China Medical Information System
Industry Report, 2011

Oct. 2011
This report

- Analyzes the development of China medical information system
- Focuses on development trend of Chinese medical information system.
- Highlights the operation of key medical information system enterprises in China.

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Abstract

China medical information system is still in its infancy. On the one hand, medical information system construction is mainly focused on hospital information system, while the investment level is still lower. In 2009 the average investment in China hospital information system was only RMB1.9724 million, wherein RMB 2.114 million for first-class ones and RMB1.828 million for others. On the other hand, the charge-centered HIS system is highly popularized while the clinical management information system is rather lower. In 2010 China hospital doctor workstation system, PACS system, electronic medical records system and clinical decision support system showed the coverage rates of only 59.5%, 37.5%, 38.3% and 16.7% respectively.

Overall, during the 12th Five-Year Plan period, China medical information system market is expected to grow fast. In 2010 the investment reached RMB12.44 billion, which is expected to exceed RMB40 billion in 2015 with a compound average growth rate of 26.4%. In early 2011 the Ministry of Health completed the 12th Five-Year health information construction project planning work, established the “3521” project and promoted the medical information system process. Moreover, the unified work of the national social security card launched by the Ministry of Human Resources and Social Security will also bring a comprehensive information system upgrade.

China Medical Information System Industry Report, 2011 mainly includes the following:

- Status quo of China medical services, including medical resource allocation, medical efficiency and main existing problems;
- Policies, construction and investment of China medical information system;
- Analyze China’s existing shortcomings through comparison with the status quo of medical information system in developed countries;
- Competitive pattern and trends of China medical information system market;
- Forecasts of China medical information system, involving investment scale, HIS, CIS, GMIS;
- Characteristics, operations and prospects of ten Chinese enterprises.
There is no administrative restrictions and barriers in China medical information system market, in which lies a lower industrial concentration. In 2009 the total market share by Winning Software, Neusoft Medical, Tianjian Technology, DHC Software and Zhonglian Information accounted for no more than 30%. There is a great difference between the downstream customer – hospital management systems in China and abroad, therefore, most foreign companies enter Chinese market via joint ventures.

In the future, with the increased investment in regional medical information system and hospital information system, there will be higher requirements on registered capital, revenue size, certification qualification, etc. for enterprises involving in China medical information system, as well as further compressed living space for small companies, thus the industrial merger and acquisition will be significantly increased. Thereinto, with greater advantages in brand, capital, technology, etc., leading enterprises will occupy more market share.
- Classification of medical information system
- Classification, function and subsystem of medical information in narrow sense
- Total Number of Healthcare Institutions in China, 2006-2010
- Number of healthcare institutions and beds in China, 2009-2010
- Number of beds in healthcare institutions by region in China (per thousand population), 2009
- Medical service workloads and bed occupancy rate of hospital in China (by Level)
- Treatment Flow of one Hospital in China
- Medical Information System Solutions for Easing Difficulty in Seeing a Doctor
- Policies on medical information in China, 2011
- Policies on medical information in China, 2002-2010
- Construction of hospital information system in China, 2007
- Comparison of clinical information subsystems by coverage, 2007 and 2010
- Hospital information system investment in China by region
- Funds of Different levels of Hospitals investing in Information System in China, 2009
- Market Share of Medical Solutions in China, 2008
- Revenue Scale of Leading Medical Information Manufacturers in China, 2010
- Medical Expenses in the USA, 1970-2010
- Medical IT Expenses in the USA, 2001-2008
- IT Budget of Hospitals in the USA, 2010
- Industry Chain Distribution of Medical IT Suppliers in the USA
- China’s Investments in Medical Information System, 2010-2015
- Implementation of Clinical Information System in Chinese Hospitals, 2010
- Construction of Rural Three-level Medical System in China, 2009-2010
- Construction of Sanitation Service System in Communities around China, 2009-2010
- Categories and Functions of Winning software product
- Operating Revenue and Total Profit of Winning Software, 2008-2011H1
- Gross Margin and Net Profit Margin of Winning Software, 2008-2011H1
- Operating Revenue of Winning Software by Product, 2010
- Operating Revenue of Winning Software by Region, 2010
- Projects with IPO raised funds of Winning Software
- Regional Marketing Center of Winning software
- Operating Revenue and Total Profit of Neusoft Medical, 2008-2011H1
- Operating Revenue and Net Income of DHC, 2008-2011H1
- Operating Revenue of DHC by Industry, 2010
- Operating Revenue of DHC by Region, 2010
- Operating Revenue and Net Income of Wonders Information, 2007-2011H1
- Major Business of Wonders Information
- Equity investment projects and investment of Wonders Information
- G series product System of UF medical
- Operating Revenue and Net Income of Enjoyor Share, 2008-2011H1
- Operating Revenue of Enjoyor Share by Product, 2009-2011H1
- Operating Revenue of Enjoyor Share by Region, 2011H1
- Operating Revenue and Net Income of Yilianzhong, 2008-2011H1
- Operating Revenue of Yilianzhong by Region, 2011H1
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