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Operating Room Integration Market Size, Share & Trends Analysis Report By Component (Software, Services), By Device Type, By Application, By End Use (Hospitals, Ambulatory Surgical Centers), By Region, And Segment Forecasts, 2022 - 2030

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Abstracts

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Operating Room Integration Market Growth & Trends

The global operating room integration market size is anticipated to reach USD 4.4 billion by 2030, according to a new report by Grand View Research, Inc. The market is expected to expand at a CAGR of 11.3% from 2022 to 2030. Increasing redevelopment projects and the adoption of advanced healthcare IT solutions in hospitals is a major factor boosting the market growth. Operating Rooms (OR) are increasingly becoming complex and congested due to the requirement of devices during surgeries such as surgical lights, operating tables, and surgical displays. Integrated Operating Rooms (I-ORs) are becoming a solution for this complexity in ORs.

Though digitization was now high on the agendas of most companies, the COVID-19 pandemic speeded up the paradigm shift towards digitization in 2020. Besides, the trend toward digital ORs was also quickened up by the pandemic. Thus, the COVID-19 crisis created new opportunities to innovate and new ways to create value in the evolving healthcare world. For instance, in March 2021, Olympus has introduced EASYSUITE, a next-generation OR integration solution, in the EMEA area. EASYSUITE features video management and routing, medical content management, procedure recording, and virtual collaboration. As a result, with the introduction of EASYSUITE, the company promoted digitalization in surgery and boosted its position in the EMEA

territory.

The use of video communication solutions has increased during COVID-19, in response to restrictions on travel, to lower the risk of cross-infection and ensure continuous education of surgeons in training. According to a June 2020 article published in Wiley Online Library, Microsoft Teams and Zoom were used for live surgical training teleconferencing at the National University of Malaysia to comply with government protocols during the COVID-19 pandemic. The teleconferencing solution enabled webinar lectures, surgery case-based discussions, viva voce examination, and journal critique exercises. In such unprecedented conditions, teleconferences, online learning, and webinars can be advantageous for surgical education and assessments.

The modern operating room provides consolidated data and offers access to audio and video and controls for all surgical devices at the central command station, allowing the surgeon to achieve various tasks efficiently without the prerequisite to move near the OR. Other advantages of OR integration are it minimizes manpower, maximizes OR efficiency takes less surgical time procedure, and manages patient surgical records.

Most of the Minimally Invasive Surgeries (MIS) procedures such as TAVR, and EVAR, laparoscopic procedures are performed in hybrid integrated OR. Surging patient preference for MIS is boosting the market growth. MIS includes robotic surgery; laparoscopic surgeries that have a wide range of applications in the medical sector. In addition, hospitals have shifted their preference towards advanced MIS procedures for diagnosing chronic diseases. The preference is due to the benefits that this procedure provides such as lower postoperative complication rates along with reduced hospital stay, less pain and offers fast recovery time. It also provides a high accuracy rate as compared to traditional open surgery. The aforementioned factors are anticipated to boost the demand for I-ORs over the forecast period.

The competitors operating in the market are focusing on other strategies such as mergers and acquisitions, collaborative agreements to mark their presence in the market. For instance, In January 2020, Brainlab declared its acquisition of Vision Tree Software. Vision tree Optimal Care (VTOC) platform, which provides EHR, research, and registry platform. The acquisition will provide an opportunity to capture data by point-of-care electronic forms and use inefficient workflows. The strategies like these implemented by the leader in this vertical are further propelling the market growth.

Operating Room Integration Market Highlights

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OR integrated services are expected to witness the fastest growth rate in coming years owing to the growing demand from ambulatory surgical centers and hospitals

The documentation management systems segment dominated the market in 2021 owing to the associated benefits such as data management with minimal errors

Demand for fully integrated solutions to automated surgical workflows is growing in accordance with the requirements to access all the necessary information on a single platform. This helps in expediting the surgical procedure and eliminates the need for various devices arranged all over in the operating room

The orthopedic surgery segment is anticipated to show a lucrative CAGR owing to its growing demand. There is an increase in the number of cases of orthopedic conditions, including osteoarthritis, osteoporosis, rheumatoid arthritis, and ligamentous knee injuries

North America dominated the market as of 2021, which is attributable to supportive government initiatives promoting the adoption of surgical automation, telemedicine, and other advanced technologies to support the use of integrated solutions in operating rooms

Market players are involved in extensive research for the development of cost-efficient and technologically advanced OR integration solutions. Subsequently, the introduction of such solutions is expected to provide the market with lucrative growth opportunities.

In April 2021, Barco proclaimed its partnership with Sigma - Jones | AV LLP to deliver best-in-class digital experiences in healthcare for its next-gen operating room video integration solution Nexxis

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Contents

CHAPTER 1 RESEARCH METHODOLOGY & SCOPE

1.1 Market Segmentation & Scope
  1.1.1 Segment Scope
  1.1.2 Regional Scope
  1.1.3 Estimates & Forecast Timeline
1.2 Research Methodology
1.3 Information Procurement
  1.3.1 Purchased Database
  1.3.2 GVR's Internal Database
  1.3.3 Secondary Sources
  1.3.4 Primary Research
  1.3.5 Details of Primary Research
1.4 Information or Data Analysis
  1.4.1 Data Analysis Models
1.5 Market Formulation & Validation
1.6 Model Details
  1.6.1 Commodity Flow Analysis (Model 1)
1.7 List of Secondary Sources
1.8 List of Primary Sources
1.9 Abbreviations
1.10 Objectives
1.11 Market Definitions

CHAPTER 2 EXECUTIVE SUMMARY

2.1 Market Outlook
2.2 Segment Outlook
2.3 Competitive Outlook

CHAPTER 3 OPERATING ROOM INTEGRATION MARKET VARIABLES TRENDS & SCOPE

3.1 Market Lineage Outlook
  3.1.1 Parent Market Outlook
  3.1.2 Ancillary Market Outlook
3.2 Penetration & Growth Prospect Mapping by Technology, 2021

3.3 User Perspective Analysis
3.3.1 Market Influencer Analysis
3.4 List of Key End Users
3.5 Regulatory Framework
3.5.1 Regulatory Landscape
3.6 Market Dynamics
3.6.1 Market Driver Analysis
3.6.1.1 Growing adoption of minimally invasive surgeries
3.6.1.2 Rising congestion in OR and demand to streamline surgical workflow
3.6.1.3 Increasing funding to improve OR infrastructure
3.6.2 Market Restraints Analysis
3.6.2.1 Lack of skilled healthcare professionals in emerging countries
3.6.2.2 High cost of implementation of integrated OR
3.7 Industry Analysis - Porter's
3.8 Operating Room Integration Market - SWOT Analysis, by Factor (Political & Legal, Economic, Social and Technological)

CHAPTER 4 OPERATING ROOM INTEGRATION MARKET: TECHNOLOGY DEVELOPMENT ANALYSIS

4.1 Video over IP Market: Comparative Analysis
4.1.1 Software Defined Video Over Ethernet (SDVOE)
4.1.2 Video Over IP
4.1.3 Matrix Switcher
4.2 Surgical Displays: Technology Trend Analysis
4.3 Surgical Teleconferencing Technology Trends
4.3.1 Scoring System for Surgeons in Training
4.3.2 Trends/Issues Related to Archiving Recordings of Surgical Videos
4.3.3 AI In Operating Rooms
4.3.4 Application Development Analysis
4.4 Applications & Technology Trend Analysis of Image-guided surgery AI

CHAPTER 5 OPERATING ROOM INTEGRATION MARKET: COVID-19 IMPACT ANALYSIS

5.1 Disease Prevalence Analysis
5.2 Current and Future Impact Analysis
5.3 Impact on Market Players

CHAPTER 6 OPERATING ROOM INTEGRATION MARKET: COMPETITIVE ANALYSIS

6.1 Market Participation Categorization
6.2 Competitive Analysis
6.2.1 Company Market Position Analysis
6.2.2 Market Leader
6.2.3 Innovators
6.2.4 Vendor Landscape
6.2.4.1 List of emerging market players

CHAPTER 7 OPERATING ROOM INTEGRATION MARKET: COMPONENT ANALYSIS

7.1 Component Business Analysis
7.1.1 Software
7.1.1.1 Software market estimates and forecasts, 2017 - 2030 (USD Million)
7.1.2 Services
7.1.2.1 Services market estimates and forecasts, 2017 - 2030 (USD Million)

CHAPTER 8 OPERATING ROOM INTEGRATION MARKET: DEVICE TYPE ANALYSIS

8.1 Device Type Business Analysis
8.1.1 Audio Video Management System
8.1.1.1 Audio Video Management System market estimates and forecasts, 2017 - 2030 (USD Million)
8.1.2 Display system
8.1.2.1 Display System market estimates and forecasts, 2017 - 2030 (USD Million)
8.1.3 Documentation Management System
8.1.3.1 Documentation Management System market estimates and forecasts, 2017 - 2030 (USD Million)

CHAPTER 9 OPERATING ROOM INTEGRATION MARKET: APPLICATION TYPE

9.1 Application Type Analysis
9.1.1 General Surgery
9.1.1.1 General Surgery market estimates and forecasts, 2017 - 2030 (USD Million)
9.1.2 Orthopedic Surgery

9.1.2.1 Orthopedic Surgery market estimates and forecasts, 2017 - 2030 (USD Million)
9.1.3 Neurosurgery
9.1.3.1 Neurosurgery market estimates and forecasts, 2017 - 2030 (USD Million)
9.1.4 Other Surgery
9.1.4.1 Other Surgery market estimates and forecasts, 2017 - 2030 (USD Million)

CHAPTER 10 OPERATING ROOM INTEGRATION MARKET: END-USE

10.1 End-use Business Analysis
10.1.1 Hospitals
10.1.1.1 Hospitals market estimates and forecasts, 2017 - 2030 (USD Million)
10.1.2 Ambulatory Surgical Centers
10.1.2.1 ASCs market estimates and forecasts, 2017 - 2030 (USD Million)

CHAPTER 11 OPERATING ROOM INTEGRATION: REGIONAL MARKET ANALYSIS, BY COMPONENT, DEVICE TYPE, APPLICATION, AND END-USE 2017 - 2030 (USD MILLION)

11.1 Regional Market Share Analysis, 2021 & 2030
11.2 Regional Market Dashboard
11.3 Regional Market Snapshot
11.4 Market Size, & Forecasts and Trend Analysis, 2017 to 2030
11.5 North America
11.5.1 North America Operating Room Integration market estimates and segment forecasts, 2017 - 2030 (USD Million)
11.5.2 U.S.
11.5.2.1 U.S. Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.5.3 Canada
11.5.3.1 Canada operating room integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.6 Europe
11.6.1 Europe Operating Room Integration market estimates and forecasts by countries, 2017 - 2030 (USD Million)
11.6.2 U.K.
11.6.2.1 U.K. Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.6.3 Germany

11.6.3.1 Germany Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.6.4 France
11.6.4.1 France Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.6.5 Italy
11.6.5.1 Italy Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.6.6 Spain
11.6.6.1 Spain Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.7 Asia Pacific
11.7.1 Asia Pacific Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.7.2 Japan
11.7.2.1 Japan operating room integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.7.3 China
11.7.3.1 China operating room integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.7.4 India
11.7.4.1 India Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD MILLION)
11.7.5 Australia
11.7.5.1 Australia Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.7.6 Singapore
11.7.6.1 Singapore Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.8 Latin America
11.8.1 Latin America Operating Room Integration Market Estimates And Forecasts, 2017 - 2030 (USD Million)
11.8.2 Brazil
11.8.2.1 Brazil Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.8.3 Mexico
11.8.3.1 Mexico Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.8.4 Argentina

11.8.4.1 Argentina Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.9 MEA
11.9.1 MEA operating room integration market estimates and forecasts by countries, 2017 - 2030 (USD Million)
11.9.2 South Africa
11.9.2.1 South Africa Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)
11.9.3 UAE
11.9.3.1 UAE Operating Room Integration market estimates and forecasts, 2017 - 2030 (USD Million)

CHAPTER 12 COMPANY PROFILES

12.1 Stryker
12.1.1 Company Overview
12.1.2 Financial Performance
12.1.3 Application Benchmarking
12.1.4 Strategic Initiatives
12.2 Braiblab AG
12.2.1 Company Overview
12.2.2 Application Benchmarking
12.2.3 Strategic Initiatives
12.3 Barco
12.3.1 Company Overview
12.3.2 Financial Performance
12.3.3 Application Benchmarking
12.3.4 Strategic Initiatives
12.4 Dragerwerk AG & Co. KGaA
12.4.1 Company Overview
12.4.2 Application Benchmarking
12.4.3 Strategic Initiatives
12.5 Steris
12.5.1 Company Overview
12.5.2 Financial Performance
12.5.3 Application Benchmarking
12.5.4 Strategic Initiatives
12.6 KARL STORZ SE & CO. KG
12.6.1 Company Overview

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12.6.2 Application Benchmarking
12.6.3 Strategic Initiatives
12.7 Getinge AB
12.7.1 Company Overview
12.7.2 Financial Performance
12.7.2 Application Benchmarking
12.7.3 Strategic Initiatives
12.8 Olympus
12.8.1 Company Overview
12.8.2 Application Benchmarking
12.8.3 Strategic Initiatives
12.9 Care Syntax
12.9.1 Company Overview
12.9.2 Financial Performance
12.9.3 Application Benchmarking
12.9.4 Strategic Initiatives
12.10 Arthrex, Inc.
12.10.1 Company Overview
12.10.2 Financial Performance
12.10.2 Application Benchmarking
12.10.3 Strategic Initiatives

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List Of Tables

LIST OF TABLES

TABLE 1 List of secondary sources
TABLE 2 List of abbreviation
TABLE 3 List of emerging market players of operating room integration market
TABLE 4 North America operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 5 North America operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 6 North America operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 7 North America operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 8 U.S. operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 9 U.S. operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 10 U.S. operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 11 U.S. operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 12 Canada operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 13 Canada operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 14 Canada operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 15 Canada operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 16 Europe operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 17 Europe operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 18 Europe operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 19 Europe operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)

TABLE 20 U.K. operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 21 U.K. operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 22 U.K. operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 23 U.K. operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 24 Germany operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 25 Germany operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 26 Germany operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 27 Germany operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 28 France operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 29 France operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 30 France operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 31 France operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 32 Italy operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 33 Italy operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 34 Italy operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 35 Italy operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 36 Spain operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 37 Spain operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 38 Spain operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 39 Spain operating room integration market estimates and forecasts, by end

use, 2017 - 2030 (USD Million)
TABLE 40 Asia Pacific operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 41 Asia Pacific operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 42 Asia Pacific operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 43 Asia Pacific operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 44 Japan operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 45 Japan operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 46 Japan operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 47 Japan operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 48 China operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 49 China operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 50 China operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 51 China operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 52 India operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 53 India operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 54 India operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 55 India operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 56 Australia operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 57 Australia operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 58 Australia operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)

TABLE 59 Australia operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 60 Singapore operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 61 Singapore operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 62 Singapore operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 63 Singapore operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 64 Latin America operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 65 Latin America operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 66 Latin America operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 67 Latin America operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 68 Brazil operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 69 Brazil operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 70 Brazil operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 71 Brazil operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 72 Mexico operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 73 Mexico operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 74 Mexico operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 75 Mexico operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 76 Argentina operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 77 Argentina operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 78 Argentina operating room integration market estimates and forecasts, by

application type, 2017 - 2030 (USD Million)
TABLE 79 Argentina operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 80 MEA operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 81 MEA operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 82 MEA operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 83 MEA operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 84 South Africa operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 85 South Africa operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 86 South Africa operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 87 South Africa operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)
TABLE 88 UAE operating room integration market estimates and forecasts, by component, 2017 - 2030 (USD Million)
TABLE 89 UAE operating room integration market estimates and forecasts, by device, 2017 - 2030 (USD Million)
TABLE 90 UAE operating room integration market estimates and forecasts, by application type, 2017 - 2030 (USD Million)
TABLE 91 UAE operating room integration market estimates and forecasts, by end use, 2017 - 2030 (USD Million)

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List Of Figures

LIST OF FIGURES

FIG. 1 Market segmentation
FIG. 2 Market research process
FIG. 3 Data triangulation techniques
FIG. 4 Primary research pattern
FIG. 5 Market research approaches
FIG. 6 Value-chain-based sizing & forecasting
FIG. 7 QFD modeling for market share assessment
FIG. 8 Market formulation & validation
FIG. 9 Commodity flow analysis
FIG. 10 Operating Room Integration Market Executive Summary, 2020 (USD Millions)
FIG. 11 Operating Room Integration market revenues, 2020 (USD Millions)
FIG. 12 Segment Outlook
FIG. 13 Strategy framework
FIG. 14 Parent market outlook
FIG. 15 Ancillary market outlook
FIG. 16 Penetration &growth prospect mapping by Technology, 2020
FIG. 17 Operating room integration market trend analysis
FIG. 18 Operating Room Integration Market Timeline Analysis
FIG. 19 Market trends & outlook
FIG. 20 Market driver relevance analysis (Current & future impact)
FIG. 21 Market restraints relevance analysis (Current & future impact)
FIG. 22 Porter’s five force model
FIG. 23 Operating Room Integration Market– SWOT analysis, by factor (political & legal, economic, and technological)
FIG. 24 Market participant categorization
FIG. 25 Operating room integration market company market position analysis
FIG. 26 Operating Room Integration Market Outlook: Key takeaways
FIG. 27 Operating Room Integration Market: Component Movement Analysis
FIG. 28 Global software market, 2017 - 2030 (USD Million)
FIG. 29 Global services market, 2017 - 2030 (USD Million)
FIG. 30 Operating Room Integration Market: Device Type Movement Analysis
FIG. 31 Global audio video management system market, 2017 - 2030 (USD Million)
FIG. 32 Global display system market, 2017 - 2030 (USD Million)
FIG. 33 Global documentation recording system market, 2017 - 2030 (USD Million)
FIG. 34 Operating Room Integration Market Application Type Outlook: Key takeaways

FIG. 35 Operating Room Integration Market: Application Type Movement Analysis
FIG. 36 Global general surgery market, 2017 - 2030 (USD Million)
FIG. 37 Global orthopedic surgery market, 2017 - 2030 (USD Million)
FIG. 38 Global neurosurgery market, 2017 - 2030 (USD Million)
FIG. 39 Global others market, 2017 - 2030 (USD Million)
FIG. 40 Operating Room Integration Market End-Use Outlook: Key takeaways
FIG. 41 Operating Room Integration Market: End-use movement analysis
FIG. 42 Global hospitals market, 2017 - 2030 (USD Million)
FIG. 43 Global ASCs market, 2017 - 2030 (USD Million)
FIG. 44 Regional outlook, 2021 & 2030
FIG. 45 Regional market dashboard
FIG. 46 Regional marketplace: Key takeaways
FIG. 47 North America
FIG. 48 North America operating room integration market by countries, 2017 - 2030 (USD Million)
FIG. 49 U.S. operating room integration market, 2017 - 2030 (USD Million)
FIG. 50 Canada operating room integration market, 2017 - 2030 (USD Million)
FIG. 51 Europe
FIG. 52 Europe operating room integration market by countries, 2017 - 2030 (USD Million)
FIG. 53 U.K. operating room integration market, 2017 - 2030 (USD Million)
FIG. 54 Germany operating room integration market, 2017 - 2030 (USD Million)
FIG. 55 France operating room integration market, 2017 - 2030 (USD Million)
FIG. 56 Italy Operating Room Integration Market, 2017 - 2030 (USD Million)
FIG. 57 Spain Operating Room Integration Market, 2017 - 2030 (USD Million)
FIG. 58 Asia Pacific
FIG. 59 Asia Pacific operating room integration market by countries, 2017 - 2030 (USD Million)
FIG. 60 Japan operating room integration market, 2017 - 2030 (USD Million)
FIG. 61 China operating room integration market, 2017 - 2030 (USD Million)
FIG. 62 India operating room integration market, 2017 - 2030 (USD Million)
FIG. 63 Australia operating room integration market, 2017 - 2030 (USD Million)
FIG. 64 Singapore operating room integration market, 2017 - 2030 (USD Million)
FIG. 65 Latin America
FIG. 66 Latin America operating room integration market by countries, 2017 - 2030 (USD Million)
FIG. 67 Brazil operating room integration market, 2017 - 2030 (USD Million)
FIG. 68 Mexico operating room integration market, 2017 - 2030 (USD Million)
FIG. 69 Argentina operating room integration market, 2017 - 2030 (USD Million)

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FIG. 70 MEA
FIG. 71 South Africa operating room integration market, 2017 - 2030 (USD Million)
FIG. 72 UAE operating room integration market, 2017 - 2030 (USD Million)

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