



Transformational Health

Medical Imaging & Informatics

Selected Existing and Upcoming Research in 2017

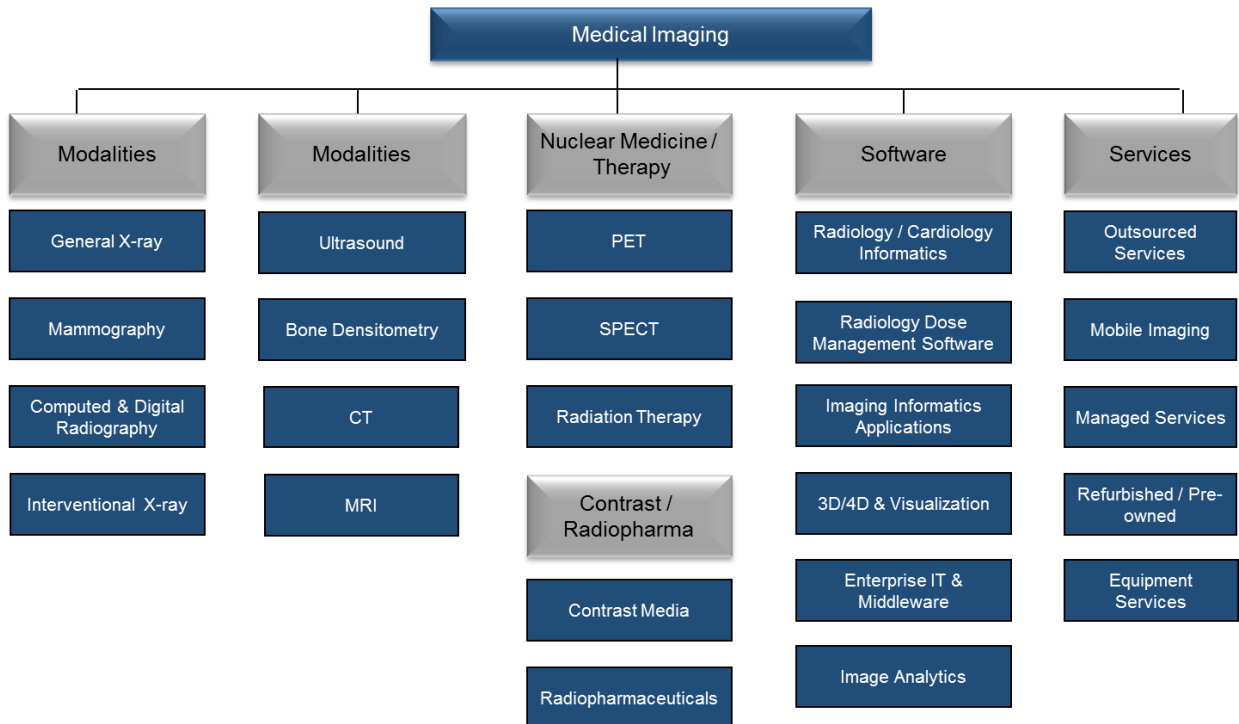


Global healthcare is currently in the process of metamorphosis. National health systems are currently in the process of shifting from a fee for service model of care to value based models. This has resulted in a shift away from patient centric care management to population health management. Development of standard care pathways is rapidly becoming the new normal for a broad range of health conditions.

In this scenario medical imaging will play an integral role in end to end care pathways and population health management. Medical imaging can no longer be viewed as service provided in silos, but as a critical component of value based care. In this context the key objective of both imaging providers and vendors is to maintain a unique “identity” while at the same time smartly balancing “individuality” within a broader spectrum of care provision. Changing procurement models, greater adoption of long term risk sharing partnerships between vendors and care providers as well as reimbursement challenges are some of the major factors that market participants in the medical imaging space need to contend with in order to succeed.

Our research and insights help you make informed strategic decisions around how best to navigate this complex market. We can support needs from syndicated research to projects ranging from proprietary strategic engagements and market research, marketing solutions, and whitepapers, all leveraging the global reach of our firm to propel your business forward.

Transformational Health – Medical Imaging & Informatics Focus Areas



Source: Frost & Sullivan

The Future of Imaging Diagnostics

Upcoming:

- Growth Opportunities for Radiology as a Service (RaaS)
- Pay 4 Performance Impact on Medical Imaging Utilisation
- Impact of Outcomes Based Healthcare in Medical Imaging in USA
- Impact of Outcomes Based Healthcare in Medical Imaging in Europe and the Rest of the World
- Building Service Solutions in the Medical Imaging Sector

The Evolving Competitive Landscape and Transformations in the Imaging Modalities Value Proposition to End Users

Upcoming:

- Global Medical Imaging Outlook Outlook 2017
- Growth Opportunities in Integrated Multi-Modality Breast Workstations
- Interventional X-ray Markets for Surgery, Radiology and Cardiology - Impact of Hybrid Operating Rooms
- Evolution of Image Guided Therapy Solutions to the Forefront
- Innovative Medical Imaging Companies to Watch in USA - Expanding Ecosystem
- Innovative Medical Imaging Companies to Watch in Europe - Expanding Ecosystem
- Refurbished Medical Imaging Equipment Markets - Role of Multi-Vendor Service Players in USA
- Innovative Therapeutic Applications in Medical Imaging - A 2017 View for CT, MRI and Sonography
- Analysis of the Computed and Digital Radiography Markets in Thailand, Indonesia and Malaysia
- Refurbished Medical Imaging Equipment Markets - Role of of Multi-Vendor Service Players in Europe
- U.S Molecular Imaging and Radiopharmaceuticals Markets
- China Medical Imaging Outlook

New Customer Engagement Models in Radiology

- Risk Sharing Models in the Medical Imaging Business –USA
- Risk Sharing Models in the Medical Imaging Business –Europe
- Managed Equipment Services in Medical Imaging in USA
- Procurement of Medical Imaging Equipment & Service Market in Eastern Europe
- Procurement of Medical Imaging Equipment & Service Market in Netherlands and Scandinavia
- Procurement of Medical Imaging Equipment & Service Market in Spain and Italy

Voice of the Imaging Diagnostics Decision Makers

- Survey of Radiology Department / CEO - Perception towards Radiology as a Service (RaaS) and Managed Services in Radiology
- Radiology Department Budget Priorities for 2017
- Radiology Department Pain Points in Meeting Regulatory KPI's

Published:

- Market Assessment of MRI Equipment and its Emerging Clinical Applications, June 2016
- US General X-ray (Computed Radiography / Digital Radiography) Imaging Equipment Markets, 2015
- Revitalized Dynamics in the Medical Imaging Services Market in France, May 2016
- Visible Light Imaging and Operating Room Informatics, April 2016
- ECR Market Insight Computed Tomography Commoditization, March 2016
- HIMSS 2016 - The Internet of Medical Imaging Things and Deep Learning in Medical Imaging, March 2016
- Evolution of Transactional Vendor-customer Relationships into Shared-risk Partnerships, March 2016
- Market Assessment of Value Segment Drivers in Medical Imaging Equipment, February 2016
- Review of Key Medical Imaging Market Trends from RSNA 2015, February 2016
- Movers & Shakers Interview with Dr. Frank J. Rybicki, professor and chair of the Department of Radiology at the University of Ottawa, February 2016
- Movers & Shakers Interview with Dr. James V Rawson, MD, FACR, chair of Department of Radiology and Imaging at the Medical College of Georgia at Augusta University, February 2016
- Medical Imaging Making Decisive Steps towards a Value Focused Environment, January 2016
- Analysis of the Medical Imaging Market in Selected ASEAN Countries, December 2015
- Analysis of the US Breast Imaging Systems Market, November 2015
- Ultrasound - Assessing Market Potential within Emerging Clinical Points of Care, June 2015
- Analysis of the U.S. Medical Imaging Display Markets, May 2015
- Big Data Opportunities in the US Medical Imaging Market, May 2015
- Analysis of the TIM (Thailand, Indonesia, and Malaysia) Digital and Computed Radiography Markets, April 2015
- Western European Contrast Auto-injectors Market, March 2015
- Vital Signs - Review of the 2014 RSNA: The Year of Radiology's Self-Appraisal, December 2014
- Analysis of the Chinese Breast Imaging Systems Market, September 2014
- Analysis of the European Breast Imaging Systems Market, May 2014
- U.S. Nuclear Medicine and PET Imaging Equipment Market, May 2014
- Analysis of the European Ultrasound Markets, May 2014

Imaging Informatics:

Upcoming:

- Growth Opportunities in Image-Based Analytics / Deep Learning in Medical Imaging
- Growth Opportunities in Medical Imaging Advanced Visualization and Clinical Applications Solutions
- Growth Opportunities in Cloud-Based Medical Imaging Informatics
- Growth Opportunities in Clinical Decision Support for Imaging
- Growth Opportunities in Enterprise Image Sharing/ Exchange in Europe
- Developments in Modularized Imaging Informatics Deployment, ‘Deconstructed PACS’ adoption

Published:

- Strategic Analysis of the Global Medical Imaging Informatics Market, July 2016
- Visible Light Imaging and Operating Room Informatics, April 2016
- Development of Value Based Imaging, May 2015
- Analysis of the Advanced Visualization Solutions Market in Western Europe, November 2014
- Vital Signs - Cardiovascular Imaging and Informatics - 2014 European Society of Cardiology Congress Highlights, October 2014
- US Enterprise Medical Image Viewers Market, August 2014
- Analysis of the US Molecular Imaging Informatics Market, September 2014
- Analysis of the Western and Eastern European Image and Information Management Systems Market, September 2013
- Picture Archiving and Communications Systems (PACS) Market Outlook – Malaysia, May 2013
- US Medical Imaging IT Middleware, May 2013
- Vital Signs - The Romance of Image Management and the Cloud: Sunny Days Ahead?, May 2013

Key Contacts: Transformational Health – Medical Imaging and Informatics

Dorman Followwill

Senior Partner, Transformational Health
Dorman.followwill@frost.com | P: +44 (0)1865 398 620

Greg Caressi

Senior Vice President, Transformational Health
gcaressi@frost.com | P: +1 6504754555

Reenita Das

Partner, Senior Vice President, Transformational Health
rdas@frost.com | P: +1 4088579386

Rhenu Bhuller

Partner, Transformational Health – Asia Pacific
rbhuller@frost.com | P: +65 68900986

Siddharth Saha

Vice President, Advanced MedTech
siddharth.saha@frost.com | P: +44(0)208 996 8555

Nadim Daher

Industry Principal, Medical Imaging and Informatics
nadim.daher@frost.com | P: +33 1 4281 3505

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, partners with clients to accelerate their growth. The company's TEAM Research, Growth Consulting, and Growth Team Membership™ empower clients to create a growth-focused culture that generates, evaluates, and implements effective growth strategies. Frost & Sullivan employs over 50 years of experience in partnering with Global 1000 companies, emerging businesses, and the investment community from more than 45 offices on six continents. For more information about Frost & Sullivan's Growth Partnership Services, visit www.frost.com