



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

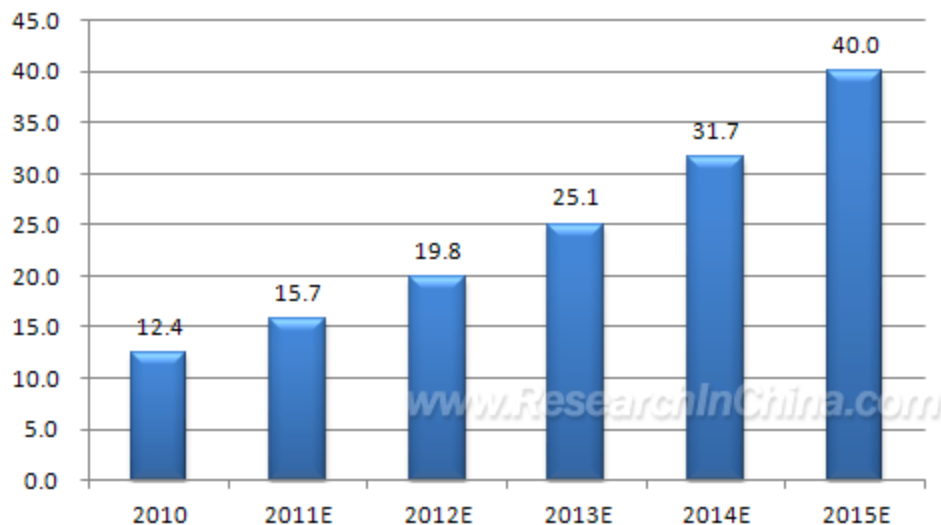
China medical information system is still in its infancy. On the one hand, medical information system construction is mainly focused on hospital information system, while the investment level is still lower. In 2009 the average investment in China hospital information system was only RMB1.9724 million, 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.

China's Investment in Medical Information System, 2010-2015 (Unit: RMB bn)



Source: ResearchInChina

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.

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.

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- Issued 700 million new cards to estimate the corresponding market
- Products and Solutions of Zhonglian soft

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