

# Southeast Asian Hospital Information Systems Market

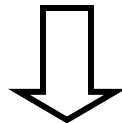


## Executive Summary April 2006

## Market Size

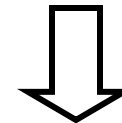
TOTAL HIS MARKET SIZE IN 2005 - \$115.5 Million  
 TOTAL ADMINISTRATIVE HIS MARKET SIZE IN 2005 – \$71.9 Million  
 TOTAL CLINICAL HIS MARKET SIZE IN 2005 - \$43.6 Million

**2005**



	Percentage share in the total HIS market (%)
Administrative HIS	62.3
Clinical HIS	37.7

**2009**



	Percentage share in the total HIS market (%)
Administrative HIS	48
Clinical HIS	52



## Drivers and Restraints affecting the Southeast Asian HIS market

### DRIVERS

Growing competition among private hospitals to drive IT adoption.

Improving government support and expenditure in healthcare.

Rapid increase in Medical Tourism.

LOW

MEDIUM

HIGH

IMPACT

Highly fragmented market mainly concentrated on lower end HIS solutions.

Lack of established Information privacy and portability norms such as HIPAA would curtail rapid adoption in the future.

Rising healthcare costs would limit market growth.

### RESTRAINTS

## Challenges for HIS vendors in Southeast Asia

### Major challenges faced by the vendors in the Southeast Asian HIS market

- Geographical funding imbalances due to low capitation rates.
- Shortage of support staff such as nurses and doctors is adversely affecting healthcare delivery by providers.
- Lack of adequate payor provider integration.
- Inconsistency in budgetary allocation for IT related expenditure for Healthcare.
- Lack of adequate regulations to protect data privacy of patients.

## Technology and Market Trends

Present market conditions

Major market opportunity in THIS - Total Hospital Information Systems (ERP, Financials, Resource Management & Integrated Enterprise wide Applications) and Electronic medical Records for the coming years. The market will look for a tightly integrated system that encompasses as much of this together in a package as opposed to separate systems.

Fast growing competition would lead to falling prices of hospital IT solutions.

Strong government support offered in terms of favorable rules and regulations is encouraging the increased implementation of HIS in private and public hospitals.

Future market conditions

## Major Market Participants



# About Frost & Sullivan

## Benefits of our Research Services

### Competitive Intelligence

- Product analysis
- Competitive strategies
- Market share analysis
- Alliances & Collaborations
- In-depth physician surveys

### Market Sizing & Forecasts

- Demand analysis – epidemiology
- Pricing trends
- Patient penetration by therapy
- Revenue forecasts with clear presentation of methodology, assumptions and sources

### Technology Assessment

- R & D trends
- Pipeline analysis
- Window of opportunity
- Product positioning and market attractiveness for new entrants

### Market Forces

- Reimbursement
- Medicare Prescription Drug Benefit
- Healthcare Environment
- Pricing Issues & Generics
- Market drivers & restraints
- Industry challenges

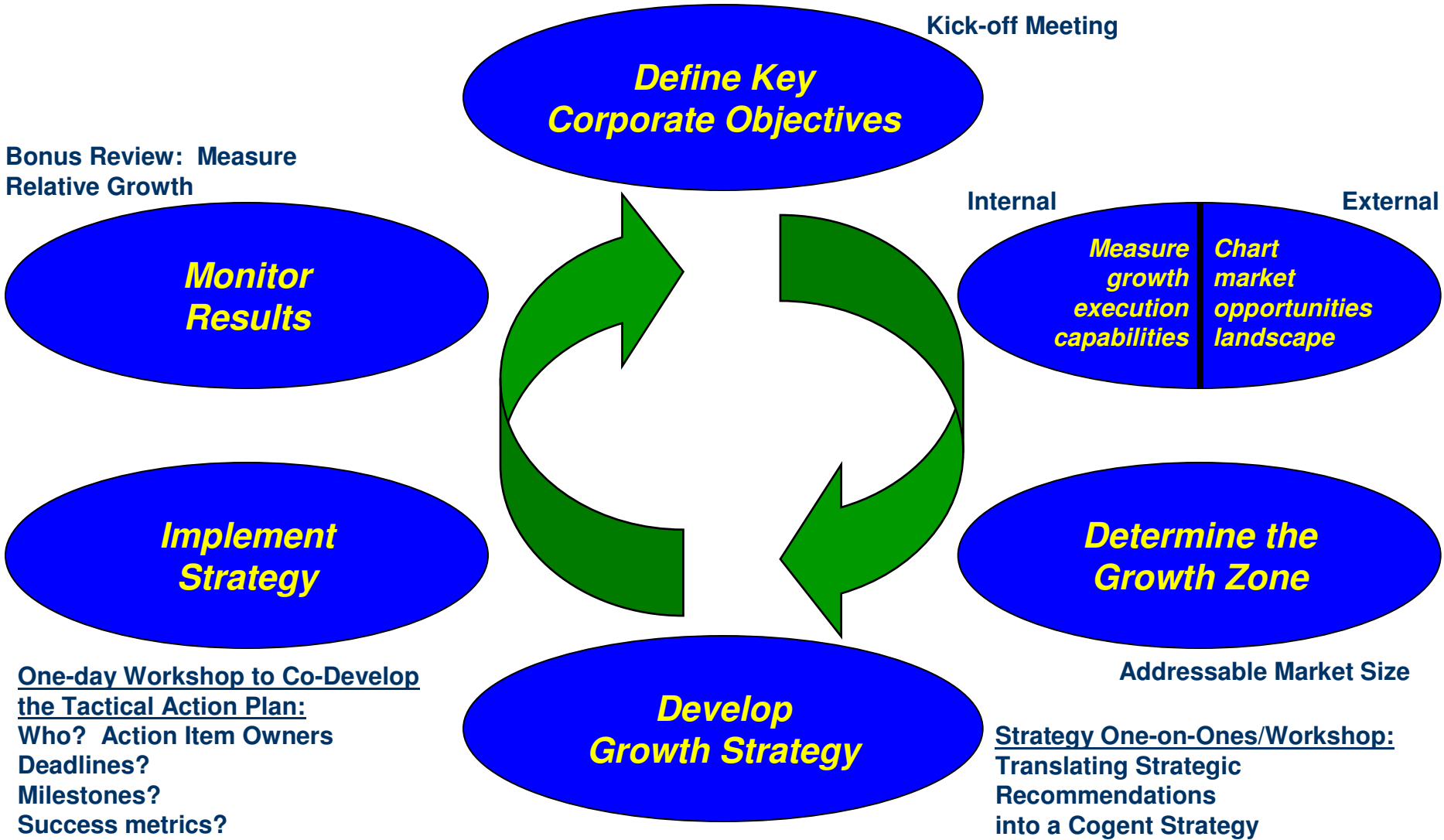
## Our Consulting Services

Our highly-skilled team of consultants can help you meet your growth objectives by:

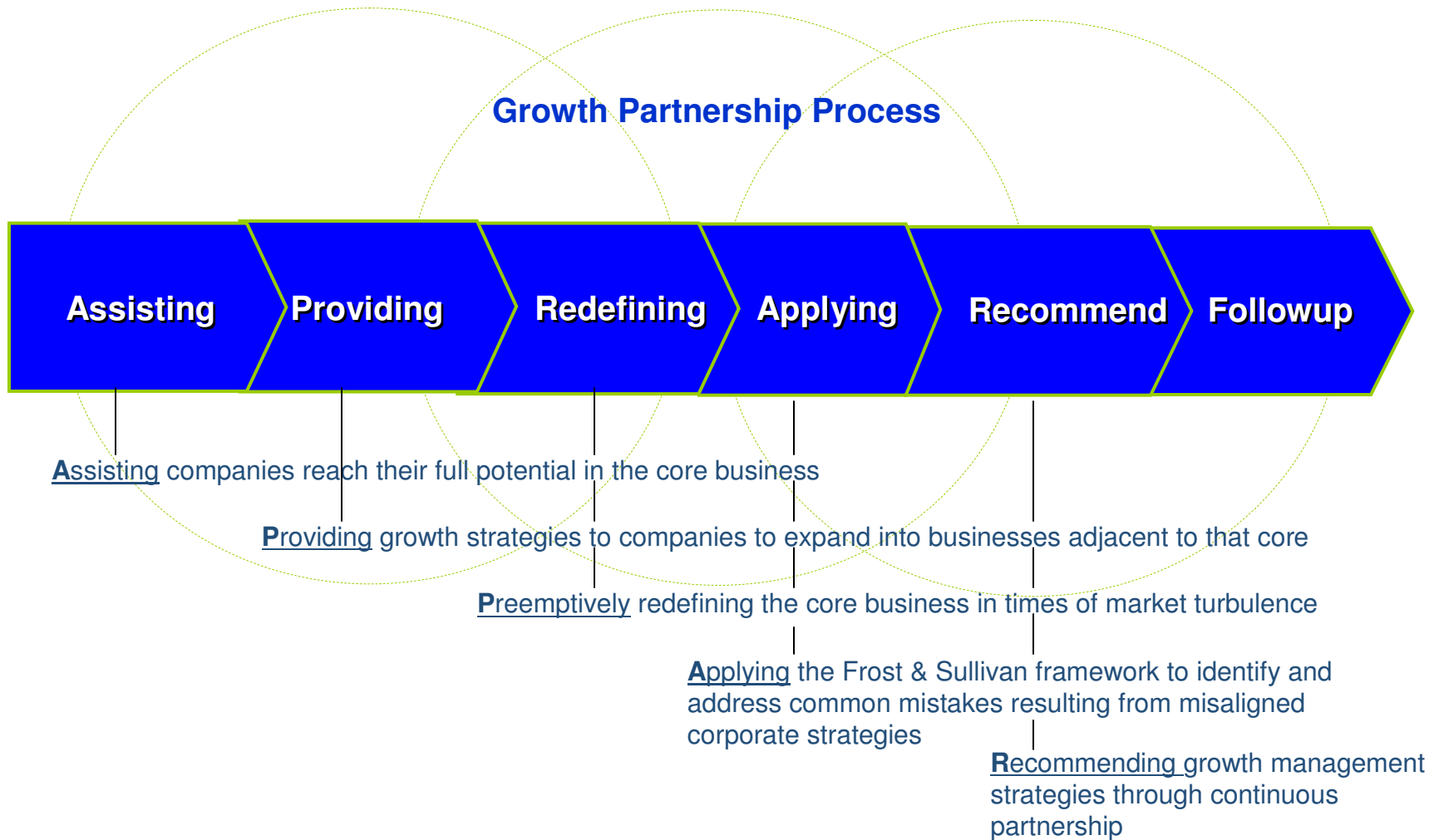
- Assessing the external market opportunities landscape
- Evaluating your internal growth execution capabilities
- Partnering with your team to translate these opportunities into measurable growth



# Growth Consulting Process



# The Growth Partnership Services Platform



**THANK YOU!**



***“Partnering with clients to create innovative growth strategies.”***