4%	31,0%	0,8%	5,3%	35,2%	64,6%	51,7%

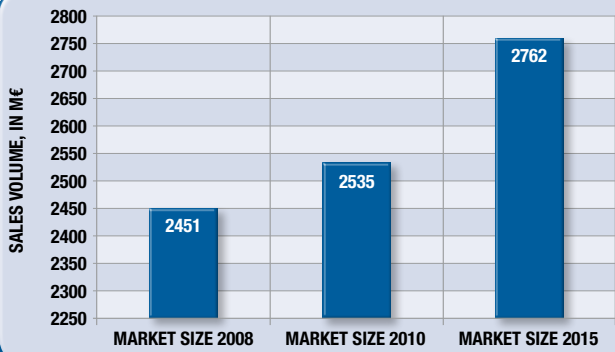
HIMSS Analytics Europe is a wholly-owned subsidiary of the Healthcare Information and Management Systems Society (HIMSS). HIMSS Analytics Europe collect and analyse healthcare information related to IT processes and environments, products, and healthcare trends.

3. COCIR MARKET ESTIMATES

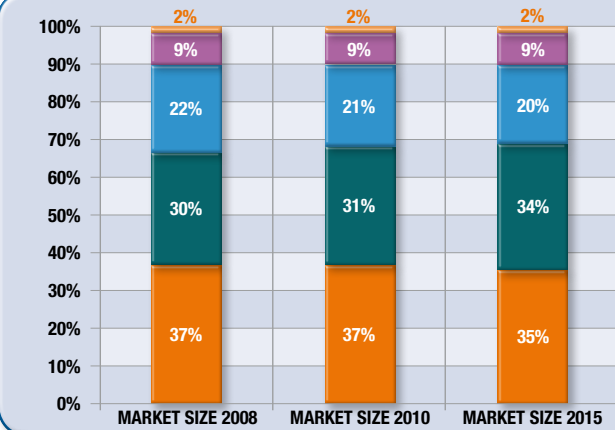
Complementing its well established partnership with HIMSS Analytics Europe, COCIR delivers additional market intelligence services for its members.

Given the critical need for reliable and trusted source of market sizing information in Europe, COCIR healthcare IT members have joined efforts, resulting in better market insights and increased business outcomes, including:

- Reliable and consistent market sizing and forecasting
- Benchmarking across application segments and countries in Europe (and beyond)



HEALTH ICTS IN EUROPEAN HOSPITALS: MARKET'S EVOLUTION FROM 2008 TO 2015 (M€)



HOSPITAL HEALTH ICTS MARKET PER MARKET SEGMENT IN 2008 AND 2010, AND PROJECTED FOR 2015

- CARDIOLOGY IT
- LABORATORY INFORMATION SYSTEMS
- RADIOLOGY IT
- CLINICAL INFORMATION SYSTEMS
- ADMINISTRATION INFORMATION SYSTEMS

2. IMAGING IT

1. COCIR REPORTING FOR THE VENDORS BY THE VENDORS

- **SOLUTIONS COVERED:** Radiology IT (PACS, radiology information systems) & Cardiology IT (cardio PACS and cardiovascular information systems)
- **GEOGRAPHIC COVERAGE:** 54 countries in Europe, Middle-East and Africa
- **METHODOLOGY:** COCIR active companies report quarterly orders and sales in a web-based tool which compiles data gathered and includes by design stringent confidentiality rules. The system automatically calculates aggregated sums. Participating companies review the compiled figures and share brainpower to estimate market size, growth rates and market trends.

COCIR PARTICIPATING COMPANIES:

Agfa HealthCare, Carestream Health, Fujifilm Medical Systems, GE Healthcare, Philips Healthcare, Siemens Healthcare, Toshiba Medical Systems.

2. COCIR MARKET ESTIMATES

Complementing its well established revenues and orders reporting - for vendors by vendors - COCIR now delivers a new service providing market sizing and forecasting, for Imaging IT but also knowledge and insights into key strategic aspects of eHealth for IT vendors, users and policy makers e.g. vendor neutral archiving and image exchanges.

VALUE ADDED FOR A COMPANY WILLING TO JOIN COCIR eHEALTH MARKET INTELLIGENCE CENTER:

- **For Imaging IT:** Access to reliable sales and orders data (directly from the reporting vendors) and the most reliable market estimates on the market
- **For Hospital IT:** Access to more reliable and cost-efficient installed base data through strategic negotiated partnership with HIMSS Analytics Europe, and consensus-based market estimates generated by the vendors for vendors
- Share costs with other active vendors
- Collectively brainstorm on market trends and drivers for growth

COCIR VALUE PROPOSITION

COCIR and HIMSS Analytics Europe join forces to offer significant added-value to COCIR members to access a unique set of market data and forecast.

- **Join NOW** the *eHealth Intelligence Hospital IT Working Group* (WG) and pay full sponsorship of 20 000 € per year to get access to eHospital Census country reports AND a unique country comparison tool (CCT)
- **Join NOW** the *eHealth Intelligence Hospital IT WG* and pay just 20% of the list price (i.e. 4 500 €) to get access to CCT. If you decide to join later-on in addition the eHospital Census country reports at 20 000 € per year, your payment of 4 500 € will be deducted.
- Not interested in joining the eHealth Intelligence Hospital IT WG? You can still get a 50% discount on the list price (i.e. 11 250 €) of the unique CCT.



**OFFER
2013**

COCIR HOW TO JOIN US



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