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These are applications that physicians, nurses and other practitioners use daily to collect and track patient data to improve care decisions and increase hospital productivity. They also capture patient demographics to support various clinical processes and to assist in procedures tracking, ensuring appropriate billing after completion of treatment.

The overarching trend for clinical systems to be found in this HIMSS Foundation research (with data provided through the Dorenfest Institute) shows that the top 10 vendors’ market share has increased over the last seven years in each application category. In fact, several major companies—MEDITECH, Siemens Medical Solutions, McKesson Provider Technologies, Cerner Corp.—are repeatedly listed in most categories’ top 10 rankings, though over a span of years they sometimes changed places.

The top four software companies usually represent more than 50 percent, and sometimes 60 percent, of the combined market in the various categories.

For the most part, the top 10 lists are static, with the same 10 or 12 vendors (and self-developed systems) appearing in every category. SoftMed Systems, Inc., is the primary example of a niche player that makes occasional appearances among the top 10. SoftMed offers applications in only a select number of categories. However, it is no surprise that a small number of vendors dominate the clinical systems market: Many of the biggest companies—MEDITECH, McKesson, Siemens, Cerner Corp., CPSI, QuadraMed Corp., Healthcare Management Systems, Inc., and Eclipsys Corp.—offer highly integrated clinical suites.

Though self-developed applications created by information technology departments and consultants also play a role in clinical systems’ deployment, they represent less than 5 percent of the market in all but
two applications: clinical data repository and clinical decision support.

In aggregate, the data used for this paper reveal several other interesting market trends. One is the growing dominance of MEDITECH. In 1998, MEDITECH often held second or third place in several categories. By 2005, it held first place in every category except surgery, where it ranks second in all four of that segment’s sub-categories. A closer look shows MEDITECH’s market share has, in most cases, grown annually. MEDITECH has at least a 22 percent market share in each application, and often exceeds 24 percent.

A second point of interest is the lack of penetration of some clinical systems applications. In 2005, enterprise master person index systems were installed in only 26.13 percent of hospitals surveyed. Enterprise EMR installations totaled 56.36 percent, while clinical decision support stood at 63.57 percent, and clinical data repository reached 72.79 percent. Three of the four surgery sub-categories had installation rates of 50 percent or less.

The upside is that growth opportunity in these areas appears strong, which is a far cry from the more mature financial systems marketplace, where the lowest penetration of any application was 63 percent. (A companion piece to this white paper that explores the financial systems market is also available from the HIMSS Foundation.)

Clinical systems data offers another compelling revelation: While the names among the top 10 rarely change in most categories, Epic Systems Corp. has surged into the top 10 since 2002. Often, the company could not be found in the top 20 prior to 2002. If Epic did not make the top 10 list in a particular application, such as abstracting, it often holds a place somewhere among the next five positions. The reason for that particular company’s success is not investigated in this white paper, but it likely has much to do with Epic’s growing reputation for providing award-winning applications rather than through acquisitions.

But acquisitions do, in fact, account for the growth of some companies. This data is highly influenced by McKesson Corp.’s acquisition of HBOC, Inc. in 1999 and Siemens’ merger with Shared Medical Systems (SMS) to form Siemens Medical Solutions in 2000. Both became top four vendors in most of the clinical systems’ categories afterward. Similarly, GE’s 2005 acquisition of IDX likely will play an important role in that company’s future.

Many of the vendors that currently hold down the 11th to 15th positions for each application have occasionally appeared among the top 10, or have hovered near it, for many years. These include 3M Health Information Systems, Dairyland Healthcare Solutions, Health Care Systems Inc., SCC Computer and Per-Se Technologies and Mediware Information Systems, Inc., among others.

Despite MEDITECH’s growing dominance in the clinical IT market, there is some good news for the other vendors. Opportunities remain; several application areas, as noted, have relatively low installation levels. Though the leading vendors may have a huge share in those applications, a large market still exists to be tapped. The surge of Epic and a few other vendors demonstrates that there is hope for newcomers to find a place among the top vendors.

The moral of the story appears plain: Good products will succeed in the clinical systems’ IT market and competitors can still rise through the ranks—if they offer compelling applications.
ABSTRACTING

Vendors in this category distribute software that facilitates collection and maintenance of coded patient information with selected patient demographic, clinical and admissions data from medical records.

The top 10 abstracting vendors accounted for 85.69 percent of the market in 2005. Top vendors include MEDITECH (24.78 percent), McKesson Provider Technologies (16.70 percent) and Siemens Medical Solutions (10.73 percent). 3M Health Information Systems, SoftMed Systems, Inc., QuadraMed Corp., CPSI, Cerner Corp. and Healthcare Management Systems, Inc. round out the list. These vendors hold between 8.36 percent and 3.63 percent of the market. Another 2.65 percent uses self-developed applications, which are also in the top 10.

In 2005, 3,886 hospitals had either installed abstracting software or had signed a contract to do so. This represents 96.91 percent of the hospitals tracked in the sample, compared to 89.46 percent in 1998.

HIGHLIGHTS

- The top five abstracting system vendors have been in the same position since 2002. Prior to 2002, McKesson had been the top vendor, with MEDITECH in second place and Siemens in third.

- Siemens and 3M have held third and fourth places since 1998. SoftMed moved into the top five in 2001.

- Cerner Corp. entered the top 10 for the first time in 2005 at eighth place, with 4.25 percent of the market.

- Dairyland Healthcare Solutions spent three years in the top 10 prior to 2005, when it fell to 11th place. Keane, Inc. last appeared in the top 10 in 2001.

- Dairyland Healthcare Solutions held ninth place from 2002 to 2004 before dropping to 11th place in 2005. Epic joined the top 15 in 2003 and has vied for the 11th to 15th slots with Meta Health Technology, Inc., Keane, Inc., IDX and Dairyland.

Abstracting
Aggregate Top Ten Vendor Market Share

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Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics® Database (derived from the Dorenfest IHDS+ Database™).
The Clinical Systems Hospital IT Market, 1998-2005

**Highlights**

- None of the top four vendors—which collectively own 60 percent of the market—has fallen below fourth place since 1999.

- First-place MEDITECH has gained market share nearly every year, putting distance between it and SoftMed Systems, which has been losing market share.

- Epic first entered the top 20 in 2003 at 18th place and steadily gained market share, moving into the top 10 in 2005. Cerner joined the top 10 in 2001, QuadraMed in 1999.

- Eclipsys Corp. left the top 10 list for the first time in five years in 2005, which it came in 11th place, controlling 2.08 percent of the segment. That is a shade less than Epic Systems’ 2.16 percent share of the market.

- The vendors seen most often in the 11th to 15th positions are IDX, Dairyland Healthcare Solutions, Keane, Inc. 3M Health Information Systems and Meta Health Technology, Inc.

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**Chart Deficiency**

These vendors distribute software that helps caregivers complete portions of a patient’s chart. Charts and tasks requiring completion may be monitored and distributed via standard reports in the software. The application identifies delinquent charts by department, location and practitioner.

The top 10 chart deficiency vendors accounted for 83.88 percent of the market in 2005. Top vendors include MEDITECH (24.95 percent), SoftMed Systems, Inc. (17.59 percent) and McKesson Provider Technologies (13.24 percent). Siemens Medical Solutions, Cerner Corp., CPSI, QuadraMed Corp., Healthcare Management Systems, Inc. and Epic Systems Corp. round out the top 10, holding between 6.03 percent and 2.16 percent. Another 2.64 percent uses a self-developed application.

In 2005, 3,747 hospitals had either installed chart deficiency software or had signed a contract to do so. This represents 93.44 percent of the hospitals tracked in the sample, compared to 80.19 percent in 1998.

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**Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).**

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### Chart Tracking/Locator

Vendors in this category distribute software that allows the updating and review of locations of patients’ medical records charts. It helps to track medical record charts by employing check out, check-in and reporting capabilities.

The top 10 chart tracking vendors accounted for 85.19 percent of the market in 2005. Top vendors include MEDITECH (25.21 percent), SoftMed Systems, Inc. (18.92 percent) and McKesson Provider Technologies (13.84 percent). Siemens Medical Solutions, Cerner Corp., CPSI, QuadraMed Corp., Healthcare Management Systems, Inc. and Epic Systems Corp. round out the top 10.

These vendors hold between 5.67 percent and 2.31 percent of the market. In addition, 2.45 percent of the market uses self-developed applications.

In 2005, 3,721 hospitals had either installed chart tracking software or had signed a contract to do so. This represents 92.79 percent of the hospitals tracked in the sample, compared to 72.18 percent in 1998.

### Highlights

- The top three vendors in 2005 have not changed positions since 1999. MEDITECH has been in the top slot since 1998.


- Epic has steadily been gaining market share in the past several years, entering the top 10 in 2005 at number 10. Prior to 2003, Epic could not be found among the top 20.

- Eclipsys Corp. fell into 11th place in 2005, the first time in five years it did not hold one of the top 10 positions.

- Dairyland Healthcare Solutions, 3M Health Information Systems and IDX have occupied the 11th to 15th positions for several years, often within 0.10 percent of one another.

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*Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).*
CLINICAL DATA REPOSITORY

These vendors distribute software that provides a centralized database, which allows organizations to collect, store, access and report on various forms of clinical, administrative and financial information within or across healthcare organizations. It provides an open environment for accessing, managing and reporting enterprise information.

The top 10 vendors accounted for 89.92 percent of the market in 2005. Top vendors include MEDITECH (24.91 percent), Siemens Medical Solutions (12.81 percent) and McKesson Provider Technologies (12.44 percent). Cerner Corp., Epic Systems Corp., CPSI, Eclipsys Corp., IDX and Healthcare Management Systems, Inc. round out the top 10. They hold between 11.65 percent and 2.84 percent of the market. In addition, 9.43 percent of the market uses self-developed applications.

In 2005, 2,919 hospitals had either installed clinical data repository software or had signed a contract to do so. This represents 72.79 percent of the hospitals tracked in the sample, compared to 32.70 percent in 1998.

- Cerner has been in the fourth position in clinical data repository arena since 1998.
- Epic entered the top 10 in 2003 at the ninth spot, gradually moving up to sixth place. Healthcare Management entered the top 10 list in 2002 after three years of falling in the top 20.
- QuadraMed continues to hover around the top 10, moving around from eighth to 13th positions since 1999 before settling in at 11th position beginning in 2003.
- 3M Health Information Systems and Dairyland Healthcare Solutions have each appeared in the top 10 twice, but more often battle for the list’s 11th and 12th positions.

DATA FROM 1998 TO 2003 COMES FROM THE DORENFEST IHDS+ DATABASE™.

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Vendors in this category distribute software that uses pre-established rules and guidelines that can be modified by healthcare organizations. It integrates clinical data from several sources to generate alerts and treatment suggestions.

The top 10 chart clinical decision support vendors accounted for 87.50 percent of the market in 2005. Top vendors include MEDITECH (25.44 percent), McKesson Provider Technologies (17.74 percent) and Eclipsys Corp. (9.38 percent). Siemens Medical Solutions, Cerner Corp., CPSI, IDX, Epic Systems Corp. and Healthcare Management Systems, Inc. round out the top 10. These vendors hold between 7.93 percent and 2.50 percent of the market. In addition, 8.01 percent of the market uses self-developed applications.

In 2005, 2,549 hospitals had either installed clinical decision support software or had signed a contract to do so. This represents 63.57 percent of the hospitals tracked in the sample, compared to 32.20 percent in 1998.

**HIGHLIGHTS**

- MEDITECH has dominated the list for six straight years, increasing its market share from 22 percent in 2000 to more than 25 percent today.

- Epic failed to make the top 20 vendors until 2004, when it secured the number 20 spot. Remarkably, it jumped in one year to eighth position in 2005, from 0.46 percent of the market to 2.58 percent.

- The top five providers in 2005, including self-developed applications, have traded places often but each retained a top five position for seven of the last eight years of the survey. Cerner has consistently held sixth place.

- ACS Healthcare Solutions was in the 10th position from 2002 to 2004 before dropping to 11th place in 2005.

- A number of other firms made the top 10 list for a year or two, only to fall to a lower position or off the list entirely.
ENTERPRISE EMR

Vendors in this category distribute software in an application environment consisting of clinical data repository, clinical decision support, controlled medical vocabulary, order entry, computerized practitioner order entry and clinical documentation.

Dorenfest and HIMSS Analytics have only tracked this category since 2002. The top 10 enterprise/EMR vendors accounted for 88.82 percent of the market in 2005. Top vendors include MEDITECH (22.84 percent), McKesson Provider Technologies (15.98 percent) and Cerner Corp. (13.56 percent). Siemens Medical Solutions, Epic Systems Corp., Eclipsys Corp., IDX, CPSI and QuadraMed Corp round out the top 10. These vendors hold between 12.59 percent and 1.50 percent of the market. In addition, 4.23 percent of the market uses self-developed applications.

In 2005, 2,260 hospitals had either installed enterprise EMR software or had signed a contract to do so. This represents 56.36 percent of the hospitals tracked in the sample, compared to 45.05 percent in 2002.

HIGHLIGHTS

• MEDITECH has been the top vendor for three of four years of the survey. Siemens (19.67 percent) edged out MEDITECH (19.33 percent) for the top spot in 2002.

• Epic has had a substantial increase in market share over the past three years, from 0.72 to 5.28 percent. It currently holds fifth position.

• The same top 10 vendors appear nearly every year. The only newcomer was Epic Systems, which dislodged Per-Se Technologies in 2003. Per-Se has subsequently dropped off the top 20 list. The combined market share of the top 10 vendors has decreased since its 2002 high of 90.14 percent.

• There is a substantial gap in the 2005 market share held by fourth place Siemens Medical Solutions (12.59 percent) and fifth-place Epic Systems (5.28 percent), an indication of the strong market position of the top four enterprise EMR providers.

Enterprise EMR
Aggregate Top Ten Vendor Market Share

Data from 2002 and 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).
ENTERPRISE MASTER PATIENT INDEX

Vendors in this category provide an application that maintains unique online listings of patients and medical records across multiple facilities and hospitals. It includes admission, registration and discharge dates, as well as all data pertinent for re-registration.

The top 10 enterprise master patient index (EMPI) vendors accounted for 87.5 percent of the market in 2005. Top companies include MEDITECH (22.65 percent), Siemens Medical Solutions (16.37 percent) and McKesson Provider Technologies (13.32 percent), Cerner Corp., Epic Systems Corp., Initiate Systems, CPSI, IDX and Eclipsys Corp. round out the top 10. Each of these vendors holds between 11.99 percent and 1.52 percent of the market.

In addition 2.66 percent of the market uses self-developed applications.

In 2005, 1,048 hospitals had either installed EMPI software or had signed a contract to do so. This represents 26.13 percent of the hospitals tracked in the sample.

HIGHLIGHTS

• EMPI’s market penetration is the lowest of any application included in this report.

• HIMSS Analytics has just begun tracking this category. Prior to 2005, this category was known as Master Patient Index and penetration rates during that period exceeded 90 percent every year.

• Several top master patient index system market leaders have also done well after the switch to EMPI. The top three 2005 vendors have changed places on occasion but have remained in the top three since 1998.

• Two additional vendors—CPSI and IDX—have made the top list every year, along with self-developed systems. Epic and Initiate Systems joined the list in 2005.

• QuadraMed Corp. has secured 10th place five years in the survey, only relinquishing that spot in 2005.
LABORATORY INFORMATION SYSTEMS

These applications streamline the process management of laboratories for services such as hematology and chemistry. They interface to laboratory analytical instruments to transfer verified results to nurse stations, chart carts and remote physician offices.

The top 10 vendors accounted for 90.95 percent of the market in 2005. Top vendors include MEDITECH (24.72 percent), Cerner Corp. (20.27 percent) and Misys Healthcare Systems (19.82 percent). SCC Soft Computer, McKesson Provider Technologies, CPSI, Healthcare Management Systems, Inc., Siemens Medical Solutions and Dairyland Healthcare Solutions round out the top 10. They hold between 8.26 percent and 1.07 percent of the market. Another 1.23 percent of the market uses self-developed applications.

In 2005, 3,810 hospitals had either installed laboratory information system software or had signed a contract to do so. This represents 95.01 percent of the hospitals tracked in the sample, compared to 82.73 percent in 1998.

- The top three vendors have held the same position on the list for four straight years.
- Outsourced applications held top 20 positions from 1998 to 2001 before dropping off the top 20 list.
- Since 2002, the top 10 market leaders have remained largely the same, although those in the bottom seven positions often traded places on the list.
- Companies holding the 10th position often have held 1 percent of the market or less.

Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).

HIGHLIGHTS

PHARMACY MANAGEMENT INFORMATION SYSTEMS

Vendors in this category provide support for pharmacy departments from an operational, clinical and management perspective. The applications help optimize patient safety, streamline workflows and reduce operational costs.

The top 10 pharmacy management systems accounted for 82.88 percent of the market in 2005. Top vendors include MEDITECH (24.34 percent), McKesson Provider Technologies (18.83 percent) and Cerner Corp. (13.54 percent). Siemens Medical Solutions, CPSI, Mediware Information Systems, Inc., IDX, Healthcare Management Systems, Inc., Healthcare Systems, Inc. and Epic Systems Corp. round out the top 10. Each of these vendors holds between 7.17 percent and 2.43 percent of the market.

In 2005, 3,738 hospitals had either installed pharmacy management information systems software or had signed a contract to do so. This represents 93.12 percent of hospitals tracked in the sample, compared to 85.34 percent in 1998.

• The top four vendors—MEDITECH, McKesson, Cerner and Siemens—have held the same first four positions, in that order, since 1999.

• Eclipsys Corp. made the top 10 list from 1998 until 2002 before dropping into 12th and 11th place the last two years.

• QuadraMed Corp. has bounced between the 10th and 12th spots since 2002. Cardinal Health and Crown Software both have made the lists several times since 1998.

• Self-developed systems do not rank as highly here as for other clinical systems, only three times cracking into the top 10.

Pharmacy Management Systems
Aggregate Top Ten Vendor Market Share

Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).

HIGHLIGHTS

• Epic joined the top list in 2005 at the 10th position. Its first appearance in the top 20 came in 2003, and it moved steadily upward from there.
The Clinical Systems Hospital IT Market, 1998-2005

**Point of Care**

These applications are specifically designed to provide flow sheets and device interfaces that are specific to medical/surgical intensive care services.

The top 10 point-of-care suppliers accounted for 90.54 percent of the market in 2004. (Data was not available for 2005.) Top vendors include MEDITECH (32.36 percent), McKesson Provider Technologies (14.99 percent) and Cerner Corp. (11.12 percent). Siemens Medical Solutions, Eclipsys Corporation, Healthcare Management Systems, Inc., IDX, CPSI and Epic Systems Corp. round out the top 10. Each holds between 9.04 percent and 3.15 percent of the market, while another 1.43 percent uses self-developed applications, which also are among the top 10.

In 2004, 1,681 hospitals had either installed point-of-care software or had signed a contract to do so. This represents 42.14 percent of the hospitals tracked in the sample, compared to 21.32 percent in 1998. This market remains more wide open than other categories, with the second lowest penetration among applications covered in this report.

**Highlights**

- The top 10 has consisted largely of the same companies since 1998 except for Epic, which showed up 2003 for the first time in the ninth spot, which it also held the following year.
- MEDITECH and McKesson have held the top 2 spots since 1998. Siemens held the third position until 2003, when it was surpassed by Cerner Corp.
- QuadraMed Corp. and 3M Health Information Systems both entered the top 10 twice during the seven-year span of the survey—QuadraMed in 2002 (10th place) and 2003 (10th place) and 3M in 1998 (eighth place) and 2002 (ninth place).
- Unlike other categories, self-developed systems rarely have been a significant factor in point-of-care (medical/surgery bedside term) segment, appearing only three times in the top 10 since 1998.

Point of Care
Aggregate Top Ten Vendor Market Share

Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 comes from the HIMSS Analytics® Database (derived from the Dorenfest IHDS+ Database™).
RADIOLOGY INFORMATION SYSTEMS

Vendors of this application provide an automated radiology information system (RIS) that manages the operations and services of the radiology department. The RIS can be integrated with the hospital information system (HIS) and the picture archiving and communications system (PACS).

The top 10 vendors accounted for 89.02 percent of the market in 2005. These include MEDITECH (25.73 percent), Cerner Corp. (15.55 percent) and McKesson Provider Technologies (13.22 percent). Siemens Medical Solutions, IDX, CPSI, Misys Healthcare Systems, Healthcare Management Systems, Inc. and GE Healthcare round out the top 10, with between 11.78 percent and 1.90 percent of the market. In addition, 1.98 percent of the market uses self-developed applications.

In 2005, 3,485 hospitals had either installed radiology information system software or had signed a contract to do so. This represents 86.91 percent of the hospitals tracked in the sample, compared to 70.56 percent in 1998.

HIGHLIGHTS

- Misys Healthcare made its first appearance on the radiology systems list in 2002 after acquiring Sunquest Information Systems, a leading laboratory information system provider. Sunquest made the list twice before the 2002 acquisition.
- The top six vendors have largely remained the same for the past seven years. MEDITECH has always been in the top position, growing in market share almost every year.
- Vendors tend to enter and fall off this list. Per-Se Technologies made the top 10 from 1999 to 2002; now it cannot be found in the top 20.
- GE Healthcare made its first appearance in the top 10 in 2005. Its market share should increase substantially with its recent acquisition of IDX.
- AIM Software Systems, Inc. and QuadraMed have made the top 10, but more often jockey for the 11th to 15th positions.

Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics® Database (derived from the Dorenfest IHDS+ Database™).
**HIGHLIGHTS**

- About half—50.67 percent—of hospitals have installed operating room/peri-operative software or have contracted to do so. The top 10 system vendors in 2005 accounted for 89.57 percent of the market in 2005. Top vendors include McKesson Provider Technologies (20.51 percent) MEDITECH (18.84 percent) and Cerner Corp. (10.87 percent). Other vendors hold between 9.79 percent and 1.67 percent of the market; 2.71 percent use self-developed applications.

- Fully 74.89 percent of the market has installed pre-operative software or is contracted to do so. The top 10 vendors in 2005 accounted for 89.58 percent of the market. Top vendors included McKesson Provider Technologies (24.61 percent) MEDITECH (17.15 percent) and Per-Se Technologies (10.82 percent). Other vendors hold between 9.59 percent and 2.20 percent of the market; 3.50 percent of hospitals use self-developed applications.

- Less than half—48.65 percent—of hospitals have installed post-operative software or contracted to do so. The top 10 vendors accounted for 89.61 percent of the market, led by McKesson Provider Technologies (21.20 percent), MEDITECH (19.30 percent) and Cerner Corp. (10.34 percent). Others hold between 9.98 percent and 1.74 percent of the market; self-developed applications account for 2.76 percent.

- Less than a third—29.50 percent—have installed OR scheduling software have a contract. The top 10 accounted for 89.26 percent, led by McKesson Provider Technologies (24.09 percent), MEDITECH (23.50 percent), Per-Se Technologies and PICIS (9.72 percent each). Others account for between 5.58 percent and 1.52 percent; 2.20 percent use self-developed applications.

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Data from 1998 to 2003 comes from the Dorenfest IHDS+ Database™. Data from 2004 and 2005 comes from the HIMSS Analytics™ Database (derived from the Dorenfest IHDS+ Database™).