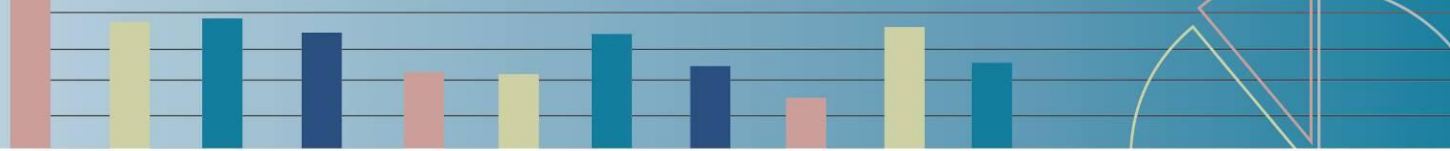


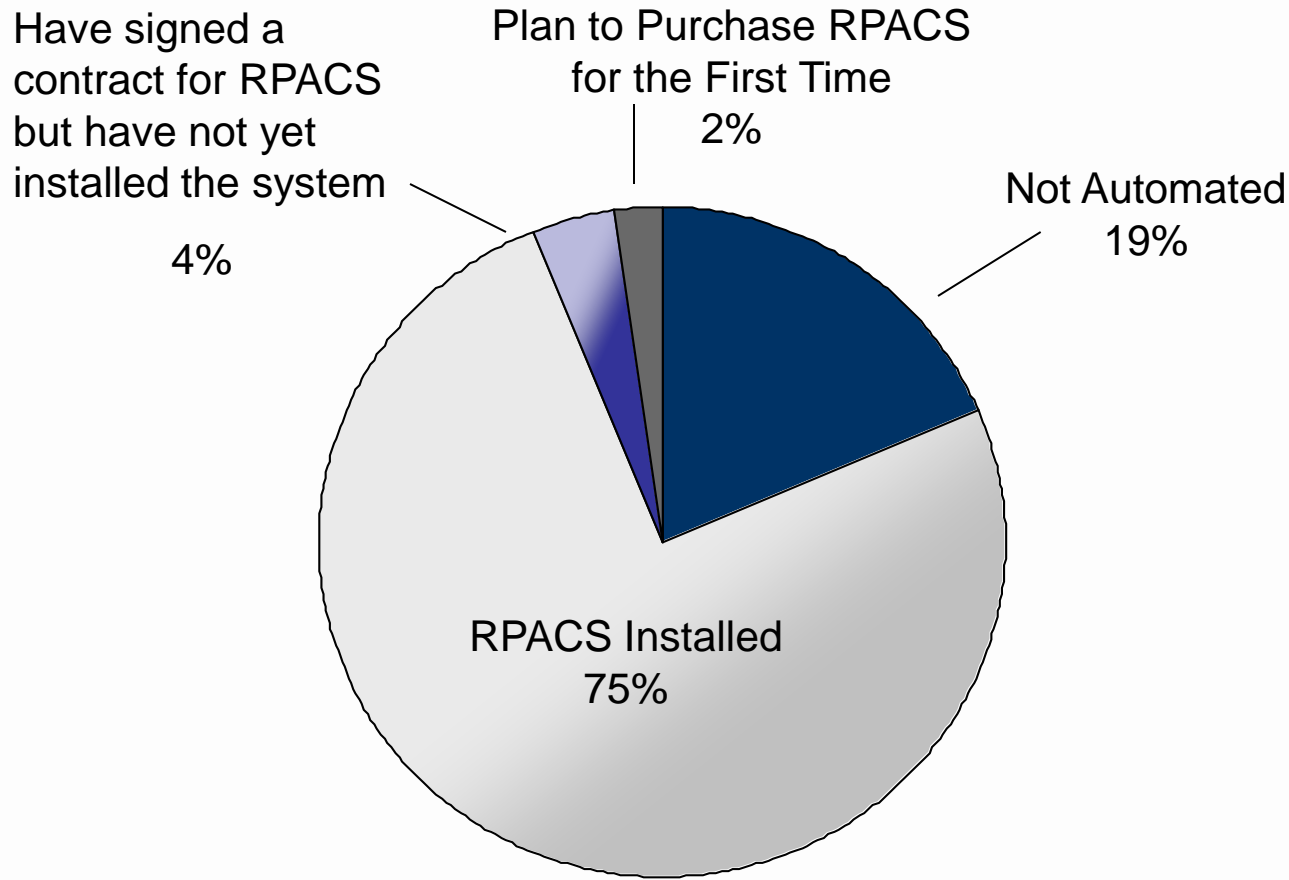
MARKET OVERVIEW

Hospital Radiology PACS (RPACS) Applications 2008

Year End Report



RPACS Installation Summary

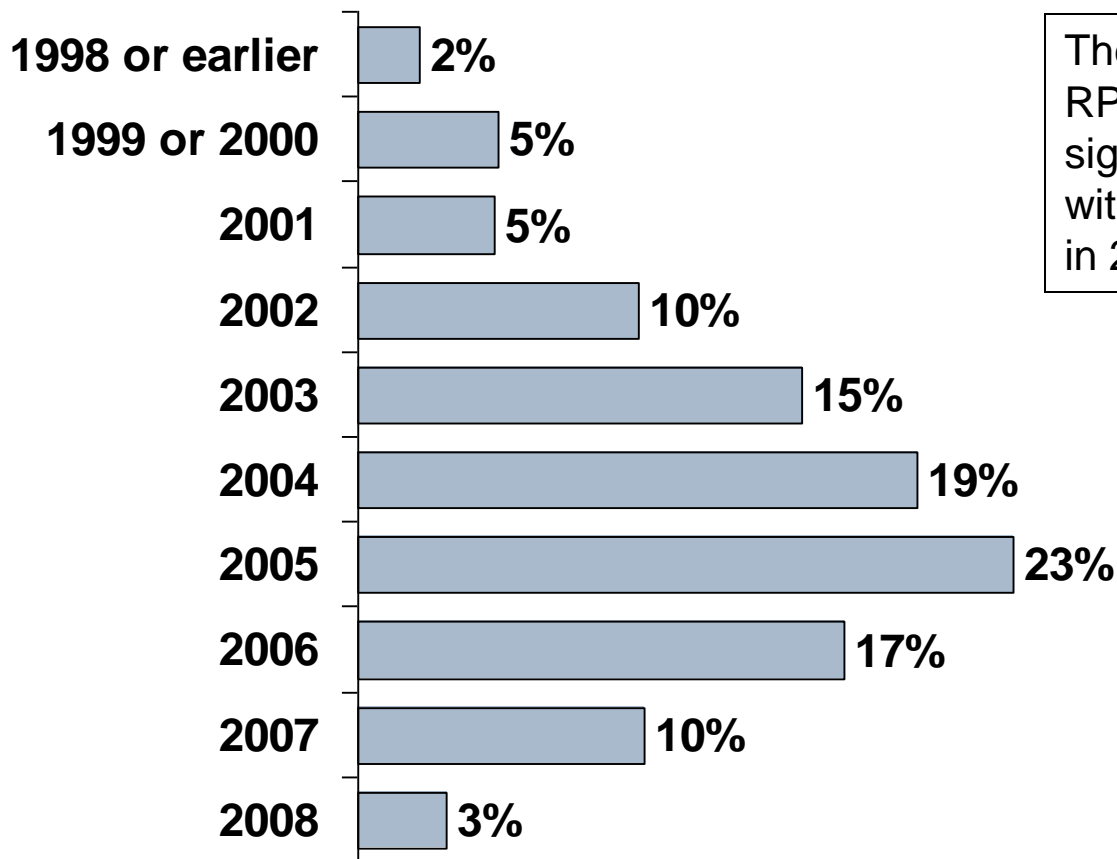


Three-quarters of the hospitals have installed RPACS. Another two percent have immediate plans to purchase RPACS technology for the first time.



RPACS Installation Summary

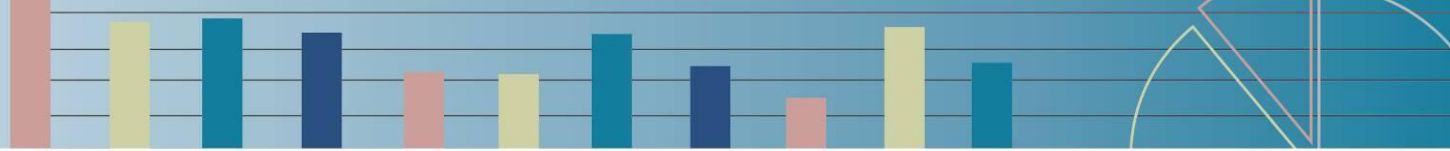
Temporal Summary of Installation and Contract



The majority of contracts for RPACS systems have been signed between 2002 and 2007 with the most contracts signed in 2005.

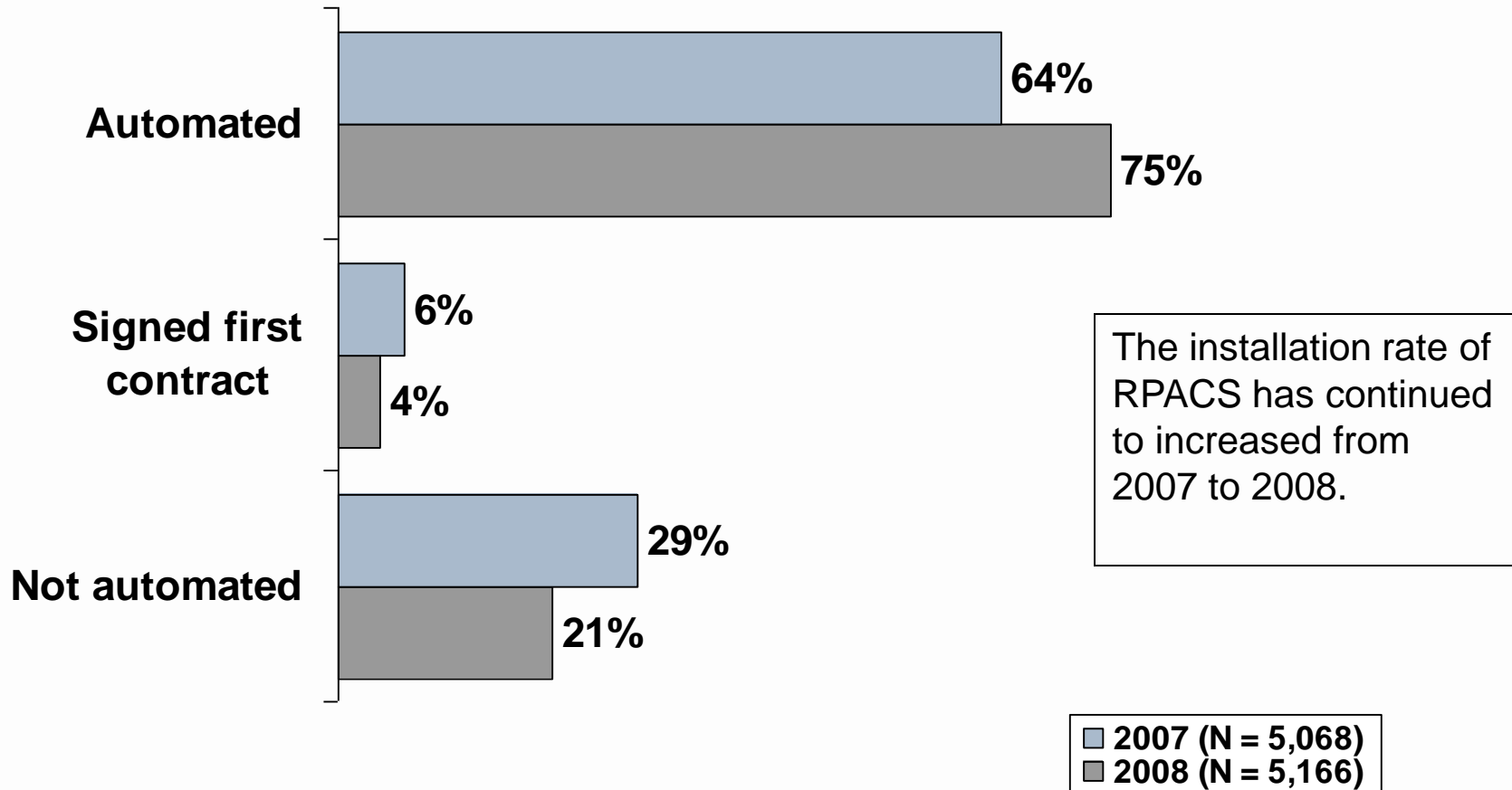
N = 2,724

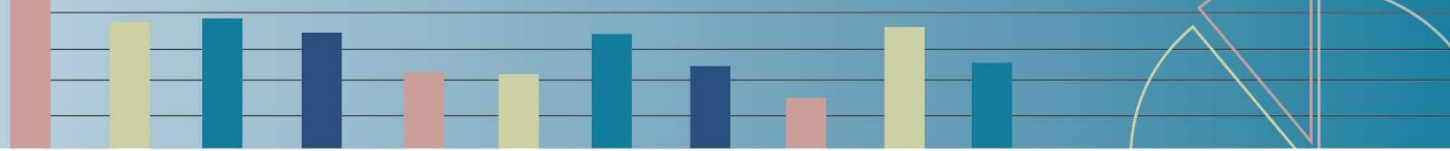
Source: HIMSS Analytics™ Database



RPACS Installation Summary

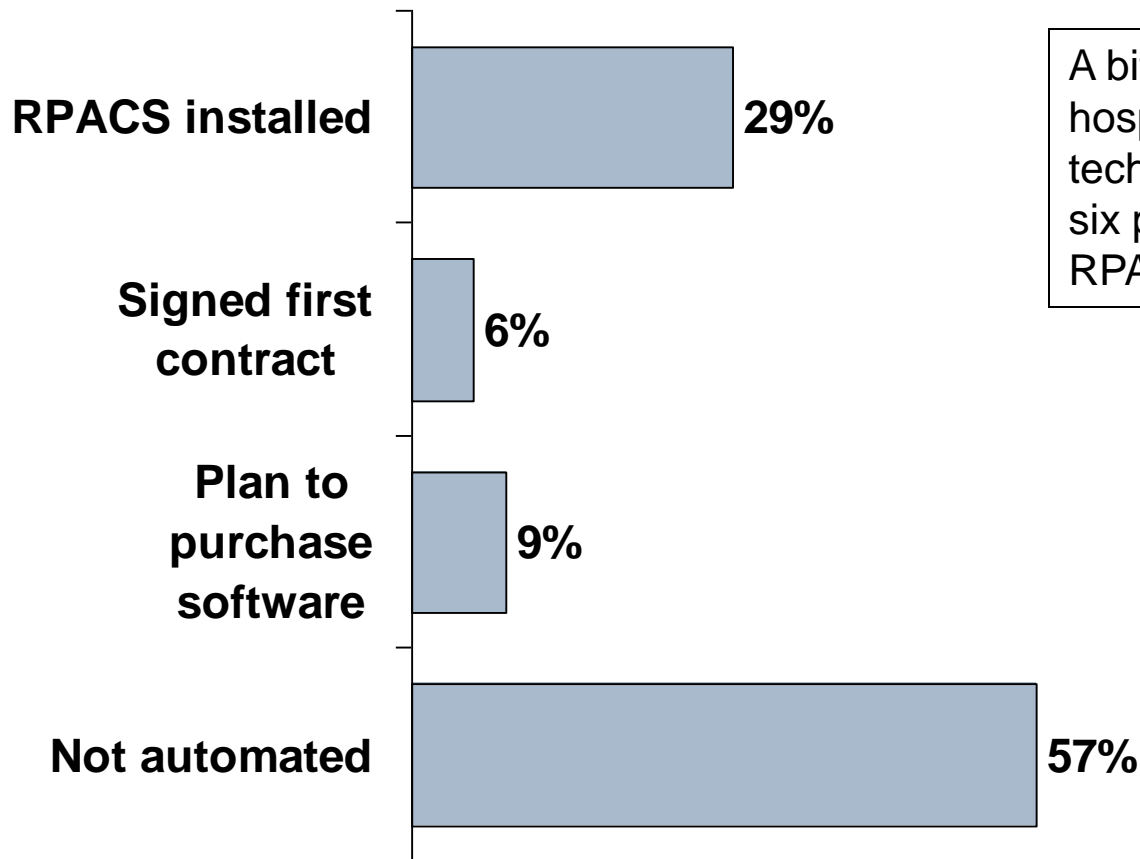
Overall 2007/2008 Data



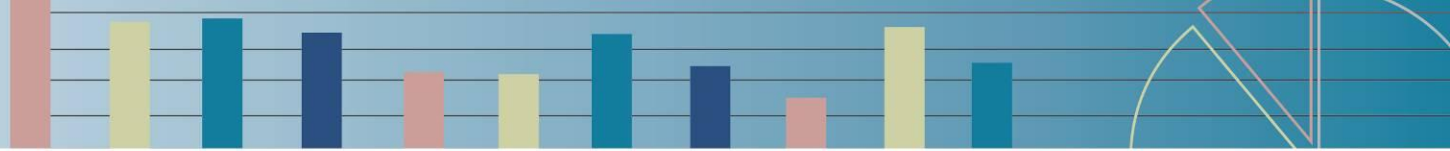


RPACS Installation Summary

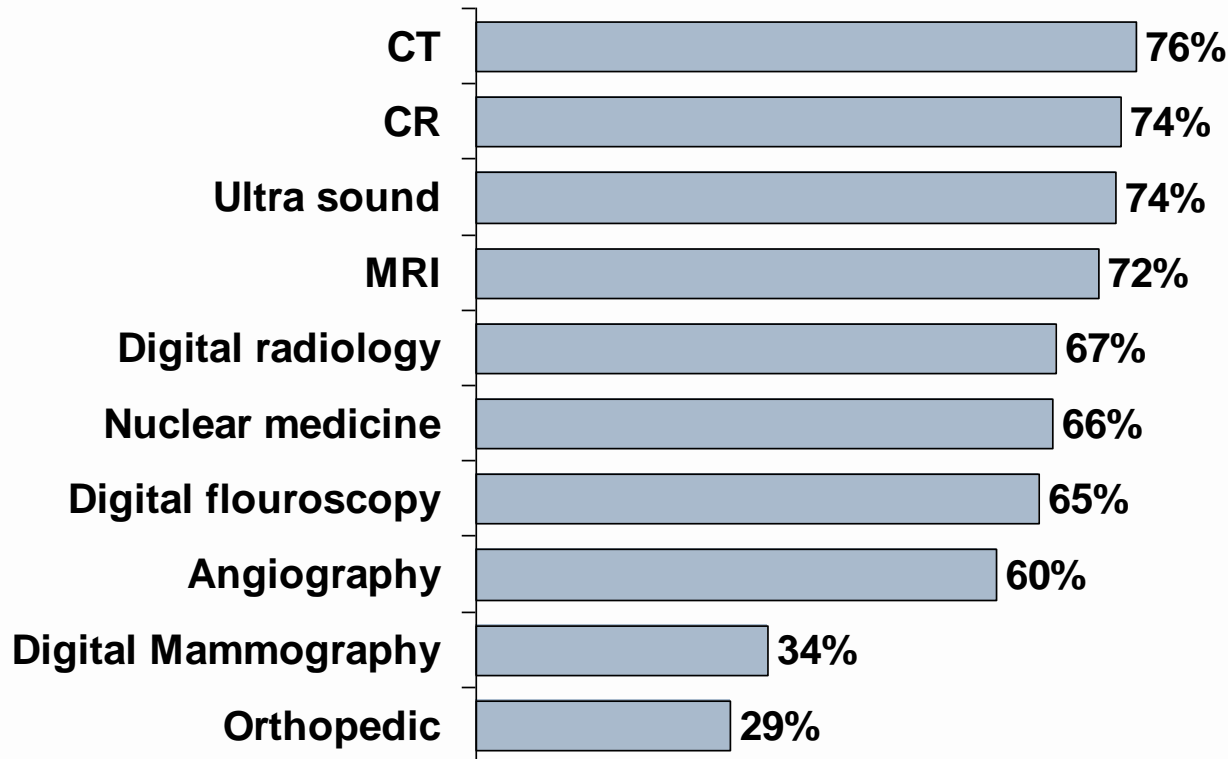
Status of “Not Automated” from 2007 to 2008



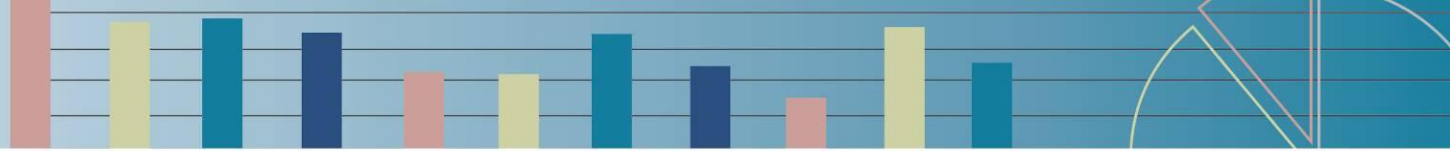
A bit less than one third of the hospitals in 2007 installed this technology in the past year. Another six percent signed a contract for RPACS technology.



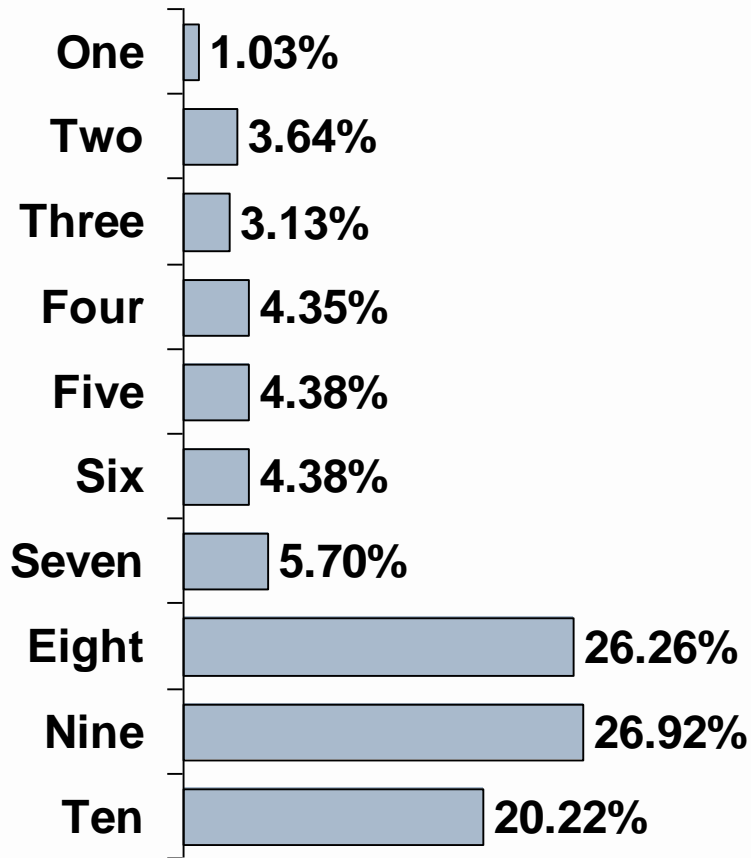
Installation Rate of RPACS Modalities



With the exception of digital mammography and orthopedic, more than half of the hospitals have installed RPACS across different modalities. CT and CR have the highest installation rate, followed closely by Ultrasound and MRI.



Number of Modalities Installed



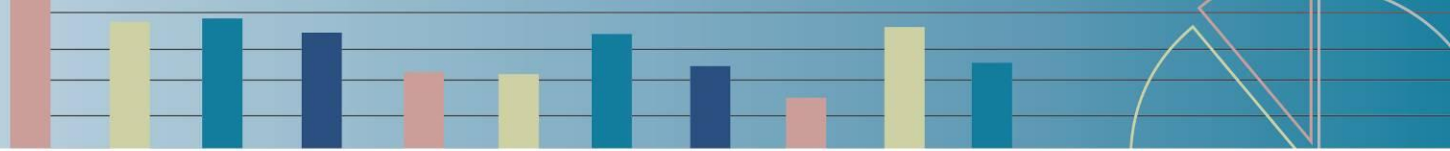
Among hospitals that have installed RPACS technology, most of the hospitals have installed between eight to ten modalities. This suggests that organizations are implementing a full compliment of modality applications with their RPACS acquisition strategy.



Summary of Installations

- 827 hospitals (16 percent) have installed software or signed a contract for software installation for all 10 modalities in radiology PACS.
- 954 hospitals (18 percent) have installed software or signed a contract for all the modalities with the exception of digital mammography.
- 880 (17 percent) have installed software or signed a contract for all the modalities with the exception of orthopedic.
- 1,068 hospitals (21 percent) do not use software in any for radiology PACS.
- The remaining 1,437 hospitals (28 percent) use software for several, but not all, modalities defined in this report.

N = 5,166



Hospital Radiology PACS

Top 10 Installed and Contracted Systems

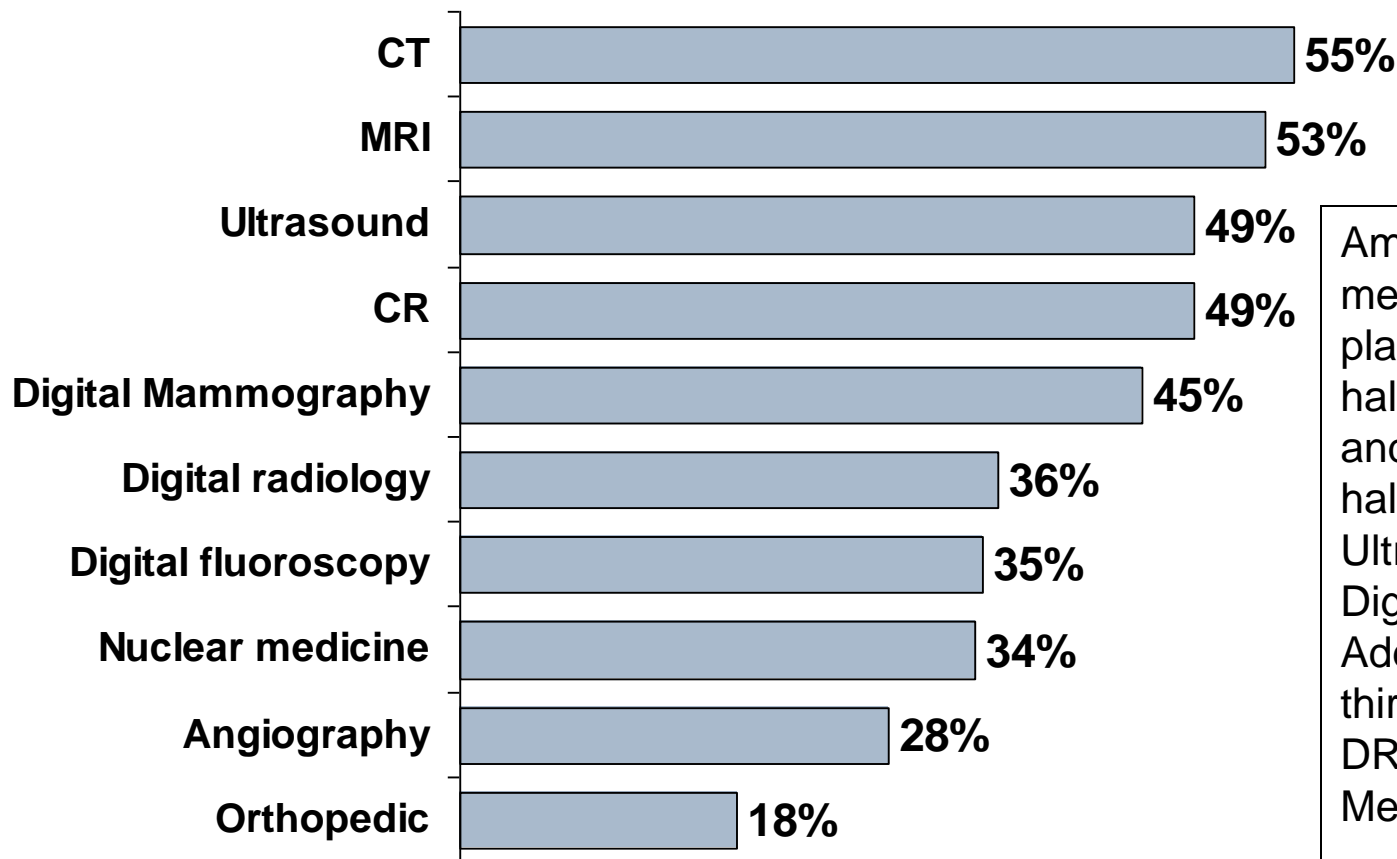
Vendor	# of Installations	% of Market
GE HEALTHCARE	942	23.34%
MCKESSON PROVIDER TECHNOLOGIES	571	14.15%
PHILIPS MEDICAL SYSTEMS	407	10.08%
FUJIFILM MEDICAL SYSTEMS	404	10.01%
AGFA-GEVAERT GROUP	302	7.48%
SIEMENS MEDICAL SOLUTIONS	227	5.62%
NOVARAD CORPORATION	177	4.39%
DR SYSTEMS, INC.	129	3.20%
EMAGEON	129	3.20%
AMICAS	120	2.97%

56 Vendors share the remaining 22.40% of the market.

N = 4,036

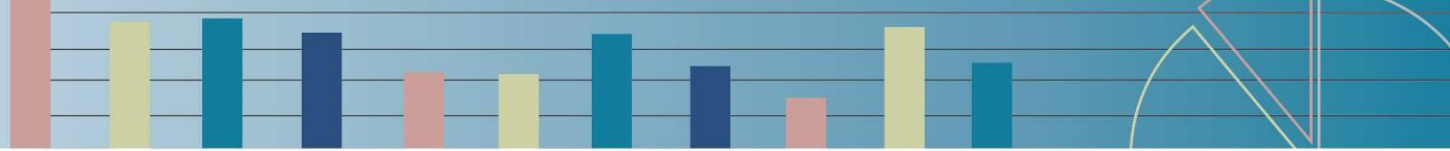
Source: HIMSS Analytics™ Database

Plans to Purchase Radiology PACS Modalities

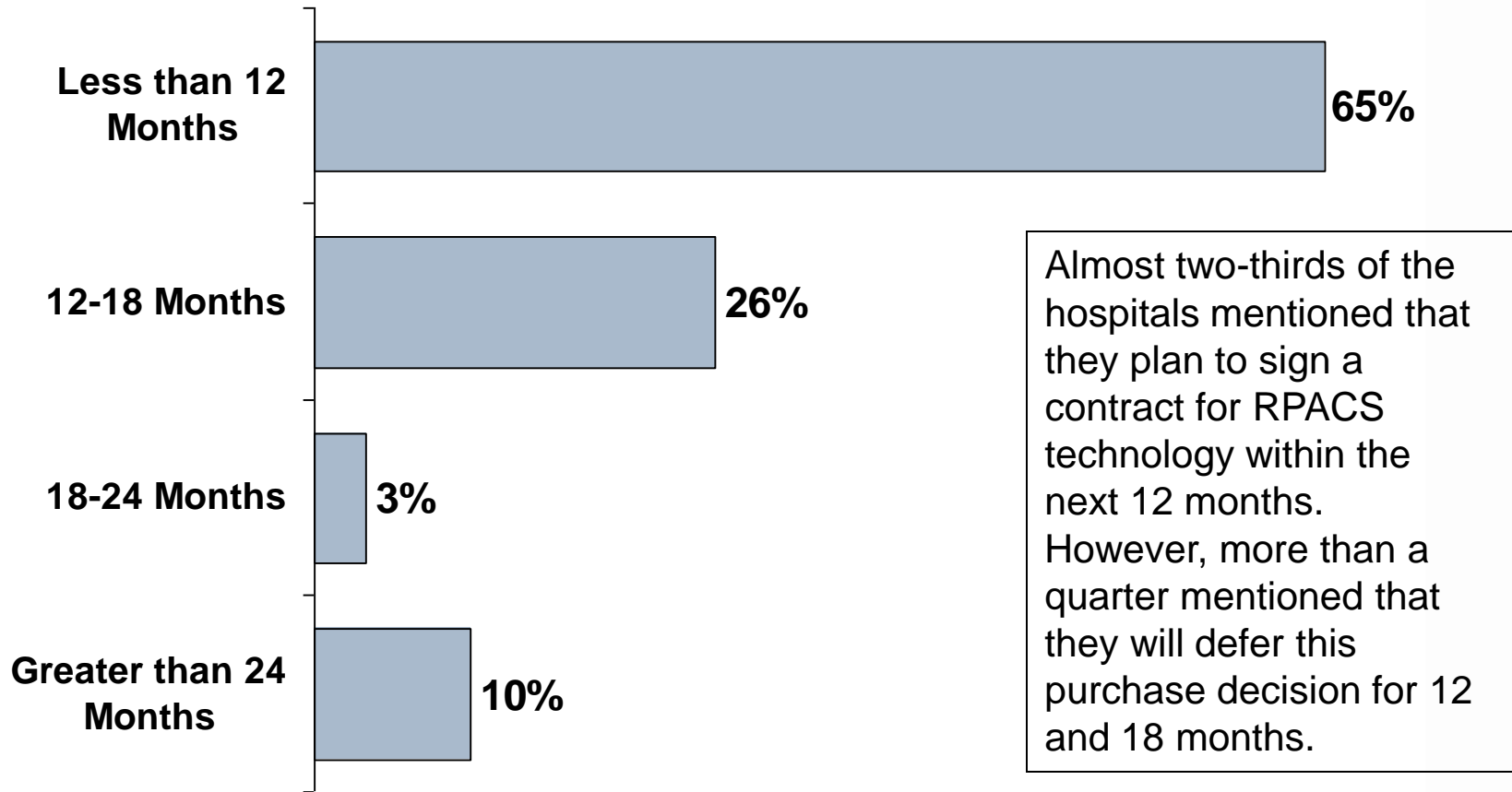


Among those who mentioned that they plan to purchase, over half are planning CT and MRI and almost half are planning Ultrasound, CR and Digital Mammography. Additionally, over two-thirds are planning DR, DF and Nuclear Medicine.

N = 208



Planned Timeframe for Signing a Contract



N = 89

Source: HIMSS Analytics™ Database



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