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Healthcare IT Outsourcing Market - By Application [Provider (EHR, RCM, LIMS) Payer (CRM, Claims Management, Fraud Detection, Billing) Life Science (ERP, CTMS, CDMS) Operational (SCM, BPM) & Infrastructure (IMS, Cloud Computing)] & Industry - Global Forecast To 2018

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Abstracts

Outsourcing is an emerging phenomenon in the healthcare information technology market. It is a screening process wherein an organization selects the most efficient third-party service provider to effectively operate its management and administrative unit. Outsourcing of IT solutions in the healthcare industry has emerged as an efficient solution to mitigate rising healthcare costs and to meet the growing demand for quality care. Over the years, the trend of outsourcing healthcare IT solutions has grown significantly among large organizations and has also attracted mid-sized organizations. In some cases, the entire information management system is outsourced, while in others, only key application services such as implementation of EMR, CRM, and billing systems are outsourced.

The healthcare IT outsourcing market for this report has been segmented by application and by industry. The application market is further classified as provider IT outsourcing, payer IT outsourcing, life science IT outsourcing, operational IT outsourcing, and infrastructure IT outsourcing, while the market by industry is segmented as healthcare (including hospitals, diagnostic laboratories, and clinics), biotechnology, pharmaceutical, clinical research organizations, and health insurance.

The global HCIT outsourcing market is forecast to grow at a CAGR of 7.6%, to reach $50.4 billion by 2018 from $35 billion in 2013. The health insurance industry, healthcare

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systems industry, and pharmaceutical industry are driving the HCIT outsourcing market. These industries follow the HCIT outsourcing model to enhance their focus on core business, reduce operational and maintenance costs, increase access to IT skilled and trained staff (further reducing hiring and training costs), share risk, and quickly implement new technologies.

Factors propelling the growth of the market are the rising pressure to curb healthcare costs across the globe and the growing need to manage cash flow in back-office administration and IT management systems of healthcare provider, payers, and the life science segment. Lack of in-house IT expertise, rise in demand for integrating solutions, growing pressure on healthcare providers to meet the “Meaningful Criteria” set by the U.S. Federal Government, new ICD-10 conversion guidelines for coding, rise in aging population, and growing medical tourism in Asia are also likely to drive the HCIT outsourcing market.

However, factors such as the fragmented nature of the healthcare system and HCIT outsourcing market, requirement for high investment in outsourcing IT solutions, growing concern for data security, and cultural and language barriers restrain the growth of the market.

North America accounts for the largest share - 72% - of the global HCIT outsourcing market and is expected to reach $36 billion by 2018 from $25 billion in 2013. Asia-Pacific and RoW are expected to register CAGRs of 8.1% and 7.8% (2013 to 2018) respectively, followed by North America (7.6%), and Europe (7.2%).

Major players in the market are Accenture Plc. (Ireland), Accretive Health, Inc. (U.S.), Allscripts Healthcare Solutions, Inc. (U.S.), Anthelio Healthcare Solutions (U.S.), Cognizant Technology Solutions (U.S.), Dell, Inc. (U.S.), HCL Technologies (India), Hewlett-Packard Company (U.S.), International Business Machines (IBM) Corporation (U.S.), Infosys Limited (India), McKesson Corporation (U.S.), Siemens Healthcare (Germany), Tata Consultancy Services Ltd. (India), Wipro Ltd. (India), Xerox Corporation (U.S.), Epic System (U.S.), and Computer Sciences Corporation (U.S.).

Scope of the Report

The research report categorizes the healthcare information technology outsourcing market by delivery mode, by components, and application. These markets are further broken down into segments and sub-segments.

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Global Healthcare Information Technology Outsourcing Market, by Application:

Global Provider Outsourcing Market
- Electronic Health Records
- Revenue Cycle Management System
- Laboratory Information and Management System
- Pharmacy Information and Management System
- Others

Global Payer Outsourcing Market
- Customer Relationship Management System
- Claim Processing Management System
- Billing System
- Fraud and Detection System
- Other

Global Life Science Outsourcing Market
- Enterprise Resource Planning
- Clinical Trial Management System
- Clinical Database Management System
- Research and Development IT services
- Others

Global Operational Outsourcing Market

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Supply Chain Management

Business Process Management

Others

Global Infrastructure Outsourcing Market
Infrastructure Management Services

Cloud Computing

Others

Global Healthcare Information Technology Outsourcing Market, by Industry:

Healthcare System

Healthcare Insurance Industry

Pharmaceutical Industry

Clinical Research Organization

Biotechnology

Others

Global Healthcare Information Technology Outsourcing Market, by Geography:

North America

Europe

Asia-Pacific

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Rest of World

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Contents

1 INTRODUCTION

1.1 KEY TAKE-AWAYS
1.2 REPORT DESCRIPTION
1.3 MARKETS COVERED
1.4 STAKEHOLDERS
1.5 RESEARCH METHODOLOGY
  1.5.1 MARKET SIZE
  1.5.2 KEY DATA POINTS FROM SECONDARY SOURCES
  1.5.3 KEY DATA POINTS FROM PRIMARY SOURCES
  1.5.4 ASSUMPTIONS

2 EXECUTIVE SUMMARY

3 MARKET DYNAMICS

3.1 INTRODUCTION
3.2 HEALTHCARE IT OUTSOURCING: PROCESS MODEL
3.3 HEALTHCARE IT OUTSOURCING MARKET SEGMENTATION
3.4 MARKET DYNAMICS
  3.4.1 DRIVERS
    3.4.1.1 HCIT Outsourcing is a Viable Solution to Curtail Healthcare Costs in Each Region
    3.4.1.2 Shortage of In-House IT Professionals
    3.4.1.3 Requirement to Meet the Criteria of “Meaningful Use” to Receive Incentives by the Federal Government
    3.4.1.4 The U.S. Healthcare Mandates Propel the Healthcare IT Outsourcing Market
    3.4.1.5 Accountable Care Organizations
    3.4.1.6 Reduction in Operational Costs
    3.4.1.7 Growing Need to Integrate Healthcare IT Solutions
    3.4.1.8 Improved Quality of Care and Clinical Outcomes
  3.4.2 RESTRAINTS
    3.4.2.1 Fragmented End-User Market Restricts Development of Standard IT Platforms
    3.4.2.2 Rising Incidences of Data Breach and Loss of Confidentiality
    3.4.2.3 Cultural Differences and Language Barriers
  3.4.3 OPPORTUNITIES

+44 20 8123 2220
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3.4.3.1 Consolidating the Healthcare System and the Role of Software Architecture Oriented Programs
3.4.3.2 Growing Concerns for Data Security Offers Opportunities for Outsourcing Private Cloud Computing Models
3.4.3.3 Emerging Markets Offer a Huge Potential for IT Outsourcing
3.4.3.4 ICD-10 Conversion System
3.4.3.5 Shifting Focus Towards Patient-Centric Systems
3.4.3.6 Growing Medical Tourism in India, Singapore, China and Thailand Offers Opportunities for HCIT Outsourcing

4 GLOBAL HCIT OUTSOURCING MARKET, BY APPLICATION

4.1 INTRODUCTION
4.2 PROVIDER IT OUTSOURCING MARKET
4.2.1 ELECTRONIC HEALTH RECORD (EHR)
4.2.2 PHARMACY INFORMATION SYSTEM (PIS)
4.2.3 LABORATORY INFORMATION MANAGEMENT SYSTEM (LIMS)
4.2.4 REVENUE CYCLE MANAGEMENT (RCM) SYSTEM
4.2.5 OTHERS
4.3 PAYER IT OUTSOURCING MARKET
4.3.1 CUSTOMER RELATIONSHIP MANAGEMENT SYSTEM
4.3.2 CLAIM PROCESSING SYSTEM
4.3.3 BILLING SYSTEM
4.3.4 FRAUD DETECTION
4.3.5 OTHERS
4.4 LIFE SCIENCES IT OUTSOURCING MARKET
4.4.1 CLINICAL TRIAL MANAGEMENT SYSTEM (CTMS)
4.4.2 CLINICAL DATABASE MANAGEMENT SYSTEM (CDMS)
4.4.3 ENTERPRISE RESOURCE PLANNING (ERP)
4.4.4 R&D IT SERVICES
4.4.5 OTHERS
4.5 OPERATIONAL IT OUTSOURCING MARKET
4.5.1 SUPPLY CHAIN MANAGEMENT (SCM)
4.5.2 BUSINESS PROCESS MANAGEMENT
4.5.3 OTHERS
4.6 IT INFRASTRUCTURE OUTSOURCING MARKET
4.6.1 INFRASTRUTURE MANAGEMENT SERVICES
4.6.2 CLOUD COMPUTING
4.6.3 OTHERS

+44 20 8123 2220
info@marketpublishers.com

5 HCIT OUTSOURCING MARKET BY INDUSTRY

5.1 INTRODUCTION
5.2 HEALTHCARE PROVIDER SYSTEM
5.3 PHARMACEUTICAL
5.4 BIOTECHNOLOGY
5.5 CLINICAL RESEARCH ORGANIZATION (CRO)
5.6 HEALTH INSURANCE
5.7 OTHERS

6 GEOGRAPHIC ANALYSIS

6.1 INTRODUCTION
6.2 NORTH AMERICA
 6.2.1 HCIT OUTSOURCING: STRATEGIC SOLUTION TO CURTAIL HEALTHCARE COSTS IN THE U.S. AND CANADA
 6.2.2 REGULATORY MANDATES BY PATIENT PROTECTION AND AFFORDABLE CARE ACT STIMULATES THE MARKET
 6.2.3 HOSPITAL READMISSIONS REDUCTION PROGRAM (HRRP) OFFERS OPPORTUNITIES TO THE HCIT OUTSOURCING MARKET
 6.2.4 GROWTH IN AGING POPULATION STIMULATES THE MARKET
6.3 EUROPE
 6.3.1 HCIT OUTSOURCING SUPPORTS EUROPEAN GOVERNMENT INITIATIVES SUCH AS E-HEALTH TO ACHIEVE ITS TARGET
6.4 ASIA-PACIFIC
 6.4.1 NEW OUTLINE BY JAPAN’S INFORMATION AND COMMUNICATION TECHNOLOGY STIMULATES THE MARKET
 6.4.2 GROWTH IN MEDICAL TOURISM AND PRESENCE OF SKILLED IT PROFESSIONALS AT LOW COSTS IN INDIA AND CHINA DRIVES THE MARKET
 6.4.3 INCREASED CLINICAL TRIAL ACTIVITIES IN INDIA, CHINA, AND SINGAPORE PROPEL THE MARKET
 6.4.4 SOUTH KOREA: RAPID TRANSFORMATION FROM TELEMEDICINE TO U-HEALTH OFFERS OPPORTUNITIES TO THE MARKET
6.5 REST OF THE WORLD (ROW)
 6.5.1 SAUDI ARABIA: HCIT OUTSOURCING SUPPORTS STRATEGIC FRAMEWORK DESIGNED FOR THE E-HEALTH PROGRAM
 6.5.2 BRAZIL: HCIT OUTSOURCING SUPPORTS GOVERNMENT INITIATIVES SUCH AS TI MAIOR, PROSOFT, AND LEI DA INFORMATICA AND RENUNCIA

+44 20 8123 2220
info@marketpublishers.com

FISCAL

7 COMPETITIVE LANDSCAPE

7.1 INTRODUCTION
7.2 AGREEMENTS, CONTRACT EXTENSIONS, PARTNERSHIPS, AND COLLABORATIONS
7.3 NEW PRODUCT LAUNCH
7.4 ACQUISITIONS
7.5 EXPANSIONS

8 COMPANY PROFILES (OVERVIEW, PRODUCTS AND SERVICES, FINANCIALS, STRATEGY & DEVELOPMENT)

8.1 ACCENTURE PLC
8.2 ACCRETIVE HEALTH, INC.
8.3 ALLSCRIPTS HEALTHCARE SOLUTIONS, INC.
8.4 ANTHELIO HEALTHCARE SOLUTIONS
8.5 COGNIZANT TECHNOLOGY SOLUTIONS
8.6 DELL, INC.
8.7 HCL TECHNOLOGIES LTD.
8.8 HEWLETT-PACKARD
8.9 IBM CORPORATION
8.10 INFOSYS LIMITED
8.11 MCKESSON CORPORATION
8.12 SIEMENS HEALTHCARE (SUBSIDIARY OF SIEMENS AG)
8.13 TATA CONSULTANCY SERVICES LTD
8.14 WIPRO LIMITED
8.15 XEROX CORPORATION (Details On Overview, Products And Services, Financials, Strategy & Development Might Not Be Captured In Case Of Unlisted Companies.)

+44 20 8123 2220
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List Of Tables

LIST OF TABLES

TABLE 1 GLOBAL HCIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 2 HCIT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 3 PROVIDER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 4 PROVIDER IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 5 EHR OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 6 PIS OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 7 LIMS OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 8 RCM OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 9 OTHER PROVIDER IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 10 PAYER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 11 PAYER IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 12 CRM OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 13 CLAIM PROCESSING OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 14 BILLING SYSTEM OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 15 FRAUD DETECTION OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 16 OTHER PAYER IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 17 LIFE SCIENCESIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 18 LIFE SCIENCESIT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 19 CTMS OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)

+44 20 8123 2220
info@marketpublishers.com

TABLE 20 CDMS OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 21 ERP OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 22 R&D IT SERVICES OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 23 OTHER LIFE SCIENCES IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 24 OPERATIONAL IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 25 OPERATIONAL IT.OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 26 SCM OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 27 BPM OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 28 OTHER OPERATIONAL IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 29 IT INFRASTRUTURE OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 30 IT INFRASTRUTURE OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 31 INFRASTRUCTURE MANAGEMENT SERVICES MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 32 CLOUD COMPUTING OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 33 OTHER IT INFRASTRUCTUREMARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 34 HEALTHCARE IT OUTSOURCING MARKET, BY INDUSTRY, 2011 – 2018 ($MILLION)
TABLE 35 HEALTHCARE PROVIDER IT SOLUTIONS
TABLE 36 HEALTHCARE PROVIDER INDUSTRY IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 37 PHARMACEUTICAL IT SOLUTIONS
TABLE 38 PHARMACEUTICAL INDUSTRY IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 39 BIOTECHNOLOGY IT SOLUTIONS
TABLE 40 BIOTECHNOLOGY INDUSTRY IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)

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info@marketpublishers.com

TABLE 41 CLINICAL RESEARCH ORGANIZATION IT SOLUTIONS
TABLE 42 CRO IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 43 HEALTH INSURANCE IT SOLUTIONS
TABLE 44 HEALTHCARE INSURANCE INDUSTRY IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 45 OTHER HCIT SOLUTIONS
TABLE 46 OTHER INDUSTRY IT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 47 HCIT OUTSOURCING MARKET, BY GEOGRAPHY, 2011 – 2018 ($MILLION)
TABLE 48 NORTH AMERICA: HCIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 49 NORTH AMERICA: PROVIDER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 50 NORTH AMERICA: PAYER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 51 NORTH AMERICA: LIFE SCIENCESIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 52 NORTH AMERICA: OPERATIONAL IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 53 NORTH AMERICA: INFRASTRUCTURE IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 54 NORTH AMERICA: HCIT OUTSOURCING MARKET, BY INDUSTRY, 2011 – 2018 ($MILLION)
TABLE 55 NORTH AMERICA: HCIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 56 NORTH AMERICA: PROVIDER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 57 NORTH AMERICA: PAYER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 58 NORTH AMERICA: LIFE SCIENCESIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 59 NORTH AMERICA: OPERATIONAL IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 60 NORTH AMERICA IT INFRASTRUCTURE OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 61 EUROPE: HCIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)

+44 20 8123 2220
info@marketpublishers.com

TABLE 62 EUROPE: PROVIDER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 63 EUROPE: PAYER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 64 EUROPE: LIFE SCIENCES IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 65 EUROPE: OPERATIONAL IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 66 EUROPE: IT INFRASTRUCTURE OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 67 EUROPE: HCIT OUTSOURCING MARKET, BY INDUSTRY, 2011 – 2018 ($MILLION)
TABLE 68 EUROPE: HCIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 69 EUROPE: PROVIDER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 70 EUROPE: PAYER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 71 EUROPE: LIFE SCIENCESIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 72 EUROPE: OPERATIONAL IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 73 EUROPE: INFRASTRUCTURE IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 74 ASIA-PACIFIC: HCIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 75 ASIA-PACIFIC: PROVIDER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 76 ASIA-PACIFIC: PAYER IT OUTSOURCING MARKET, APPLICATION, 2011 – 2018 ($MILLION)
TABLE 77 ASIA-PACIFIC: LIFE SCIENCESIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 78 ASIA-PACIFIC: OPERATIONAL IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 79 ASIA-PACIFIC: IT INFRASTRUCTURE OUTSOURCING MARKET, APPLICATION, 2011 – 2018 ($MILLION)
TABLE 80 ASIA-PACIFIC: HCIT OUTSOURCING MARKET, BY INDUSTRY, 2011 – 2018 ($MILLION)
TABLE 81 ASIA-PACIFIC: HCIT OUTSOURCING MARKET, BY COUNTRY, 2011 –

+44 20 8123 2220
info@marketpublishers.com

2018 ($MILLION)
TABLE 82 ASIA-PACIFIC: PROVIDER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 83 ASIA-PACIFIC: PAYER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 84 ASIA-PACIFIC: LIFE SCIENCESIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 85 ASIA-PACIFIC: OPERATIONAL IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 86 ASIA-PACIFIC: IT INFRASTRUCTURE OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 87 ROW: HCIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 88 ROW: PROVIDER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 89 ROW: PAYER IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 90 ROW: LIFE SCIENCESIT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 91 ROW: OPERATIONAL IT OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 92 ROW: IT INFRASTRUCTURE OUTSOURCING MARKET, BY APPLICATION, 2011 – 2018 ($MILLION)
TABLE 93 ROW: HCIT OUTSOURCING MARKET, BY INDUSTRY, 2011 – 2018 ($MILLION)
TABLE 94 ROW: HCIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 95 ROW: PROVIDER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 96 ROW: PAYER IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 97 ROW: LIFE SCIENCESIT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 98 ROW: OPERATIONAL IT OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 99 ROW: IT INFRASTRUCTURE OUTSOURCING MARKET, BY COUNTRY, 2011 – 2018 ($MILLION)
TABLE 100 AGREEMENTS, CONTRACT EXTENSIONS, PARTNERSHIPS, AND COLLABORATIONS, 2010 – 2013

+44 20 8123 2220
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TABLE 101 NEW PRODUCT LAUNCH, 2010 – 2013
TABLE 102 ACQUISITIONS, 2010 – 2013
TABLE 103 EXPANSIONS, 2010 – 2013
TABLE 104 ACCENTURE: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 105 ACCENTURE: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 106 ACCENTURE: TOTAL REVENUE, BY SUB-SEGMENT, 2010 – 2012 ($MILLION)
TABLE 107 ACCENTURE: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 108 ACCRETIVE HEALTH: TOTAL REVENUE AND R&D EXPENDITURE, 2009 – 2011 ($MILLION)
TABLE 109 ACCRETIVE HEALTH: TOTAL REVENUE, BY SEGMENT, 2009 – 2011 ($MILLION)
TABLE 110 ALLSCRIPTS: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 111 ALLSCRIPTS: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 112 ALLSCRIPTS: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 113 COGNIZANT: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 114 COGNIZANT: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 115 DELL, INC: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 116 DELL, INC: TOTAL REVENUE, BY PRODUCT AND SERVICES, 2010 – 2012 ($MILLION)
TABLE 117 DELL, INC: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 118 DELL, INC: TOTAL REVENUE, BY SUB-SEGMENT, 2010 – 2012 ($MILLION)
TABLE 119 DELL, INC: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 120 HCL: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 121 HCL: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 122 HEWLETT-PACKARD: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 123 HEWLETT-PACKARD: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)

+44 20 8123 2220
info@marketpublishers.com

TABLE 124 HEWLETT-PACKARD: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 125 IBM: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 126 IBM: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 127 IBM: TOTAL REVENUE, BY OUTSOURCING SERVICES, 2010 – 2012 ($MILLION)
TABLE 128 IBM: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 129 INFOSYS, LTD: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 130 INFOSYS, LTD: TOTAL REVENUE, BY SEGMENT, 2011 – 2012 ($MILLION)
TABLE 131 INFOSYS, LTD: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 132 MCKESSON CORPORATION: TOTAL REVENUE AND R&D EXPENSES, 2010 – 2012 ($MILLION)
TABLE 133 MCKESSON CORPORATION: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 134 MCKESSON CORPORATION: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 135 SIEMENS AG: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 136 SIEMENS AG: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 137 SIEMENS AG: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 138 TATA CONSULTANCY SERVICES LTD.: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 139 TATA CONSULTANCY SERVICES LTD.: TOTAL REVENUE, BY SERVICES, 2011 – 2012 ($MILLION)
TABLE 140 TATA CONSULTANCY SERVICES LTD: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 141 WIPRO: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 142 WIPRO: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)
TABLE 143 WIPRO: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)
TABLE 144 XEROX: TOTAL REVENUE AND R&D EXPENDITURE, 2010 – 2012 ($MILLION)
TABLE 145 XEROX: TOTAL REVENUE, BY SEGMENT, 2010 – 2012 ($MILLION)

+44 20 8123 2220
info@marketpublishers.com

TABLE 146 XEROX: TOTAL REVENUE, BY SERVICES, 2010 – 2012 ($MILLION)
TABLE 147 XEROX: TOTAL REVENUE, BY GEOGRAPHY, 2010 – 2012 ($MILLION)

+44 20 8123 2220
info@marketpublishers.com

List Of Figures

LIST OF FIGURES

FIGURE 1 HEALTHCARE IT OUTSOURCING MARKET, BY APPLICATION, 2013 - 2018 ($MILLION)
FIGURE 2 KEY REASONS FOR HCIT OUTSOURCING
FIGURE 3 GLOBAL HCIT OUTSOURCING: FIVE-STAGE PROCESS MODEL
FIGURE 4 GLOBAL HCIT OUTSOURCING SEGMENTATION
FIGURE 5 GLOBAL HCIT OUTSOURCING MARKET DYNAMICS
FIGURE 6 HEALTHCARE SPENDING, BY GEOGRAPHY, % OF GDP (2010)
FIGURE 7 HCIT OUTSOURCING MARKET, GEOGRAPHIC RANKING ,2013
FIGURE 8 KEY GROWTH STRATEGIES, 2010 – 2013
FIGURE 9 AGREEMENTS, CONTRACT EXTENSIONS, PARTNERSHIPS, AND COLLABORATIONS, BY COMPANY, 2010 – 2013
FIGURE 10 NEW PRODUCT LAUNCH, BY COMPANY, 2010 – 2013
FIGURE 11 ACQUSITIONS, BY COMPANY, 2010 – 2013

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